

# Great South Coast 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 Great South Coast Regional Partnership region is on traditional lands, including those lands of the Gunditjmarra, Wadawurrung and Eastern Maar people and Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupjalk 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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# 01 Economic Insights

## 1.1 Business and Industry Analysis

Over the past five years, the Great South Coast has realised low or no growth in employment and economic output, however there are emerging areas of opportunity.

- The region remains reliant on traditional Agriculture and Manufacturing industries to drive economic activity, however it is also home to an emerging Health Care and Social Assistance sector.
- When considering employment and output, the region is specialised in Agriculture, Forestry and Fishing. When output alone is considered, it exhibits further specialisations in Mining and some subindustries of manufacturing.
- In the region, four (of 19) sectors have outperformed the average growth rate across regional Victoria. This suggests there are a significant number of local factors influencing the Great South Coast's economic performance.

The region's international export sales have slowly increased over the past decade and now total \$1.4 billion. Tourism had also realised growth prior to COVID-19, with most visits coming from domestic tourists.

- The Great South Coast is home to the deep-water Port of Portland which provides ready access to international markets.
- The region also hosts the Great Ocean Road which is the most popular visitor attraction in the state and the UNESCO World Heritage listed Budj Bim Cultural Landscape.
- The region is also adopting emerging industries such as renewable energy generation and hydrogen. However this is not revealed in the historical economic data.

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 1.11 (below) identifies the Great South Coast 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

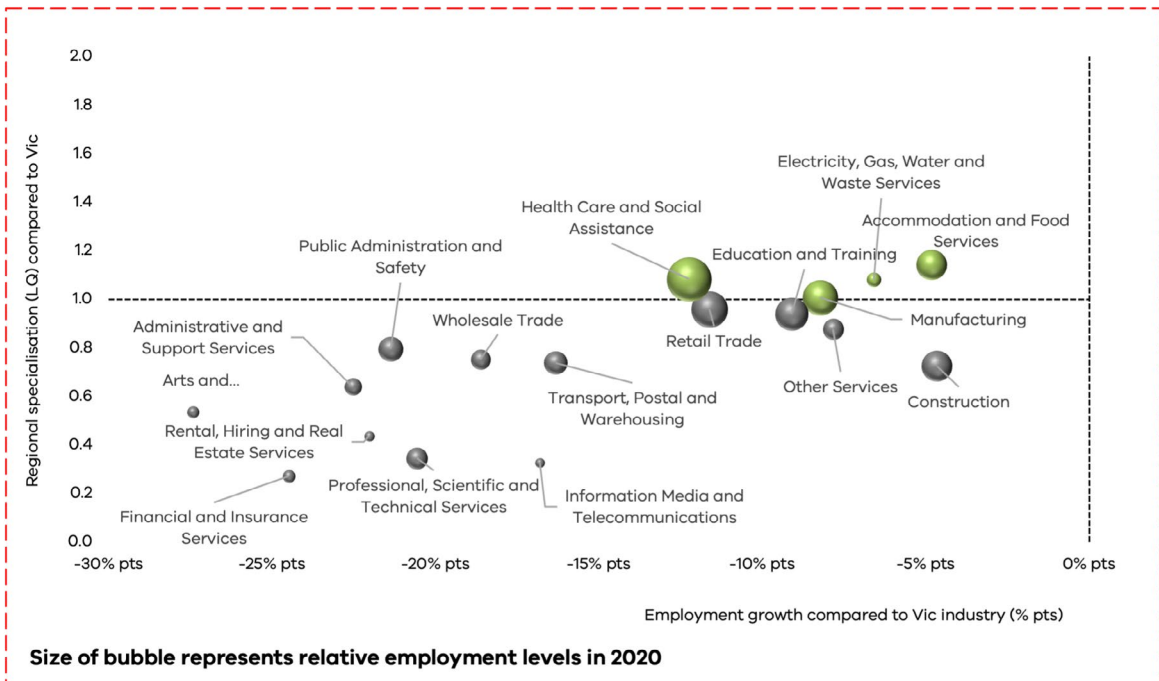
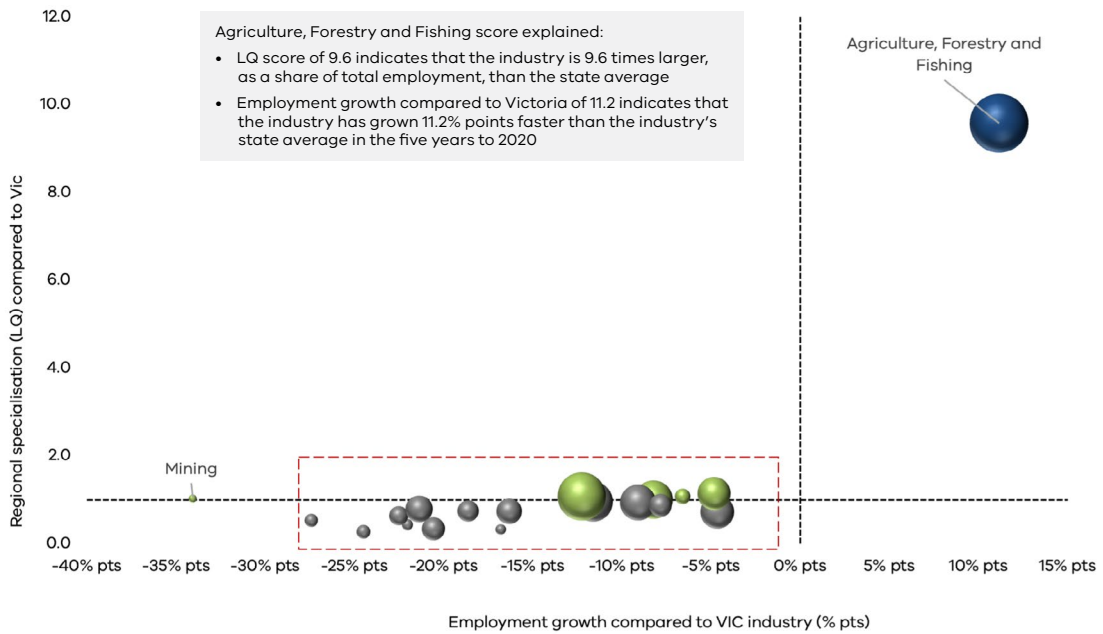
The position on the vertical axis indicates the industry's degree of employment specialisation (location quotient)<sup>1</sup> relative to the Victorian economy. For example, a value of 4.0 means that, as a share of total employment in the local economy, the industry employs four times as many people than the Victorian average<sup>2</sup>. The position on the horizontal axis indicates the difference in each industries' employment growth (2015 to 2020<sup>3</sup>) 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) 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 1.1.1, the region is specialised in Agriculture, Forestry and Fishing. This industry represent over 21 per cent of the region's employment, with Health Care and Social Assistance contributing the next largest share at 14 per cent.

Among subindustries, Agriculture, Forestry and Fishing Support Services, Agriculture, Primary Metal and Metal Product Manufacturing, Food Product Manufacturing, Accommodation, Fuel Retailing Waste Collection, Treatment and Disposal Services Basic Material Wholesaling, Grocery, Liquor and Tobacco Product Wholesaling, Residential Care Services, Hospitals and Preschool and School Education also recorded strong employment specialisation.

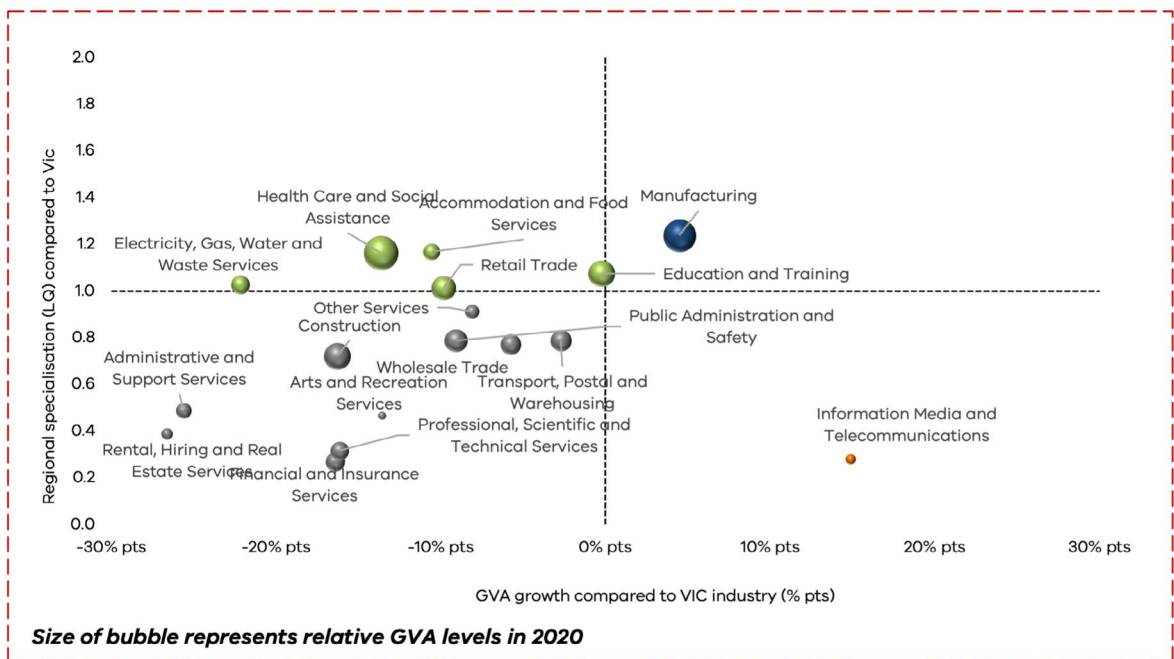
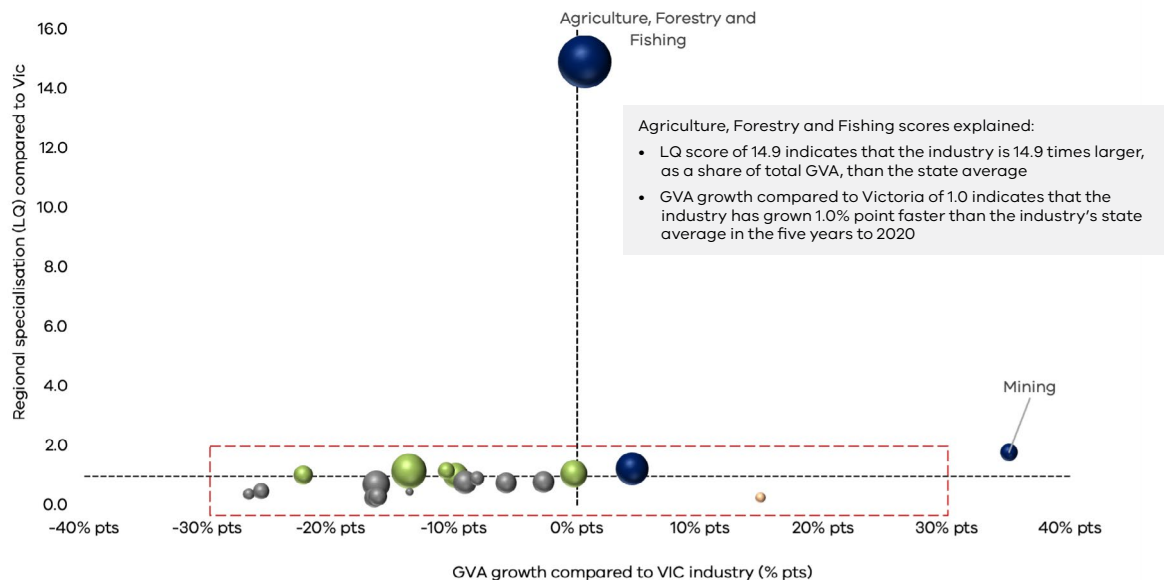
Over the past five years, the region has not seen employment growth outpace the state average in any of its sectors except for the Agriculture, Forestry and Fishing. Among industries which lagged average employment growth for the state, five industries had a LQ score between 1.00 and 1.25. While these 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 and Wholesale Trade. As governments and local leaders plan for the region's future economic direction, it is important to consider Great South Coasts position both within regional Victoria and the state.

## LQ analysis, GVA

Figure 1.1.2 (below) identifies Great South Coasts 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) 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 specialised in Agriculture, Forestry and Fishing, and Mining.

The Agriculture, Forestry and Fishing and Mining industries experienced a rise in GVA compared to the Victorian industry average.

At a subindustry level, the Great South Coast is also specialised in Agriculture, Forestry and Fishing Support Services, Agriculture, Primary Metal and Metal Product Manufacturing, Oil and Gas Extraction, Food Product Manufacturing, Waste Collection, Treatment and Disposal Services, Basic Material Wholesaling, Accommodation, Water Supply, Sewerage and Drainage Services, Fabricated Metal Product Manufacturing, Preschool and School Education, Residential Care Services, Broadcasting (except Internet), Grocery, Liquor and Tobacco Product Wholesaling, Road Transport and Hospitals.

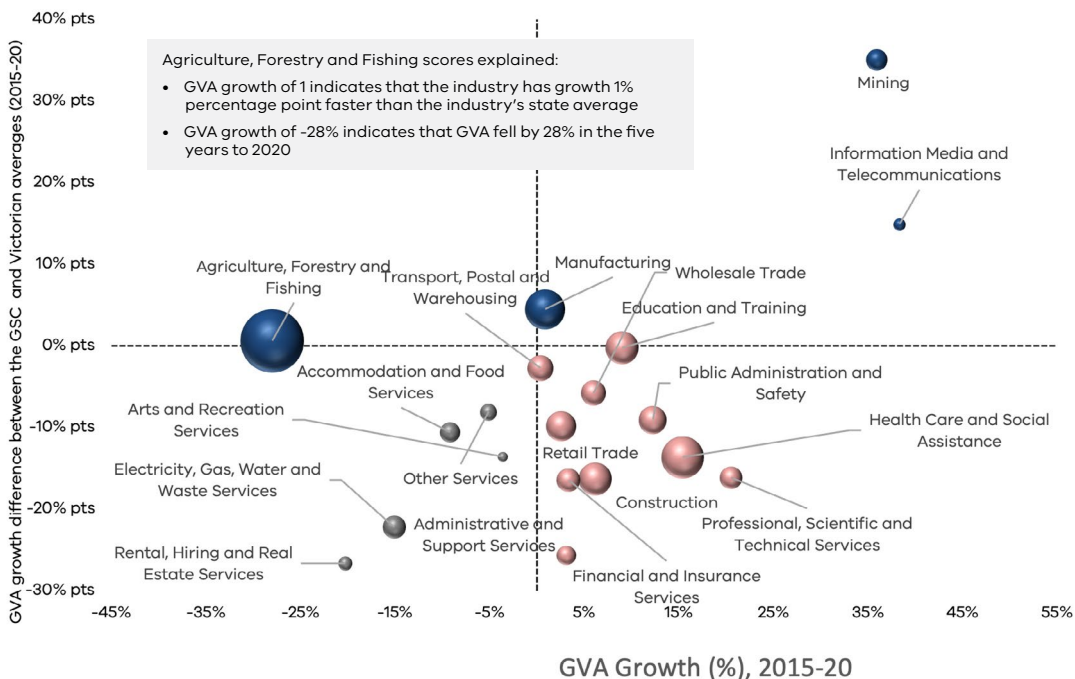
### Shift-Share Analysis

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**



Size of bubble represents relative GVA levels in 2020

(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, four (of 19) industries outperformed the average growth across the state, led by Mining (+35.1% pts). Furthermore, 13 sectors saw overall GVA growth between 2015 and 2020.

The region exhibits further strengths among its subindustries. Over the past five years, Food Product Manufacturing; Preschool and School Education, Basic Material Wholesaling; Waste Collection, Treatment and Disposal Services; Accommodation; Social Assistance Services, Agriculture Forestry and Fishing Support Services and Broadcasting (except Internet) all outperformed the state's average growth rate.

Strong results across a diverse range of sectors indicates the comparative strength of the Great South Coast region. Consistently 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.<sup>4</sup>

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.

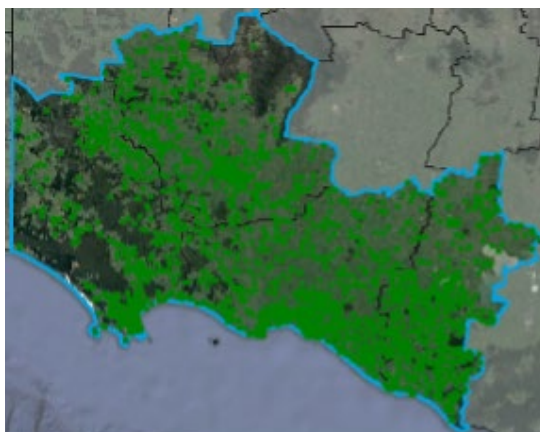
4. Porter, M. (1998). Clusters and the new economics of competition. *Harvard Business Review*, 76 (6), 77–90

**Table 1.1.4: Industry Cluster Analysis**

Sector	LQ (Employment)	LQ (Business count <sup>5</sup> )	Clusters
Agriculture, Forestry and Fishing	14.91	7.6	✓
Mining	1.79	1.7	✓
Manufacturing	1.24	0.8	×
Electricity, Gas, Water and Waste Services	1.03	0.7	×
Construction	0.72	0.7	×
Wholesale Trade	0.77	0.5	×
Retail Trade	1.01	0.8	×
Accommodation and Food Services	1.17	1.0	×
Transport, Postal and Warehousing	0.79	0.5	×
Information Media and Telecommunications	0.28	0.1	×
Financial and Insurance Services	0.27	0.6	×
Rental, Hiring and Real Estate Services	0.39	0.8	×
Professional, Scientific and Technical Services	0.32	0.3	×
Administrative and Support Services	0.49	0.5	×
Public Administration and Safety	0.79	0.7	×
Education and Training	1.08	0.6	×
Health Care and Social Assistance	1.16	0.6	×
Arts and Recreation Services	0.47	0.6	×
Other Services	0.91	0.8	×

(ABS, 2021) (NIEIR, 2020)

The results indicate the Great South Coast has strong clusters in both Agriculture, Forestry and Fishing and Mining industries. The region's rural setting and abundance of prime farming land has led to strong clusters of agriculture businesses supporting beef, dairy and meat production. Additionally, access to the nearby deep-water port in Portland supports the export of both agriculture and mining products.

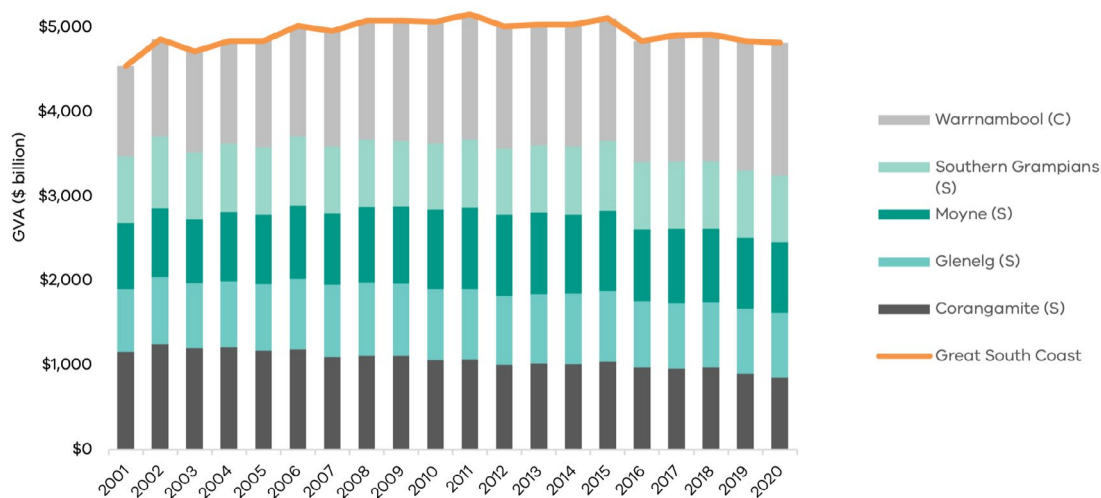
**Figure 1.1.5: Cluster mapping****Agriculture businesses****Mining businesses**

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, GVA in the Great South Coast has remained steady. Between FY2001 and FY2020 GVA grew from \$4.5 to \$4.8 billion (see Figure 11.6). However trends vary at an LGA level. Warrnambool makes up the largest proportion of the region’s GVA, and has grown over the past two decades. Conversely, Corangamite, the second largest contributor to the region’s economic output has seen declines over the same period. This fall reflects declining agriculture values and, in more recent years, declines in oil and gas extraction. Moyne, Glenelg and Southern Grampians have realised no significant change in their contribution to the region’s GVA over the time period.

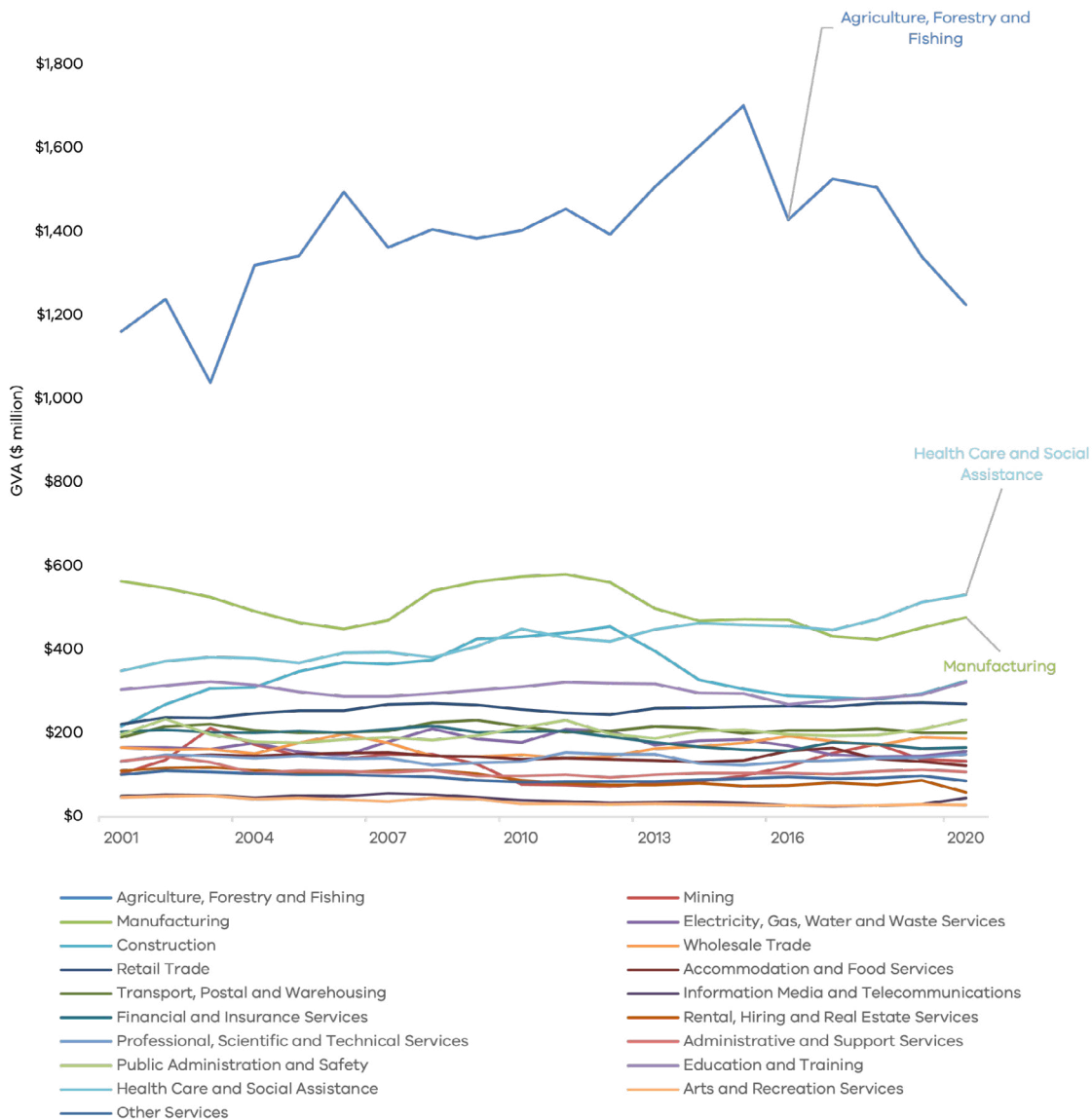
**Figure 11.6: GVA over time by LGA**



(NIEIR, 2020)

Despite fluctuations, Agriculture, Forestry and Fishing has consistently remained the most significant output contributor to the Great South Coast region (see Figure 11.7). It is followed by a Health Care and Social Assistance sector which has seen steady growth since the turn of the century, and a stable and strong manufacturing sector. Construction is the fourth largest contributor to economic output.

**Figure 1.1.7: GVA by industry**

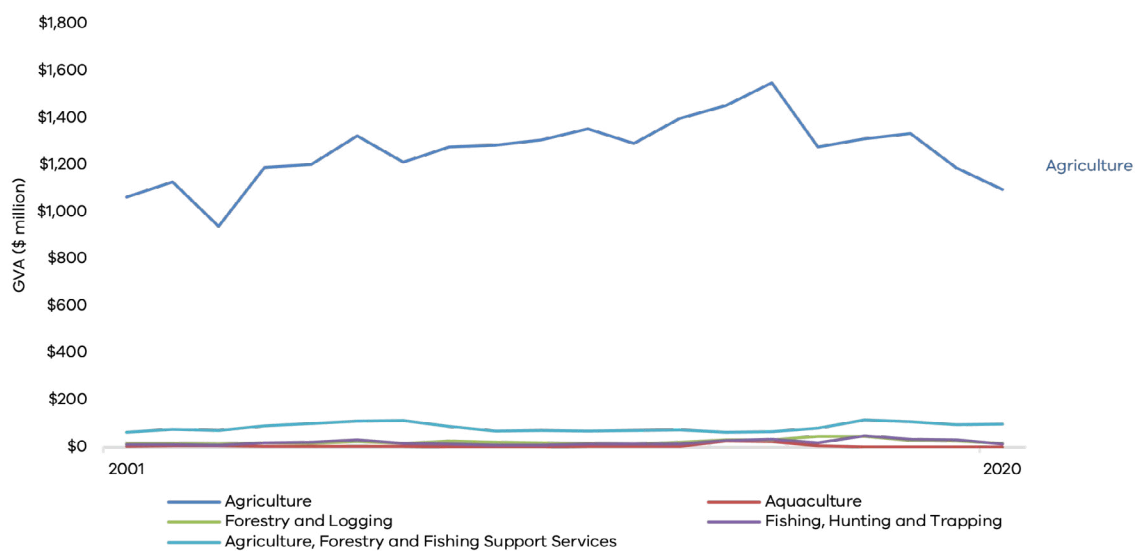


(NIEIR, 2020)

At a subindustry level, Agriculture drives overall trends in Agriculture, Forestry and Fishing. The region’s strength in agriculture is due to its excellent natural endowments, economies of scale and density and is supported by its strong food processing sector and emerging live export market. The sector’s volatility is explained by its dependence on weather conditions. The region is also home to a stable support services subindustry (see Figure 1.1.8).



**Figure 1.1.8:** Agriculture, Forestry and Fishing GVA

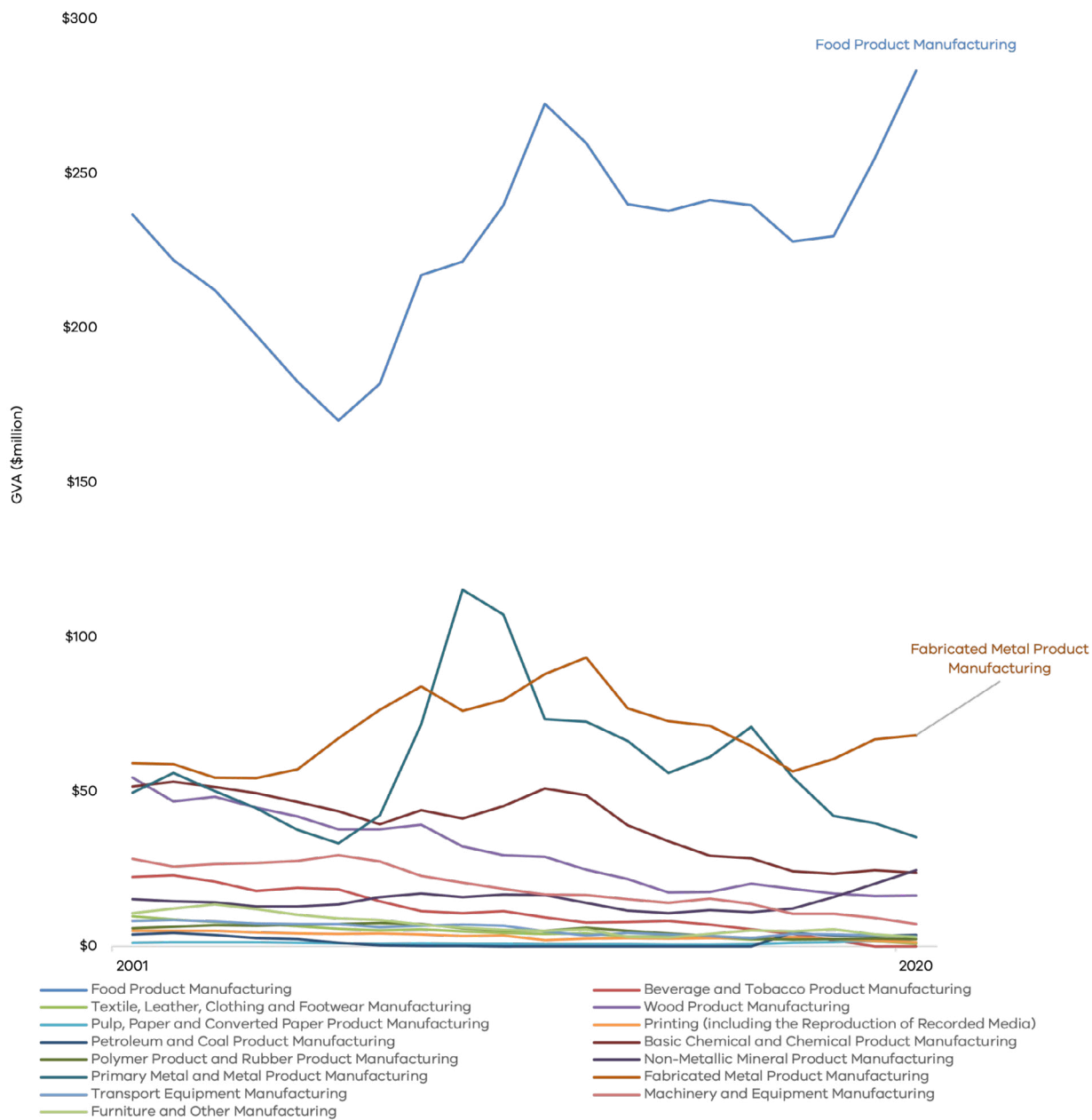


(NIEIR, 2020)

The region has consolidated its strong Food Product Manufacturing base and has realised strong growth over the past ten years (see Figure 1.1.9).

Primary Metal and Metal Product Manufacturing experienced significant growth between FY2007 and FY 2009. Since FY2010, the subindustry has been in decline however it remains a significant sector for the region. While Fabricated Metal Product Manufacturing has remained a strong manufacturing sector for the region throughout.

**Figure 1.1.9: Manufacturing GVA**

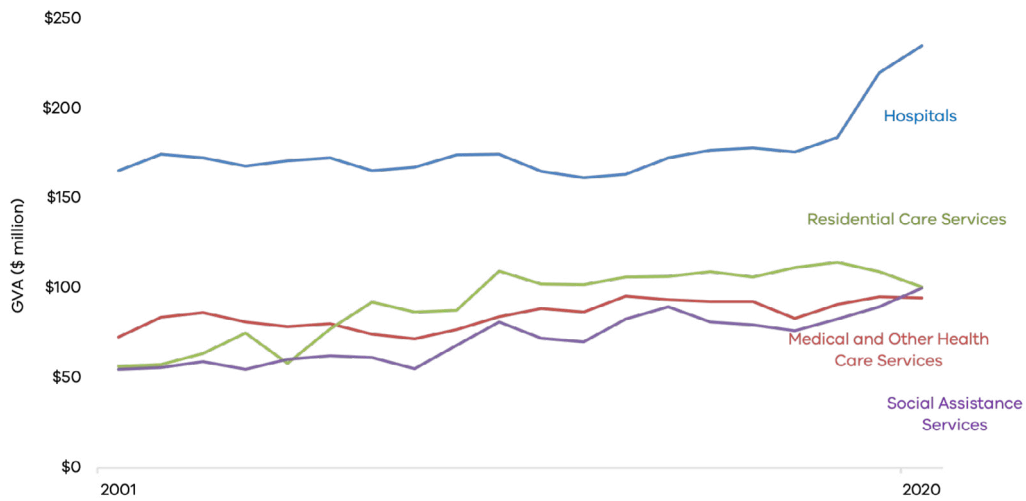


(NIEIR, 2020)



Consistent with trends across the state, all Health Care and Social Assistance subindustries have seen strong growth over time, partially explained by population and demographic changes. In particular, there have been substantial increases in the Hospitals subindustry in recent years (see Figure 1.1.10).

**Figure 1.1.10: Health Care and Social Assistance GVA**



(NIEIR, 2020)



## Business growth

Over the past five years, more than 2,000 new businesses have established themselves in the Great South Coast region, mostly concentrated around Warrnambool, Hamilton, and Portland.

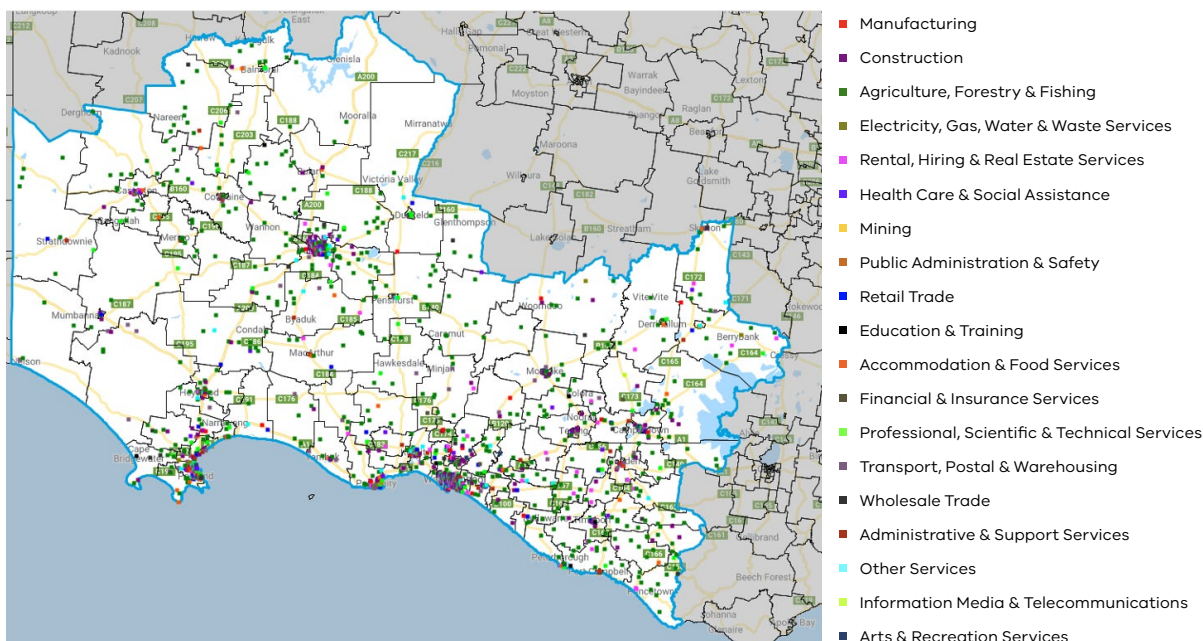
By industry, nearly 30 per cent of these businesses were in the Agriculture, Forestry and Fishing sector, reflecting the region’s strong history in agriculture production and continued opportunities for growth. At a subindustry level, over 320 agricultural businesses were in Sheep, Cattle and Dairy Farming and a further 174 businesses in Sheep and Beef Cattle Farming, Grain Farming and Agriculture and Fishing Support Services.

Other industries of significant business growth are:

- Construction (270 new businesses),
  - Electrical Services (44 new businesses)
  - Site Preparation (37 new businesses), and
  - House Construction (34 new businesses),
- Transport, Postal and Warehousing (157 new businesses),
- Accommodation and Food Services (145 new businesses), and
- Professional, Scientific and Technical Services (141 new businesses).

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

**Figure 1.1.11: Business Entries (September 2015 to September 2020)**



Source: (REMPPLAN, 2021)

## International Exports<sup>6</sup>

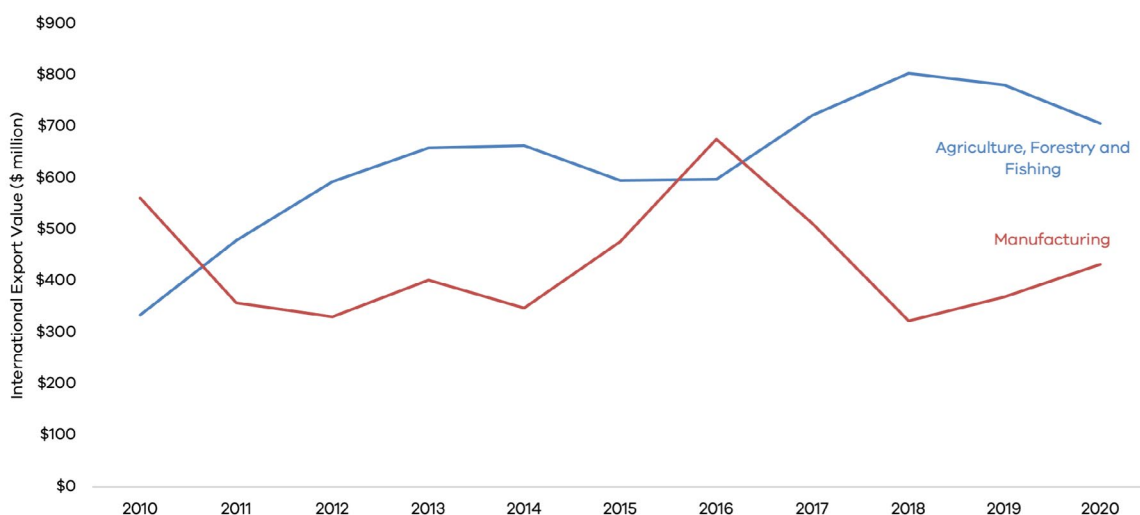
The deep-water Port of Portland provides the region's producers with ready access to international markets. Driven by Agriculture, Forestry and Fishing, and a strong Manufacturing industry, export volumes have slowly increased over the past decade across the region from \$1.1 billion in 2010 to \$1.4 billion in 2020.

Representing 52.2 per cent of total value in 2020, Agricultural, Forestry and Fishing products are driving growth, peaking at \$803.4 million in value in 2018 (see Figure 1.1.12). Dairy, beef and sheep are the region's most valuable commodities. 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 sheep and beef markets. Wool, and forestry and logging products are also valuable export commodities for the region. Agricultural export value has declined since 2018 due largely to the impact of 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 roundwood timber, and associated challenges for abattoirs to resume trade following a COVID-19 induced pause.

Manufacturing is the region's second largest export industry; contributing \$432.4 million in value in 2020. The fluctuating value of the industry reflects the varying international export value of primary metal and metal products. Traditionally the backbone of the region's exports, performance has become variable in line with the international aluminium price. In 2016, the subindustry contributed \$420.8 million in value but only \$86.6 million in 2020. In its place, the region supports a growing Food Product Manufacturing sector, worth \$288.0 million in 2020. The region is serviced by food processing centres in Warrnambool, Camperdown, Cobden, Portland, Hamilton and Koroit.

The two major sectors comprised 84.1 per cent of total export value in 2020. Other smaller but relatively significant sectors are Accommodation and Food Services (worth \$57.8 million in export value in 2020), Wholesale Trade (worth \$37.4 million) and Education and Training (worth \$28.9 million).

**Figure 1.1.12: International Export Value, Key Industries**



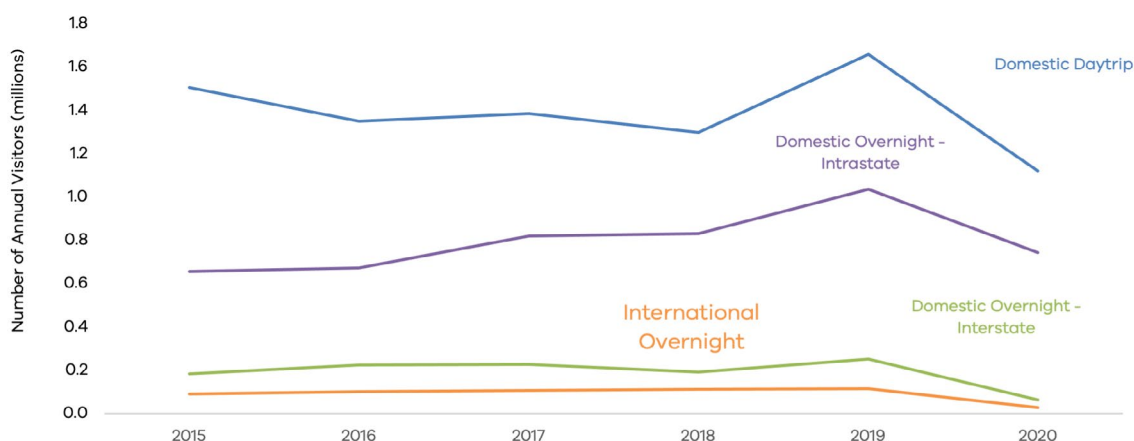
Sources: (NIEIR, 2020)

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

## Visitor Economy

The region's various attractions, including the Great Ocean Road and Budj Bim Cultural Landscape, make tourism a significant contributor to the regional economy. Prior to COVID-19, visitor numbers and expenditure had fluctuated but peaked in 2019 (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 significantly impacted the region's visitor economy. The total number of domestic daytrips, and domestic and international overnight visitors fell from 3.1 million in 2019 to 2.0 million in 2020. This decline led to a fall in total visitor expenditure; from \$706 million in 2019 to \$622 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)<sup>7</sup>**



Source: (Tourism Research Australia, 2021a)

The number of international and domestic interstate overnight visitors has fallen by 75.3 per cent and 74.6 per cent respectively, more than double the declines in domestic day-trippers (32.4 per cent) and domestic intrastate visitors (28.1 per cent). However, since these visitors only represented 12.0 per cent of visitors in 2019, the impact of these declines has been much lower than other parts of regional Victoria.

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

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 1.1.4: Visitation & Average Spend (2019 – 2020)<sup>8</sup>**

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
<b>Domestic Daytrip</b>	1,659,000	1,122,000	\$104	\$132
<b>Domestic Intrastate Overnight</b>	1,037,000	745,000	\$351	\$557
<b>Domestic Interstate Overnight</b>	252,000	64,000	\$477	\$781
<b>International Overnight</b>	115,000	29,000	\$419	\$353

Source: (Tourism Research Australia, 2021a)

Beyond these four major categories of visitation, the region also previously received substantial international day-trippers to the Great Ocean Road and/or Twelve Apostles. Particularly important for Corangamite Shire, an estimated 801,600 international day-trippers visited the Great Ocean Road/Twelve Apostles in 2019. With 243,200 international tourists to the destination staying a night, day-tripping has been the more popular form of visitation. Total international visitation to the destination fell to 195,500 visitors in 2020 and it is unlikely that these types of visitors are going to return in the short-term. Unlike other parts of regional Victoria, the Great Ocean Road relies disproportionately on 'holiday makers' as opposed to visitors travelling to see friends or relatives, or for business. To replace the international visitation shortfall, efforts are required to encourage first-time domestic tourists and/or create incentives for past tourists to return.

Most businesses which service visitors are small enterprises. In 2019, there was 1,238 tourism businesses across the region. Of these, 70.8 per cent have four employees or fewer, with 35.3 per cent sole proprietors. Just 4.6 per cent of businesses have 20 or more employees.

**Table 1.1.5: Average Number of Tourism Businesses (2016–2019)**

Local Government Area	Tourism Businesses
<b>Corangamite</b>	188
<b>Glenelg</b>	226
<b>Moynes</b>	192
<b>Southern Grampians</b>	198
<b>Warrnambool</b>	434
<b>Total</b>	1,238

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, the Great South Coast region has realised slow population growth and an increasingly ageing population. Notwithstanding the impacts of COVID-19, these trends had been expected to continue and will present challenges for the region.

- Between 2019 and 2020, the most important contributor towards the region's population growth was the inflow of overseas migrants.
- Regional growth has been driven by Warrnambool and, to a lesser extent, Moyne LGAs. The three remaining LGAs (Corangamite, Glenelg and Southern Grampians) have experienced population 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.

The region is experiencing an outflow of local residents to other parts of Australia, particularly among younger cohorts (15 to 24 years and 25 to 44 years).

- The outflow of young people (15 to 24 years) is consistent with trends observed across regional Victoria however, the outflow of people at the age where people tend to start families and are often in the early to middle parts of their careers (25 to 44 years) is contrary to the usual regional experience.
- While the region experiences a net inflow of those aged 45 to 64 years, the inflow is not sufficiently large to offset the outflow of the other working age cohorts.

## Population and population growth

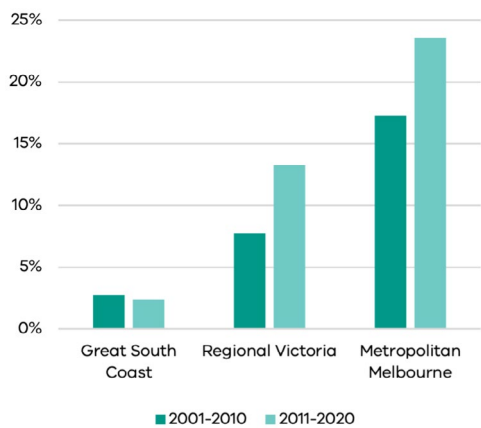
In 2020, the Great South Coast was home to an estimated resident population of 104,244 people. 35,533 (34 per cent) of these lived in Warrnambool, 19,621 (19 per cent) in Glenelg Shire, 17,027 (16 per cent) in Moyne Shire, 16,134 (15 per cent) in Southern Grampians Shire and 15,929 (15 per cent) in Corangamite Shire.

The Great South Coast’s population increased by 2.7 per cent between 2001 and 2010 and by 2.4 per cent between 2011 and 2020. Over the past ten years, the region’s growth is approximately one fifth of the growth realised across regional Victoria and one tenth of the growth realised in metropolitan Melbourne (see Figure 1.2.1). The region’s underperformance is partly explained by Great South Coast’s relative remoteness. Where some other regions benefit from proximity to metropolitan Melbourne and the growing peri-urban fringe, the Great South Coast is not realising the same inflow of people seeking a regional lifestyle while remaining within commuting distance of Melbourne.

The Great South Coast’s population was forecast to continue to grow at a subdued pace, however, the impacts of COVID-19 on domestic and international migration is likely to alter previous forecasts (see Figure 1.2.2).

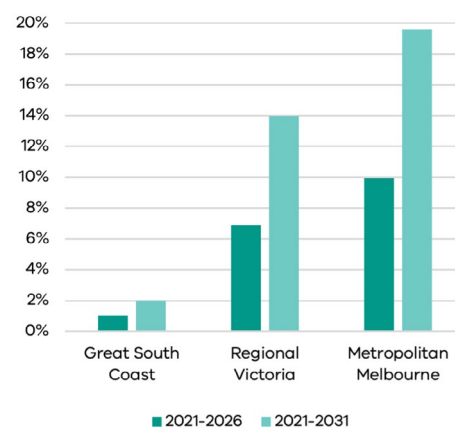
There is significant variation in population growth by LGA (see Figure 1.2.3). While Warrnambool and Moyne Shire populations have steadily grown, the populations of Corangamite, Glenelg and the Southern Grampians slightly declined between 2000 and 2020. Prior to COVID-19 population growth was expected to be driven by continued growth in Warrnambool and Moyne, with the other LGAs expected to realise slight declines into the future.

**Figure 1.2.1: Population Growth**



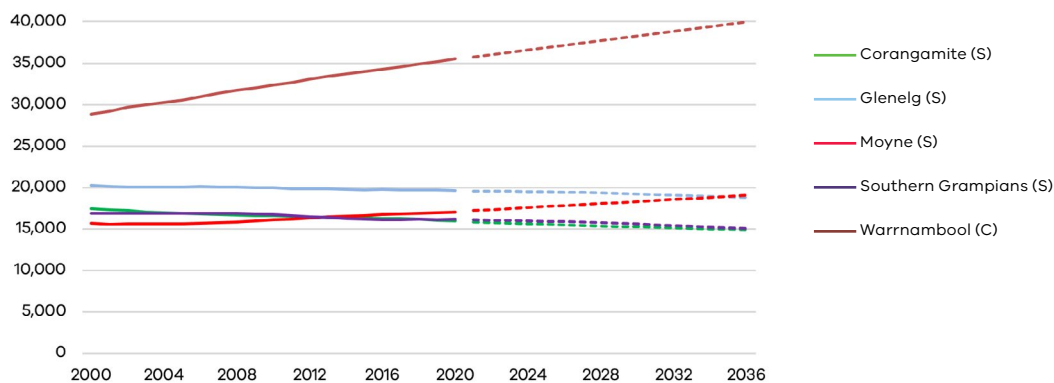
Source: (Australian Bureau of Statistics (ABS), 2020a)

**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)

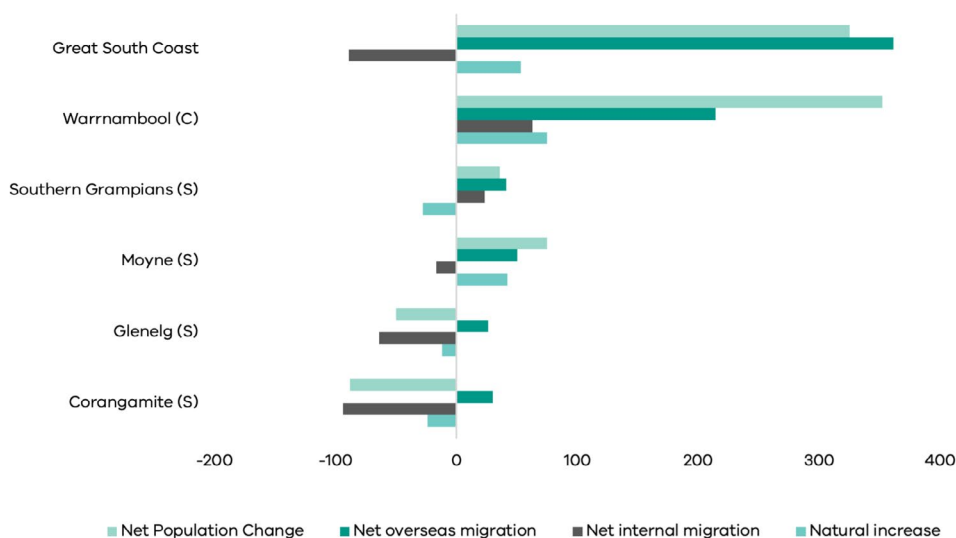
## Components of population change

Between 2019 and 2020, population growth in the Great South Coast was driven by net overseas migration (NOM) and, to a lesser extent, by natural increases. Conversely, the region experienced a number of local residents leaving (negative net internal migration (NIM)) (see Figure 1.2.4).

The rural LGAs of Corangamite and Glenelg lost more people to domestic emigration than they gained in overseas immigration and as such, experienced population decline. Corangamite's decline is exacerbated by natural decrease, a trend symptomatic of ageing populations.

Population growth across the region is diverse. 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)**

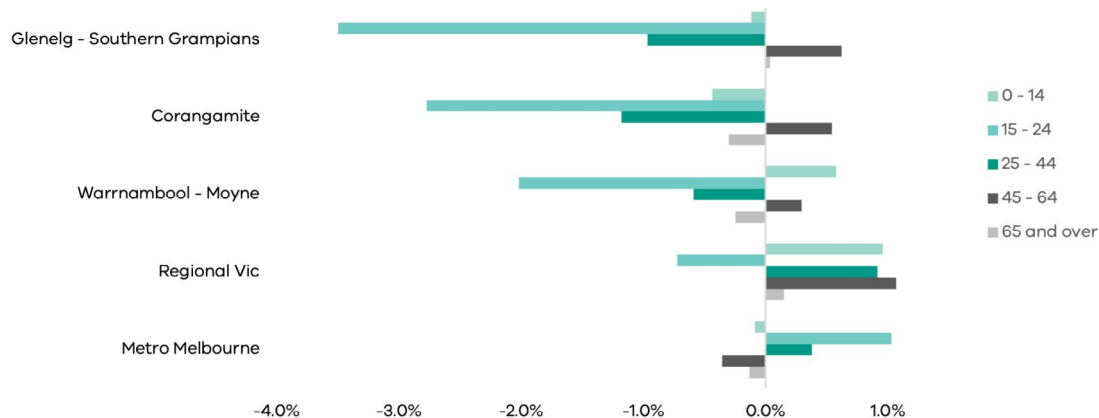


Source: (ABS, 2021)

## Regional internal migration

Annual internal migration data indicates that the key driver of negative net internal migration is younger people (15 to 24 years and 25 to 44 years age cohorts) leaving the region (see Figure 1.2.5). Outmigration among the 15 to 24 years age cohort is a consistent pattern across regional Victoria and is likely to indicate the relatively lower availability of education, training, and employment opportunities. However, where regional Victoria typically gains from an in migration in the 25 to 44 years cohort, these young families and professionals are leaving the Great South Coast. While all parts of the region receive an inflow of those aged 45 to 64 years, numbers are insufficient to offset declines among younger age-groups. These domestic migration trends subdue the growth of the region's population, particularly those of working age.

**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.

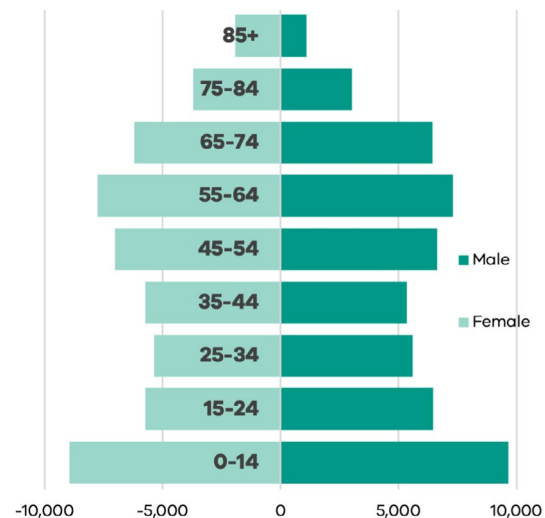
Note: the ABS time series of internal migration is broken at 2016 to align with new statistical regions. 2016-18 insights are consistent with the movements represented in previous statistical regions where alignment is possible.

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

The Great South Coast’s population is 50.4 per cent female and 49.6 per cent male. With a median age of 44 years, the Great South Coast is older than the median in regional Victorian (42 years) and significantly older than that of metropolitan Melbourne (36 years). The working aged population (15 to 64 years) represents 60.6 per cent of the population and 21.6 per cent of the population are 65 years or older. Since younger people are leaving the region and those in the latter stages of their careers are moving to the region, the proportion of older residents is predicted to increase (see Figure 1.2.6).

**Figure 1.2.6: Population by Age**

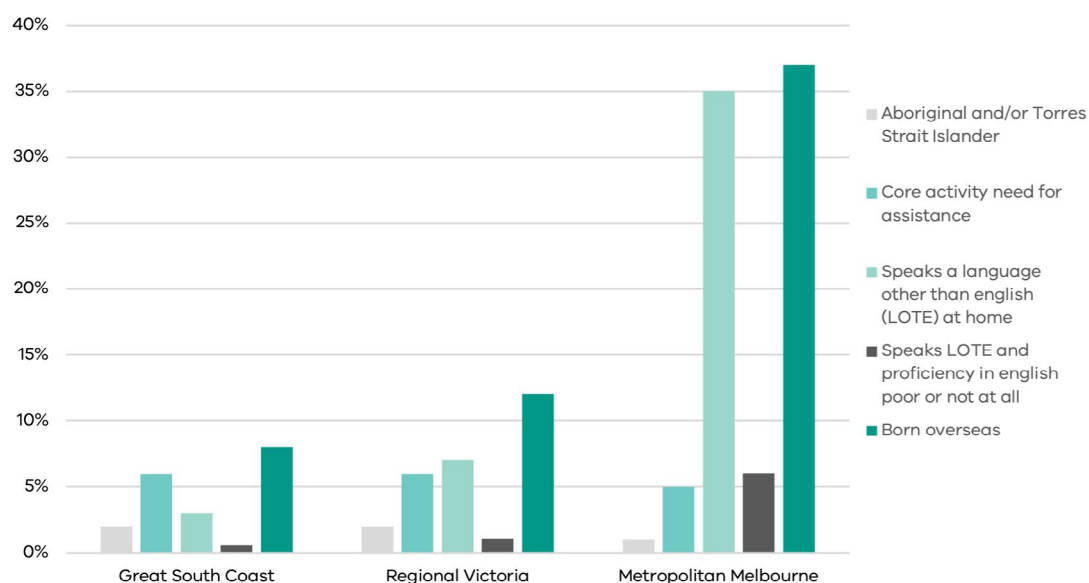


Source: (ABS, 2020c)



1.6 per cent of the regions' population are Aboriginal and Torres Strait Islander, while 6.1 per cent live with a disability. These proportions are consistent with regional Victorian averages but higher than the metropolitan Melbourne average. The Great South Coast has a relatively low proportion of culturally and linguistically diverse (CALD) residents; only 3.1 per cent speak a language other than English at home, 0.6 per cent of people who speak a second language and have low to no proficiency in English, and 8.2 per cent of residents are born overseas. These cohorts comprise a smaller proportion of the region's population than both the regional Victorian and metropolitan Melbourne averages (Figure 1.2.7).

**Figure 1.2.7: Population Cohorts**



Source: (ABS, 2016a)

### 1.3 Socio-Economic Profile

Despite overall slow growth in employment and economic output, there is significant intra-regional disparity across geographies and population cohorts.

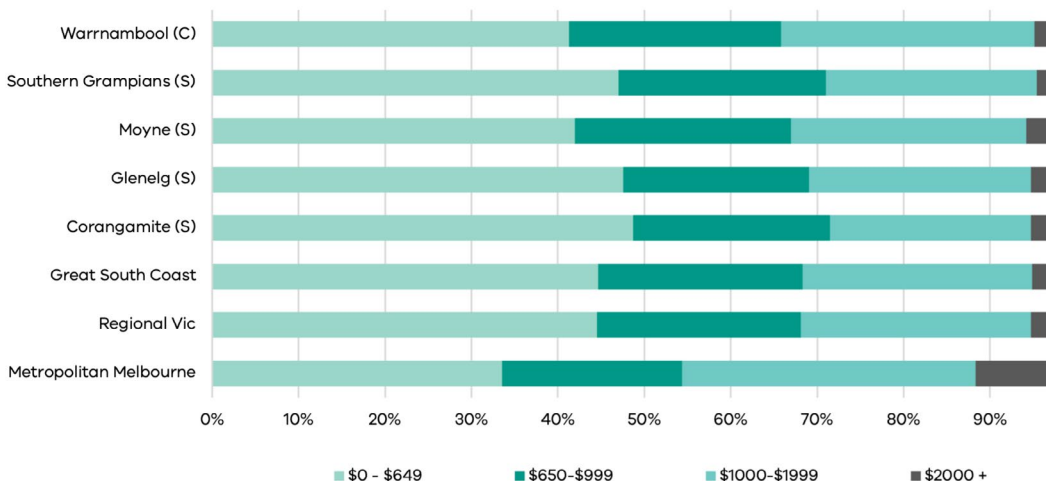
- As it relates to household incomes, socio-economic disadvantage and educational attainment, the Great South Coast tends to underperform regional Victorian averages.
- While Warrnambool and Moyne LGAs tend to be relatively well off, Glenelg, Corangamite and, to a lesser extent, Southern Grampians tend to underperform the region across socio-economic measures.
- Aboriginal and Torres Strait Islanders have poorer outcomes across labour force engagement and income measures in comparison to general population rates in Great South Coast.

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

#### Income

Relative to regional Victoria, the Great South Coast has similar household income distribution; 32 per cent of households earn more than \$1,000 per week, which is consistent with the regional Victorian average but significantly below that of metropolitan Melbourne (46 per cent). Moreover, 45 per cent of households are low income (earning less than \$650 per week). Again, this rate is consistent with the regional Victoria average but significantly underperforms metropolitan Melbourne (34 per cent). There is significant income variation within the region; Warrnambool and Moyne have relatively high- income distributions whereas the Southern Grampians, Glenelg and Corangamite have relatively lower income distributions.

**Figure 1.3.1: Household Income Distribution (Weekly)**



Source: (ABS, 2016b)

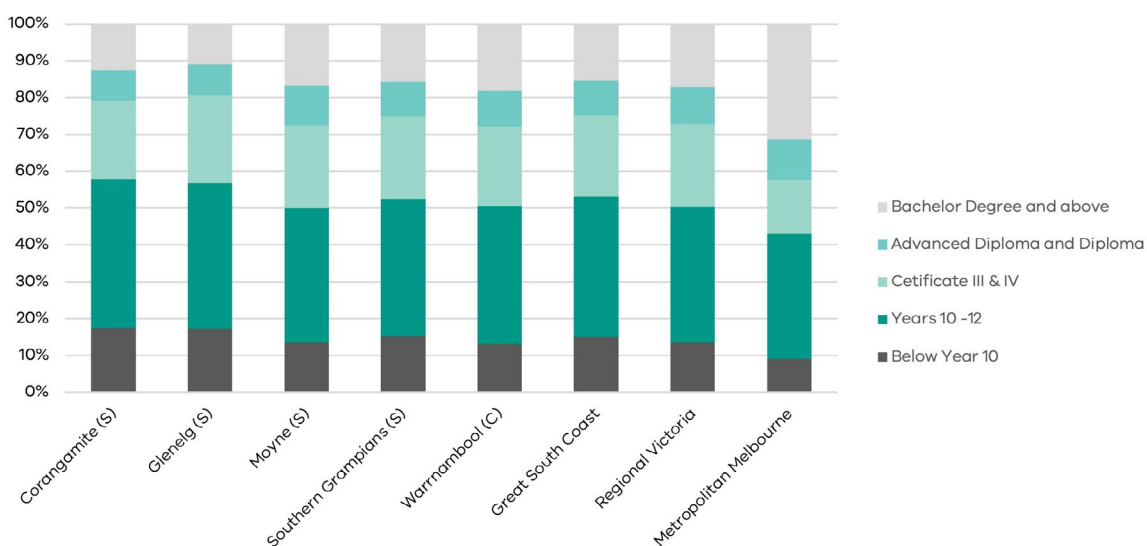


## Education attainment

Broadly speaking, educational attainment in the Great South Coast is slightly lower than regional averages (see Figure 1.3.2); 15 per cent of residents did not progress to Year 10, compared with 14 per cent for regional Victoria and 9 per cent in metropolitan Melbourne. Meanwhile, 15 per cent of residents have a bachelor’s degree or a higher qualification, slightly below the regional Victorian average (17 per cent) and significantly lower than metropolitan Melbourne (31 per cent). The region’s pattern reflects both the access to education institutions and the qualification levels required for many of the major employing industries in the region, namely Agriculture, Manufacturing, Construction and emerging Health Care and Social Assistance. Furthermore, the region’s relative remoteness limits its ability to attract and retain skilled workers who require greater connectivity to metropolitan Melbourne or other urban centres for work.

There is substantial intra-regional variation. For example, a significant proportion of Corangamite and Glenelg residents do not progress beyond secondary school whereas a greater proportion of Warrnambool and Moyne residents have a bachelor’s degree.

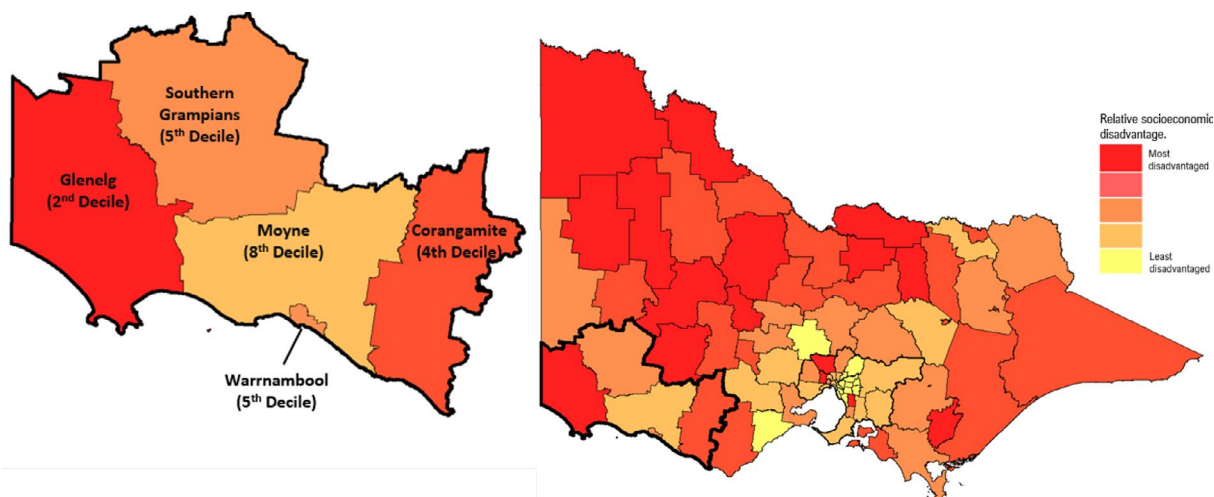
**Figure 1.3.2: Educational Attainment (Highest Level)**



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 the Great South Coast; Moyne has a relatively low disadvantage score, while Southern Grampians and Warrnambool are around the state median. Corangamite has slightly above average levels of disadvantage, while Glenelg is well above average. With the exception of Moyne, all LGAs in Great South Coast, realised a deterioration in their relative level of disadvantage between 2011 and 2016 (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	
Glenelg (S)	12	2	19	3	▲
Corangamite (S)	28	4	34	5	▲
Warrnambool (C)	34	5	37	5	▲
Southern Grampians (S)	37	5	41	6	▲
Moyne (S)	58	8	56	7	▼

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<sup>9</sup>

Table 1.3.6 (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.

With a 17.7 per cent unemployment rate, Aboriginal and Torres Strait Islanders are more than three times as likely to be unemployed.

The labour force participation rate among Aboriginal and Torres Strait Islanders (57.7 per cent) is more than five percentage points lower than the regional average. Aboriginal and Torres Strait Islander households are more likely to earn less than \$650 per week (57.0 per cent) than average (43.9 per cent).

Furthermore, 20.9 per cent of Aboriginal and Torres Strait Islander youth in the Great South Coast are not engaged in work or study. This is significantly higher than the average rate of 10.6 per cent.

9. Cohort 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	Great South Coast
Economic performance	Labour force participation rate (%)	64.5% ■	60.9% ■	65.8% ■	62.8% ■
	<i>Aboriginal and Torres Strait Islander Victorians</i>	57.8% ■	52.8% ■	62.4% ■	57.7% ■
	Unemployment rate (%)	6.6% ▲	5.9% ▲	6.8% ▲	4.8% ▲
	<i>Aboriginal and Torres Strait Islander Victorians</i>	13.9% ■	16.5% ■	11.8% ■	17.7% ▼
Disadvantage and shared prosperity	Households earning less than \$650 per week (2016 dollars) (%)	34.8% ▼	43.1% ▼	31.8% ▼	43.9% ▼
	<i>Aboriginal and Torres Strait Islander households</i>	47.7% ▼	56.6% ▼	39.2% ▼	57.0% ▼
	Children in jobless households (%)	16.4% ■	16.5% ■	16.3% ■	13.6% ■
	<i>Aboriginal and Torres Strait Islander children in households</i>	36.3% ▼	40.9% ▼	31.4% ▼	
Cohesive and liveable communities	People aged 15+ who volunteer (%)	20.9% ▲	26.7% ▲	18.9% ▲	32.2% ▲
	<i>Aboriginal and Torres Strait Islander Victorians</i>	19.9% ▲	19.5% ▲	20.3% ▲	25.8% ▲
Skills and education	People aged 15–24 not engaged in work or study (%)	8.6% *	11.3% *	7.9% *	10.6% *
	<i>Aboriginal and Torres Strait Islander Victorians</i>	21.7% *	25.0% *	18.6% *	20.9% *

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

With nearly 80 per cent of the region’s workforce spread across seven industries, the Great South Coast’s employment is relatively concentrated.

- Agriculture, Forestry and Fishing, Health Care and Social Services, and Retail Trade are the highest employing industries.
- Over the past 10 years, employment has only grown in three (of 19) of the largest employing industries (Agriculture, Education, and Health Care).
- The region has the highest proportion of part-time workers, revealing an opportunity to increase economic activity via increased hours worked by the existing workforce.

Despite challenges, the region has outperformed regional Victoria in certain employment measures.

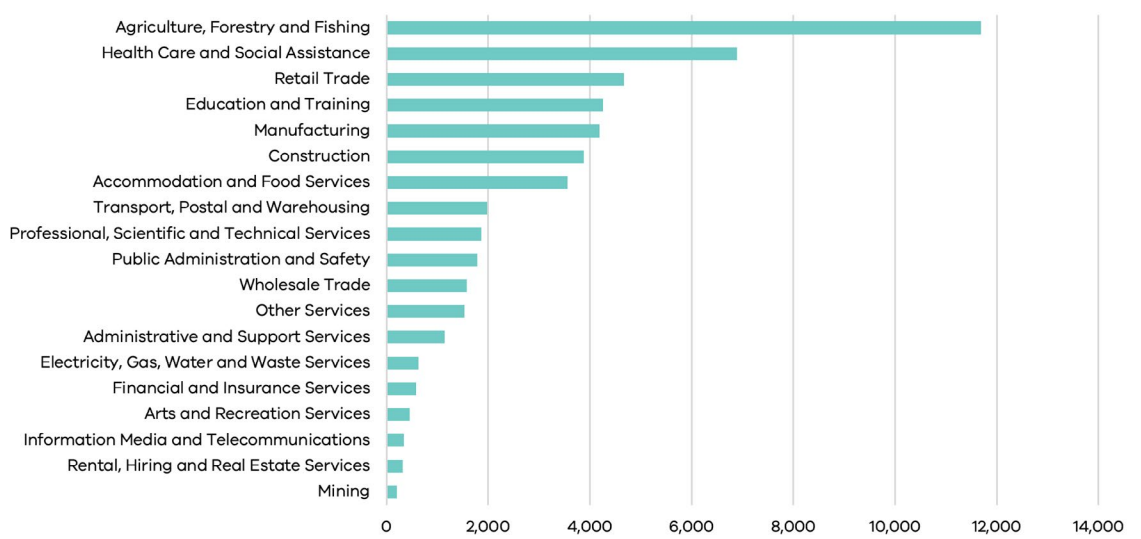
- While there are intra-regional disparities, the Great South Coast has a lower unemployment rate and higher labour participation rate than average rates across regional Victoria.
- In contrast, labour productivity has steadily declined and among Regional Partnership regions, the region has the highest proportion of workers working part-time.

Across Glenelg, Southern Grampians, Warrnambool and Corangamite municipalities, local jobs tend to be filled by local workers and local workers tend to work within their LGA of residence. In comparison, Moyne LGA is more likely to exhibit commuting in and out of the municipality.

### Employment<sup>10</sup>

In 2020 there were 51,600 employed persons (see Figure 1.4.1) in the Great South Coast. Agriculture, Forestry and Fishing (11,687 workers) was the largest employing sector, followed by Health Care and Social Assistance (6,897 workers) and Retail Trade (4,669 workers). The top seven employing industries account for almost 80 per cent of the region’s workforce. Agriculture, the largest employing subindustry within Agriculture, Forestry and Fishing, contributes to over 18 per cent of total employment in the region (see Figure 1.4.2).

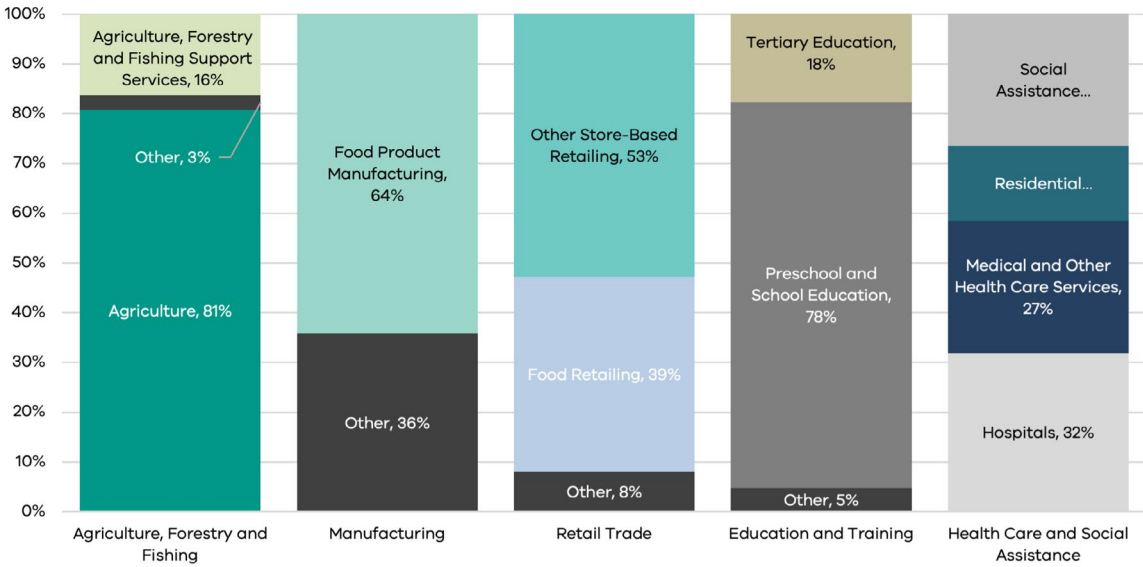
**Figure 1.4.1: Employment by Industry**



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.

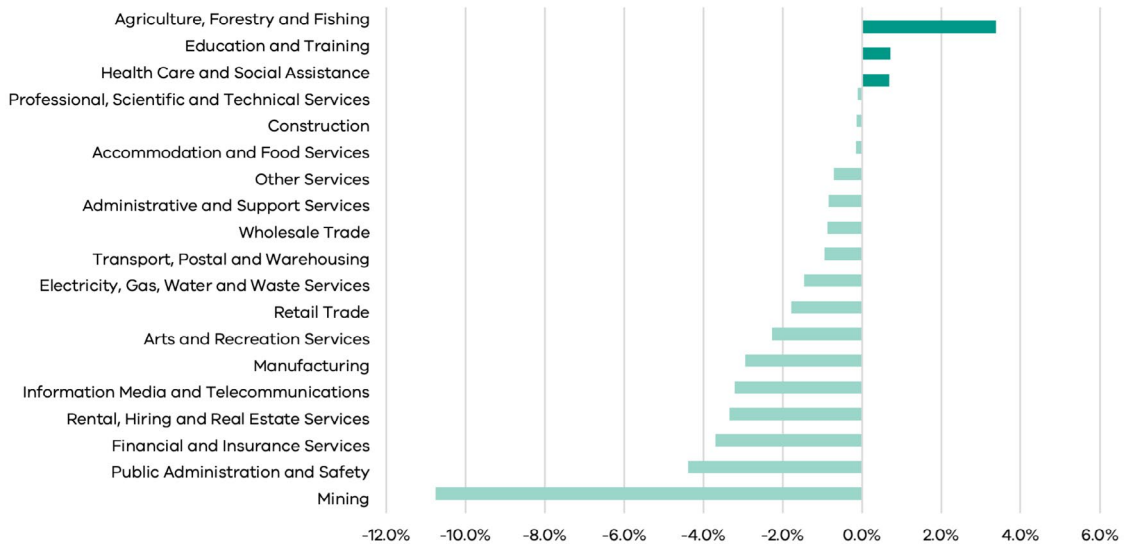
**Figure 1.4.2: Subindustry Employment (Proportion of Top 5 Industries)**



Source: (NIEIR, 2020)

Over the past ten years, employment has grown by an average annual rate of 0.2 per cent. This growth is lower than regional Victoria (1.0 per cent) and metropolitan Melbourne (2.1 per cent). Among the 19 industries, only three have experienced an increase in the number of workers; Agriculture, Forestry and Fishing, Education and Training, and Health Care and Social Assistance (see Figure 1.4.3).

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

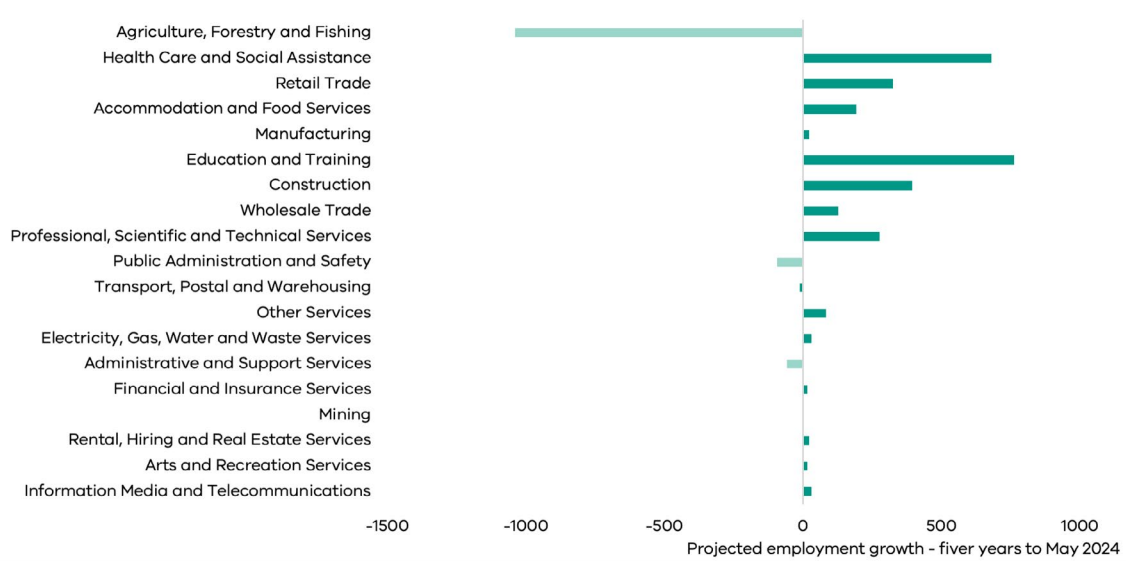


Source: (NIEIR, 2020)



Pre-COVID employment projections (see Figure 1.4.4) forecast employment to increase by 1.8 per cent over the next five years. This growth had been predicted to be driven by Health Care and Social Assistance, and Education and Training. The largest fall in employment had been expected to be realised in the Agriculture, Forestry and Fishing industry, due to the increasing nature of Agriculture transitioning to be more capital intensive and less labour intensive. However, due to the significant disruptions caused by COVID-19, employment outcomes will now significantly differ from those previously forecast.

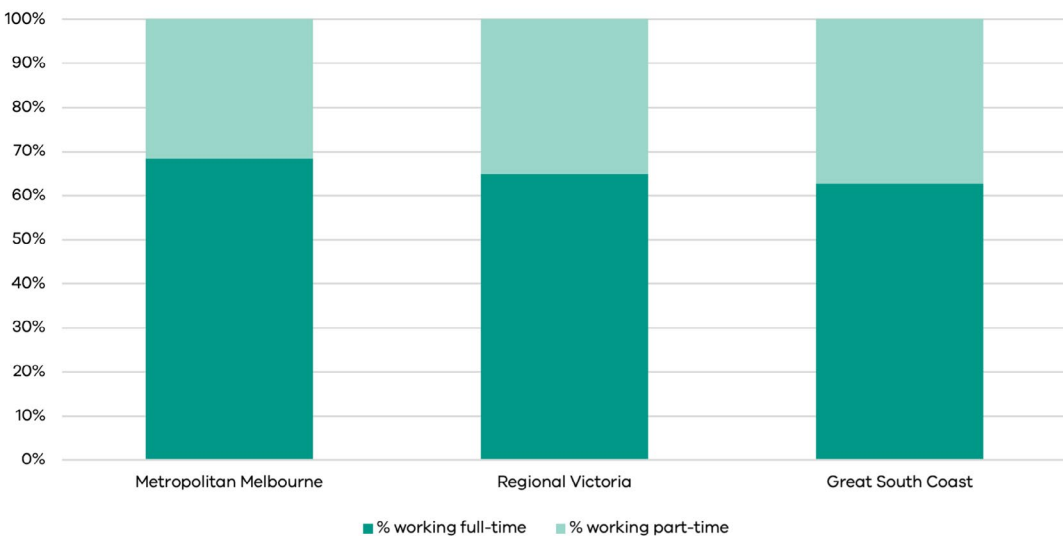
**Figure 1.4.4: Projected Change in Employment, Warrnambool & South-West SA4, 2019–2024**



Source: (National Skills Commission, 2020)

In the Great South Coast, 37 per cent of the workforce works part-time (see Figure 1.4.5). This rate is the highest among Regional Partnership regions, exceeding the regional average (35 per cent) and that of metropolitan Melbourne (32 per cent).

**Figure 1.4.5: Composition of Employment (2020)**



Source: (NIEIR, 2020)

## Unemployment rate

Over the past ten years, the unemployment rate in the Great South Coast has been considerably lower than that of regional Victoria and metropolitan Melbourne (see Figure 1.4.6).

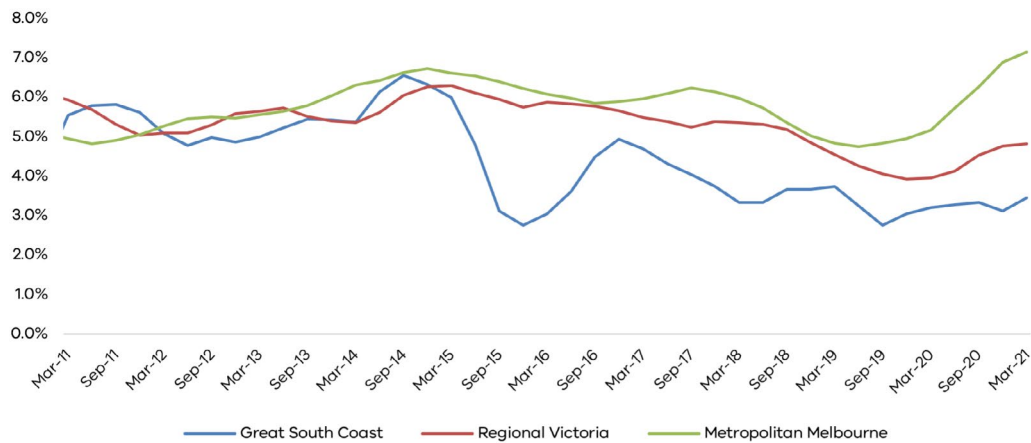
Prior to the onset of the COVID pandemic (March quarter 2020), the unemployment rate in the region was 3.2 per cent. This was below the unemployment rate in regional Victoria (3.9 per cent), and metropolitan Melbourne (5.2 per cent).

The region's long-term average unemployment rate (December Qtr 2010 to March Qtr 2021) is 4.4 per cent; significantly below that of regional Victoria (5.3 per cent) and metropolitan Melbourne (5.8 per cent).

Unemployment rate estimates since COVID have seen the unemployment rate in the region fall to 3.4%, well below the regional average of 4.8%.

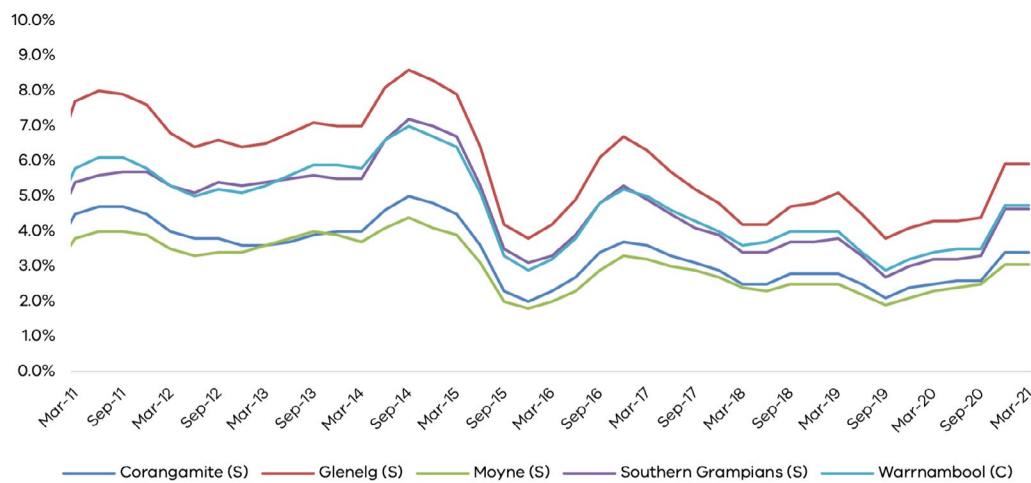
Trends in unemployment over time have been relatively consistent across municipalities, as Glenelg maintained the region's highest level of unemployment and Moyne and Corangamite the lowest.

**Figure 1.4.6: Unemployment Rate (2011–2020)**



Source: (National Skills Commission, 2021)

**Figure 1.4.7: Unemployment Rate, Great South Coast LGAs**

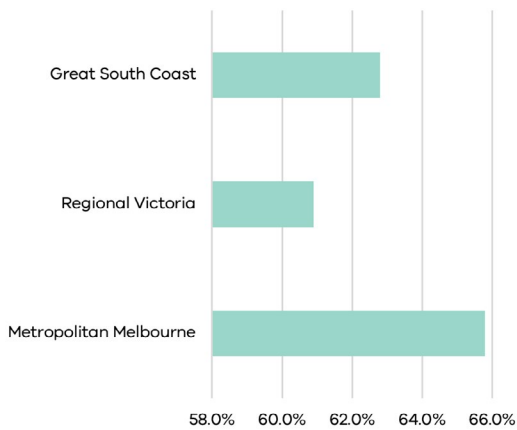


Source: (National Skills Commission, 2021)

## Participation rate

The labour force participation rate in the Great South Coast (62.8 per cent) slightly exceeds regional Victoria (60.9 per cent) but lags metropolitan Melbourne (65.8 per cent) (see Figure 1.4.8). The Great South Coast outperforms regional averages across all age-cohorts, particularly is among older cohorts (see Figure 1.4.9).

**Figure 1.4.8: Participation Rate (2016)**



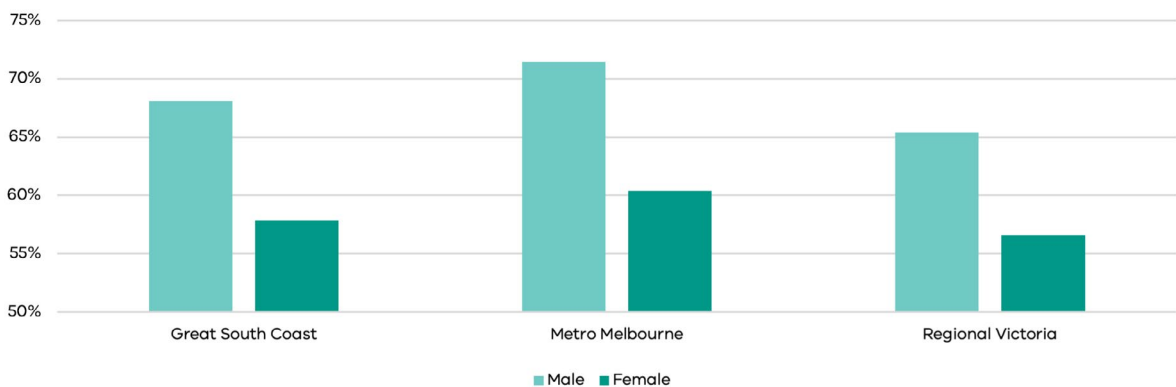
**Figure 1.4.9: Participation Rate Age Comparison**



Source: (ABS Census, 2016)

Consistent with the pattern across the state, the female labour force participation in the Great South Coast (57.8 per cent) is significantly lower than the male participation rate (68.1 per cent). While participation rates for both genders exceeds that of regional Victoria, there are opportunities to boost future economic growth if participation rates, particularly for women, could be lifted and employment opportunities created (see Figure 1.4.10).

**Figure 1.4.10: Participation Rate by Gender (2016)**



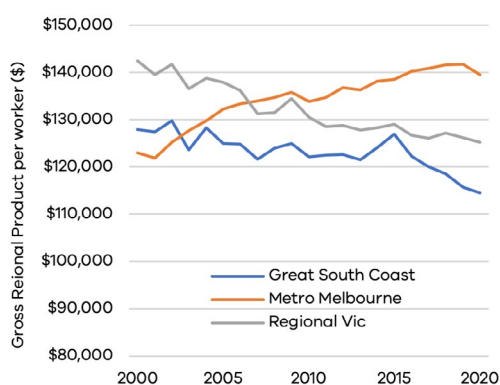
Source: (ABS Census, 2016)

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

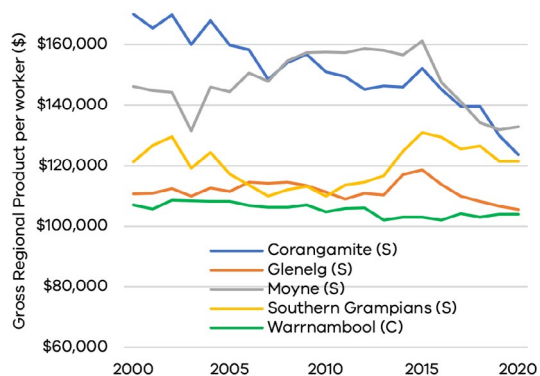
Since 2001, labour productivity in the Great South Coast has declined consistent with the rest of regional Victoria and contrasted against metropolitan Melbourne which has progressively increased (see Figure 1.4.11).

Across LGAs, there are notable discrepancies in worker productivity. In 2000, Moyne and Corangamite had the highest productivity in the region however, both municipalities have trended downwards. Meanwhile, Warrnambool and Glenelg exhibit lower but relatively stable productivity.

**Figure 1.4.11:**  
Regional Productivity



**Figure 1.4.12:** LGA Productivity, Great South Coast



(NIEIR, 2020)

## Worker mobility and commuting across regions

An analysis of journey-to-work patterns between the LGAs indicates varied levels of worker movement.

Generally speaking, the LGAs within the Great South Coast have labour markets which are self-sufficient i.e. local jobs are filled by those who live within the municipality and self-contained i.e. local workers are employed within the municipality. Moyne is the notable exception, over 3,000 locals leave the LGA for work (principally to Warrnambool) and over 1,800 people commute to the municipality (see Table 1.4.13). As the region's major socioeconomic centre, Warrnambool experiences a relatively significant number of workers commuting to the city (see Table 1.4.14). Almost 20 per cent of local jobs are filled by those from outside the municipality. The highest number of people in the Great South Coast who leave the region for work is found in Corangamite Shire where over 500 people commute northward or eastward, predominantly to Colac-Otway. Similarly, over 450 people leave Glenelg Shire to commute outside the region, predominantly to South Australia.

**Table 1.4.13: Labour mobility**

	Corangamite (S)	Glenelg (S)	Moyne (S)	Southern Grampians (S)	Warrnambool (C)
Total local workers (working anywhere) (UR)	7,167	8,310	7,730	7,251	15,603
Number of jobs in local area (POW)	7,076	7,766	6,191	7,160	15,744
Number of local jobs held by locals	5,863	7,227	4,227	6,395	12,740
Number of locals employed outside LGA	1,045	833	3,147	551	2,302
Employment Self containment	85%	90%	57%	92%	85%
Employment Self Sufficiency	83%	93%	68%	89%	81%

Source ABS, Census 2016

**Table 1.4.14: Labour mobility across LGAs**

Place of work → Place of residence ↓	Corangamite (RC)	Glenelg (C)	Moyne (S)	Southern Grampians (S)	Warrnambool (S)	Outside GSC
<b>Corangamite</b> (S)	5,863	-	186	12	304	543
<b>Glenelg</b> (S)	-	7,227	59	266	57	451
<b>Moyne</b> (S)	311	83	4,227	184	2,338	231
<b>Southern Grampians</b> (S)	9	135	60	6,395	52	295
<b>Warrnambool</b> (C)	363	60	1,476	47	12,740	356
<b>Outside GSC</b>	524	253	180	256	250	

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.

## 1.5 Skills

The Great South Coast has experienced employment growth across a range of occupations, including moderate growth in skilled professions. While the region has a larger proportion of its workforce working in skilled occupations than the regional average, the number is growing at a slower rate.

- Growth in demand for skilled occupations reflects the changing nature of the region's industry structure towards health care and education services.

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, there were approximately 33,600 workers in the Great South Coast employed in skilled occupations, representing 63.2 per cent of the local workforce. As a proportion of the total workforce, Great South Coast exceeds regional Victoria's average share of skilled workers (62.2 per cent) but lags metropolitan Melbourne (67.3 per cent). 19,500 low skilled workers round out the workforce in the region.

In the five years to 2021, the number of skilled workers increased by approximately 800 workers (2.5 per cent), while the number of low skilled workers decreased by approximately 2,400 workers (10.8 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 Great South Coast, followed by Sales Assistant (General) and Registered Nurses. Five of the top ten employing industries were skilled occupations, all of which experienced growth in total workers between 2016 and 2021.

**Table 1.5.1: Top 10 employing occupations**

Great South Coast	2021	2016	Change	Skill level*
Livestock Farmers	7,500	7,000	400	Skilled
Sales Assistants (General)	2,900	3,100	- 200	Low Skilled
Registered Nurses	1,900	1,600	300	Skilled
Livestock Farm Workers	1,500	1,700	- 200	Low Skilled
Truck Drivers	1,300	1,500	- 200	Low Skilled
Retail Managers	1,200	1,100	200	Skilled
Secondary School Teachers	1,100	900	200	Skilled
General Clerks	1,000	1,100	- 100	Low Skilled
Primary School Teachers	1,000	900	200	Skilled
Receptionists	1,000	1,000	- 0	Low Skilled

\*Note employment figures rounded to nearest 100. Change may not match levels due to rounding. 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. Skilled workers are defined as being classed between an ANZSCO Skill level of 1-3, while low skilled is classed as 4 or 5.

(Department of Education and Training, 2021)



Casterton

## 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. The region has a strong advantage in Agriculture, Forestry and Fishing and mining industries. Furthermore, manufacturing subindustries have presented strong specialisation and the local industry outperformed the average GVA growth across all regions over the past five years, suggesting the region has some local factors which may lead to further manufacturing 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 (Great South Coast Industry Profile 2019) found the region has considerable endowments across a range of attributes:

## 2.1 Transport Infrastructure

With no parts of the region bordering metropolitan Melbourne, the Great South Coast regional partnership region is one of Victoria's more remote regions. However, the region is well connected via ports and airports both within the region and through its road and rail connection to Melbourne, Geelong and Adelaide (see Figure 2.1.1). These links are important for supporting economic activity and accessing interstate and international markets.

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

- the Princes Highway, connecting Melbourne to Geelong, Warrnambool and Portland through to Adelaide via Mount Gambier
- the Hamilton Highway connecting Geelong to Cressy, Mortlake and Hamilton
- the Hopkins Highway connecting Warrnambool to Mortlake
- the Henty Highway connecting Lascelles, Hopetown, Horsham, Hamilton and Portland.

The rail network includes direct passenger and freight rail route from Warrnambool to Melbourne and freight rail access to Port of Portland from northern Victoria via Ararat. There is also part of the mainline interstate freight and passenger line between Ararat and Geelong located within the Great South Coast.

The region has several smaller regional airports, including in Warrnambool, Portland, Hamilton and Casterton however, there is no regular passenger air service in the region. Avalon airport is also an important connection for the Great South Coast. The western parts of the region proximate to South Australia also benefit from infrastructure across the border, including the Mount Gambier Airport and its connections to Melbourne and Adelaide.

Located between Melbourne and Adelaide, the Port of Portland is the major deep-water port in the region. It provides access to international markets and specialises in bulk commodities, particularly agricultural, forestry and mining products. It handles approximately 7.5 million tonnes of cargo annually, including 5 million tonnes of forest products and 45 per cent of Victoria's dry bulk cargo. The port processes 300 ships per annum (Port of Portland, 2020). By comparison, Geelong Port handles approximately 12 million tonnes of product per year with 600 vessel visits (Geelong Port, 2020) and the Port of Melbourne handles approximately 97 million tonnes per year (Port of Melbourne, 2020). The Port of Portland serves both Victorian and South Australian markets, particularly bulk agricultural, forestry and mining export products. The Port is connected to South Australia by the Portland-Nelson Road and the Princes Highway. The region also has access to the Port of Melbourne and Geelong Port via the Princes Highway and the South West rail line.





**Figure 2.1.1: Transport Connections, Great South Coast**



Source: (Infrastructure Victoria, 2019)

## 2.2 Digital Infrastructure<sup>12</sup>

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 well below the state average (71.0) on the index, with Glenelg scoring lowest, while Warrnambool scored highest.

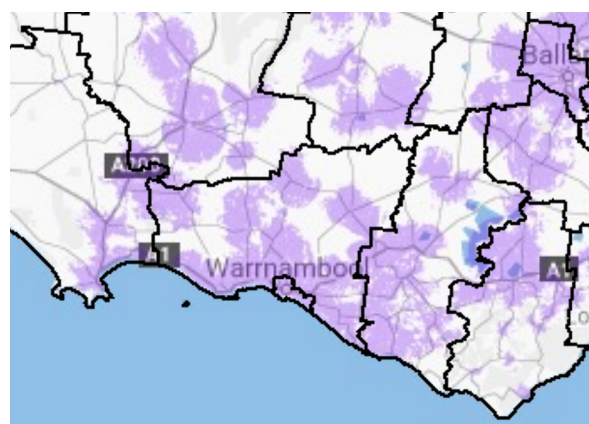
**Table 2.2.1: ADII score comparison 2021, VIC**

Local Government Area	Score
Corangamite	64.0
Glenelg	62.0
Moyne	64.0
Southern Grampians	63.0
Warrnambool	65.0
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, Great South Coast**



(NBNco, 2020)

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

- Increased need for better connectivity to support tourism attraction and retention as well as hosting events.
- Need for connectivity during natural disasters and emergencies.
- Competitive internet speeds are needed to attract businesses and investment, as well as to support tourism and population growth.
- Need for connectivity to enable advancement in agriculture Internet of Things.
- Need for better come connectivity to support remote work and online education.

The Great South Coast Digital Plan found that 18 tourist locations, 11 permanent spots, three events and four trails identified that all locations had issues with fixed access broadband, while most had adequate mobile coverage, however some national parks and trails are underserved. (RDV, 2020)

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**

	<b>Fixed broadband access</b>	<b>Mobile access</b>
<b>Cities and large towns, such as Warrnambool and Hamilton</b>	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
<b>Small towns and localities, such as Coleraine and Timboon</b>	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
<b>Primary production areas, such as dairy grazing around Heywood</b>	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
<b>Tourist locations, such as the Twelve Apostles</b>	Most relevant to tourist operators and businesses. Higher capacity technologies like FTTP 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
<b>Transport corridors, such as major highways and rail lines</b>	N/A	Stronger and more reliable coverage on large highways and rail lines out to Warrnambool, with service quality and reliability compromised on smaller roads and in more remote areas

(Infrastructure Victoria, 2019)

## 2.3 Natural Endowments

The Great South Coast region has expanses of undeveloped coastline, volcanic landscapes, significant areas of public land and national parks as well as large areas of productive agricultural land.

Key natural resources and environmental features include fertile land, wind and geothermal energy, natural gas, timber, sand, stone, gold, oil shale and mineral sands. Key environmental assets include the Twelve Apostles marine and coastal parks, Budj Bim, Great Otway Grampians National Parks, farmland (suitable for dairy farming) and forests (timber production).

### Land use

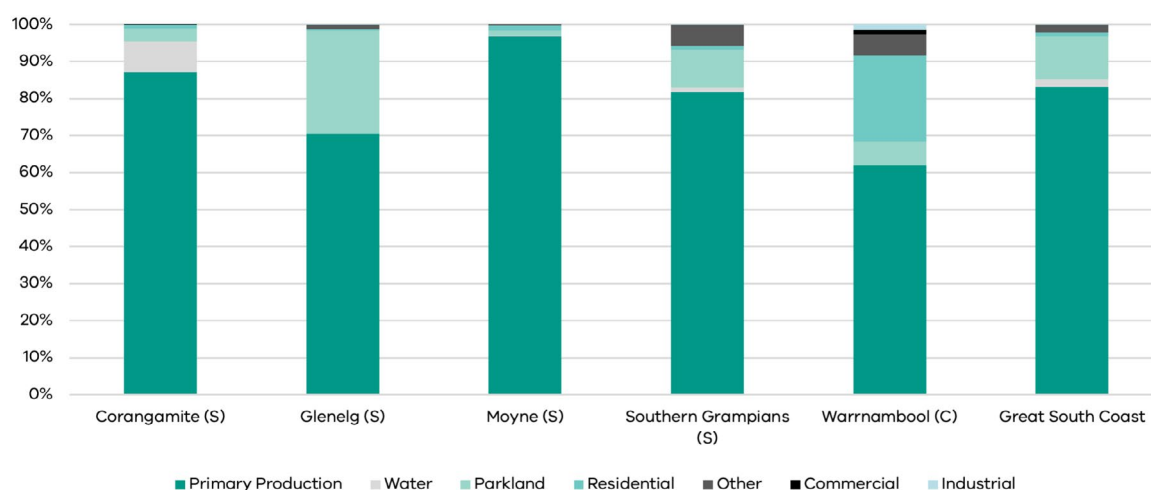
Most land used in the Great South Coast is dedicated to agricultural purposes (Figure 2.3.1). Most of the remaining land is used as parkland and a mix of residential or other uses.

The Great South Coast region is a strategically important agricultural region, with historically high value farmland. There have been substantial changes in land use since the early 1990s; while broad acre grazing is still prominent, there have been significant increases in the area of land used for dairying, cropping, and blue gum plantations (Glenelg Hopkins CMA, 2017).

The region is particularly strong in dairy production. Alone, dairy accounts for over a third of the Great South Coast's agricultural production and the region produced over a third of Victoria's milk in 2016 (Agriculture Victoria, 2019). Dairy production is concentrated in the south eastern part of the region (see Figure 2.3.2). There is also extensive plantation forestry in the west, and emerging livestock and grains industries in the north.

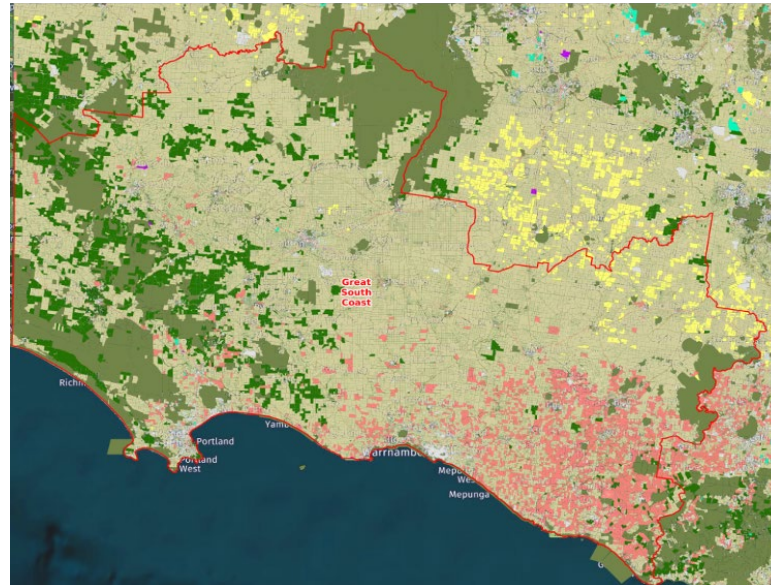
Built-up areas along the coast and in the region's north attract and support most of the population as well as a substantial tourism industry. There is potential for land use conflict, between demands for strategic agricultural land and residential activity, especially along the corridor from Warrnambool to Portland. (Infrastructure Victoria, 2019)

**Figure 2.3.1: Land Use by LGA, Great South Coast**



Source: (ABS, 2017)

**Figure 2.3.2: Spatial Map of Land Use, Great South Coast**



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

(Agriculture Victoria, 2020)

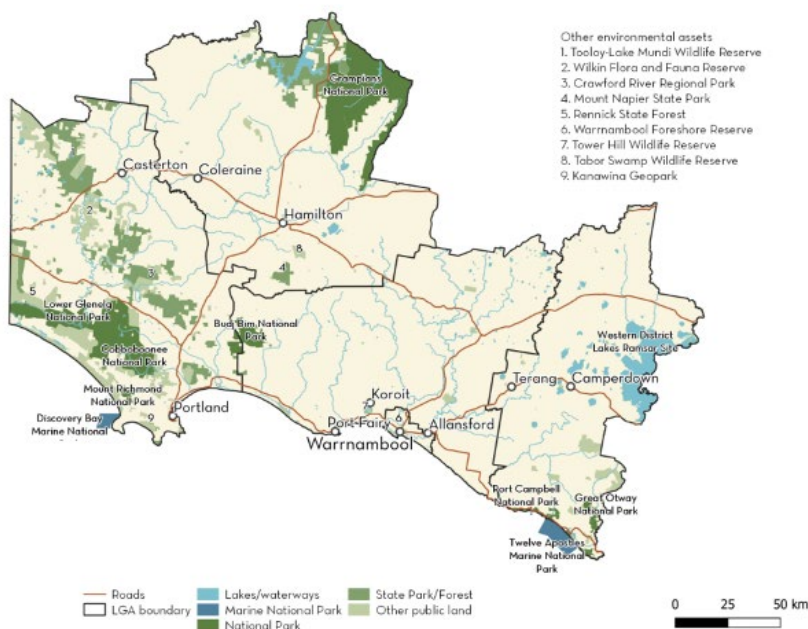
### Environmental Assets

The Great South Coast region has a diverse range of environmental assets, including rainforest, wetlands, volcanic cones, lakes, native grasslands and coastline (see Figures 2.3.3 and 2.3.4). Assets with high environmental value are principally found in public land reserves. The Great South Coast marine area is part of the Otway Marine Bioregion, which stretches from Cape Jaffa in South Australia to Apollo Bay, and whose unique environmental assets provide habitat and breeding grounds for native plant and animal species. In addition to important ecosystem services, coastal and marine areas are also valuable recreational, commercial and tourism resources offering opportunities for economic development. Most coastal and marine assets are in protected zones.

**Table 2.3.3: Key Environmental Assets, Great South Coast**

National Parks	State Forest and State Parks	Marine and Coastal parks and sanctuaries	Other
<ul style="list-style-type: none"> <li>Grampians (Gariwerd) National Park</li> <li>Great Otway National Park</li> <li>Mount Richmond National Park</li> <li>Cobboboonee National Park</li> <li>Lower Glenelg National Park</li> <li>Budj Bim National Park</li> <li>Port Campbell National Park</li> <li>Mount Eccles National Park.</li> </ul>	<ul style="list-style-type: none"> <li>Mount Napier State Park</li> <li>Rennick State Forest.</li> </ul>	<ul style="list-style-type: none"> <li>Twelve Apostles Marine National Park</li> <li>Bay of Islands Coastal Park</li> <li>Discovery Bay Marine National Park</li> <li>Merri Marine Sanctuary</li> <li>The Arches Marine Sanctuary.</li> </ul>	<ul style="list-style-type: none"> <li>Numerous conservation reserves including: Warrnambool Foreshore Reserve, Tower Hill Wildlife Reserve, Tabor (Buckleys) Swamp Wildlife Reserve</li> <li>Regional Parks including Crawford River</li> <li>Kanawinka Geopark.</li> </ul>

**Figure 2.3.4: Great South Coast region, Key Environmental Assets**



Source: (Infrastructure Victoria, 2019)

## Mineral resources and forestry

The Great South Coast has several mineral resources which make a strong contribution to the local economy, including sand, stone, gold and oil shale. The Otway Basin, which spans from Cape Jaffa in South Australia west to Port Phillip Bay and south to Tasmania, has substantial natural gas resources. The Mortlake Power Station, located in the west of the Moyne LGA approximately 12 kilometres west of Mortlake, is the largest gas-fired power station in Victoria and can generate 566 megawatts (MW) of power (equivalent to approximately 250,000 homes) (Infrastructure Victoria, 2019). Timber resources in the west make a substantial contribution to the region's economy. The Great South Coast region encompasses much of the Victorian side of The Green Triangle forestry region. This region's climate and topography makes the Green Triangle a premier location for growing and processing wood fibre, both from hardwood and softwood plantations. The Green Triangle region overall contains over 300,000 hectares of plantations, much of which is in the Great South Coast, and it able to be exported from the Port of Portland's deep-water port. (Green Triangle Forest Industries Hub, 2019)

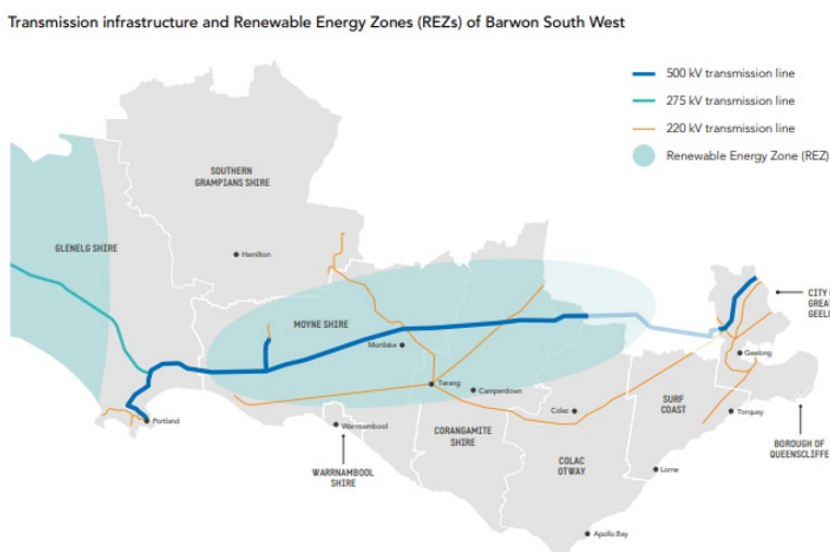
## Renewable energy

The Great South Coast region has an array of renewable energy assets, including wind, geothermal and tidal energy. Wind power is the most prominent source of renewable energy to date in the region, and along with Solar is the communities preferred technology for renewable generation (DELWP, 2019).

The current renewable energy landscape in Great South Coast includes wind generation along the southern coast of Glenelg, near Portland, the coast of Moyne, near Yambuk and several inland wind farms in Moyne, Southern Grampians, and Corangamite shires. In addition, the City of Warrnambool has large scale solar and bioenergy facility and Deakin University's Warrnambool Campus is hosting a leading hydrogen research project Hycel (Deakin, 2020). Across Great South Coast LGAs, there is significant renewable energy generation capacity from existing rooftop solar as well as solar and wind farms; Glenelg (154.9MW), Southern Grampians (77.8MW), Moyne (536.7MW), Warrnambool (7.1MW), and Corangamite (13.8MW). (DELWP, 2019)

The Great South Coast also benefits from existing high voltage transmission infrastructure (see Figure 2.3.5), in particular a 500kV transmission line that links the traditional source of energy (Latrobe Valley) and the major demand locations of Melbourne and Geelong with the Portland Aluminium smelter. In addition, there is a transmission line connecting Portland to South Australia via the Heywood interconnector. This high voltage transmission infrastructure provides opportunity for renewable generation to maximise output exported out of the Great South Coast region (DELWP, 2019)

**Figure 2.3.5: Energy Transmission Infrastructure, Barwon South West**



Source: (DELWP, 2019)

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## 04 Strategic context

### Great South Coast Regional Economic Development Strategy

The following table describes the local strategies, plans and frameworks that shaped the Great South Coast 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**

<b>CSIRO: Renewable Energy Transition to 2035 for the Great South Coast</b> 2021	
<b>Purpose</b>	The report presents a set of scenarios for how the role of renewable energy development may play out in the Great South Coast region of Victoria to 2035.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Investment in energy infrastructure to support integration of renewable energy</li> <li>• Social licence</li> <li>• Investment in liveability</li> <li>• Incentives</li> <li>• Supporting new business opportunities</li> <li>• Building capacity and developing human capital</li> <li>• Information and communication</li> <li>• Planning, coordination and collaboration</li> <li>• Learning and sharing</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p><b>Agri-food supply chain</b></p> <hr/> <p>✓ <b>Energy resources</b></p> <hr/> <p>✓ <b>Workforce</b></p> <hr/> <p><b>Visitor economy</b></p> <hr/> <p><b>'Green Triangle'</b></p>
<b>Growing Our Regional Futures Strategy</b> 2021	
<b>Purpose</b>	The purpose of the strategy is to grow the value of regional food and fibre production to improve the prosperity and resilience of our local communities. The strategy acknowledges the significant challenges, barriers to overcome and provides a framework for targeted collaborative actions to position food and fibre, as well as the region collectively, for greater prosperity and wellbeing.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Drive regional value-add, investment and sustainability</li> <li>• Realise the water opportunity</li> <li>• Nurture food and fibre careers</li> <li>• Champion food and fibre advocacy</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p>✓ <b>Agri-food supply chain</b></p> <hr/> <p><b>Energy resources</b></p> <hr/> <p>✓ <b>Workforce</b></p> <hr/> <p><b>Visitor economy</b></p> <hr/> <p><b>'Green Triangle'</b></p>

### Australia's Great South Coast: Green Hydrogen Powerhouse 2021

**Purpose** Seeks to advocate for and understand how and why green hydrogen could be harnessed in the Great South Coast for major social and economic gains. Advantages and benefits are articulated as well as next steps.

- Identified priorities**
- Water requirements for green hydrogen applications,
  - Implications for existing transmission infrastructure arising from major green hydrogen developments
  - Market pricing and regulatory settings and the potential for new pilot approaches in the region
  - Outreach to neighbouring renewables regions to examine further scale efficiencies
  - Community engagement and awareness around hydrogen sector safety, sustainability, training and standards
  - Strengthening tertiary sector research and innovation capacity
  - Hydrogen export supply chain and grid supply chain analysis

**Influence on the REDS strategic directions**

**Agri-food supply chain**

✓ **Energy resources**

✓ **Workforce**

**Visitor economy**

**'Green Triangle'**

### Barwon South West Renewable Energy Roadmap 2020

**Purpose** Identifies opportunities to attract investment and better understand the community's engagement and capacity to transition to renewable energy. Provides intelligence to business, industry and communities seeking to establish or expand new energy technology development, manufacturing or renewable energy generation in Victoria.

- Identified priorities**
- Support energy decentralisation initiatives
  - Develop and promote policy that fosters regional innovation and local strategies that clearly contribute to Victoria's overall targets
  - Understand the impacts of renewable energy generation on local assets
  - Work with regional TAFEs and universities to develop appropriate skill-based programs
  - Communicate more clearly and effectively on the benefits, opportunities and limitations of renewable energy technology
  - Develop a collective, co-ordinated regional vision for G21 and the broader Barwon South West
  - Look for renewable energy collaboration opportunities
  - Focus on waste management and its impact on the local area.

**Influence on the REDS strategic directions**

**Agri-food supply chain**

✓ **Energy resources**

**Workforce**

**Visitor economy**

**'Green Triangle'**

**Key and Essential Worker Housing Supply Action Plan**  
2020

<b>Purpose</b>	The purpose of the Action Plan is to increase the supply of low- to high-end rental and ownership accommodation for permanent and seasonal key workers from a range of industries across the Great South Coast and Barwon regions.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Creation of developable land at significantly reduced costs</li> <li>• Planning enablers critical to the supply of housing</li> <li>• Advocating for State and Federal government changes</li> <li>• Councils working with the development and broader community</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li><b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li><b>'Green Triangle'</b></li> </ul>

**Great South Coast Digital Plan**  
2019

<b>Purpose</b>	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
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Internet of Things (IoT) connectivity and use</li> <li>• Digital education initiatives</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li>✓ <b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li><b>'Green Triangle'</b></li> </ul>

### Great South Coast Economic Futures

2019

<b>Purpose</b>	The report outlines pathways for securing investments in reliably high-value sectors in the region. It is intended to be distributed widely by the client group to encourage pilots and commercialised research and development programs as well as to inform government policy development for this region.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Significant and targeted green hydrogen industrial research and development investments</li> <li>• Collaborative regional renewables generation, transmission, storage, investment and policy forum</li> <li>• High value water secure agriculture and horticulture precincts</li> <li>• Sustainable land based aquaculture precincts</li> <li>• High-value tourism networks — including hot springs and Indigenous cultural tourism</li> <li>• Close tertiary institution support for high value sectors</li> <li>• Cross border collaboration with south east South Australia</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li>✓ <b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li>✓ <b>'Green Triangle'</b></li> </ul>

### Great South Coast Regional Partnership Outcomes Roadmap

2019

<b>Purpose</b>	Outlines the long-term outcomes and the challenges associated with achieving them.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• A strong and diverse Great South Coast economy with more local jobs and a growing workforce</li> <li>• Accessible, quality education and career pathways that give people of all ages an opportunity to realise their potential</li> <li>• A thriving arts and culture industry, and a sustainable environment with a celebrated natural beauty</li> <li>• A healthy, safe and resilient Great South Coast Community</li> <li>• Roads, transport and infrastructure that drive prosperity, safety and liveability across the Great South Coast</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li>✓ <b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li>✓ <b>'Green Triangle'</b></li> </ul>

**Great South Coast Regional Skills Demand Profile**  
2017

<b>Purpose</b>	The profile identifies changes in the region’s economy and shifts in industry, highlighting the skills and training needs of the region to support these shifts.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Increase exposure of high school students to local careers in the classroom and on-the-job</li> <li>• Lift language, literacy and numeracy (LLN) standards and support development of transferable skills of young workers across industries</li> <li>• Address shortages in skilled professionals</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p><b>Agri-food supply chain</b></p> <hr/> <p><b>Energy resources</b></p> <hr/> <p>✓ <b>Workforce</b></p> <hr/> <p><b>Visitor economy</b></p> <hr/> <p><b>‘Green Triangle’</b></p>

**Great South Coast Digital Strategy**  
2016

<b>Purpose</b>	Aims to determine the region’s level of business uptake of digital solutions that enhance productivity and profit, level of digital maturity in businesses and exemplar businesses that are contributing to or have the potential to contribute to the growth of the region’s digital economy.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Technology pilot projects</li> <li>• Local Government as an Exemplar</li> <li>• Regional talent and skills</li> <li>• Guidance/ leadership</li> <li>• Advocacy</li> <li>• Facilities/ infrastructure</li> <li>• National Broadband Network</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p>✓ <b>Agri-food supply chain</b></p> <hr/> <p><b>Energy resources</b></p> <hr/> <p>✓ <b>Workforce</b></p> <hr/> <p>✓ <b>Visitor economy</b></p> <hr/> <p><b>‘Green Triangle’</b></p>



**Food & Fibre Strategy & Action Plan**

2015

<b>Purpose</b>	This document presents the Strategic Plan component of the Great South Coast Group Food and Fibre Strategy. It outlines the strategy platforms, programs and rationale for a five-year strategic plan. The strategy itself is intended to be a catalyst for improving cross-industry collaboration and will require cooperation from all stakeholder groups to succeed.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Lift entrepreneurship &amp; innovation</li> <li>• Champion food &amp; fibre advocacy</li> <li>• Drive investment &amp; business transition</li> <li>• Increase regional value-add</li> <li>• Realise the water opportunity</li> <li>• Build our regional identities</li> <li>• Grow agri-tourism channel</li> <li>• Nurture food &amp; fibre careers</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li><b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li><b>'Green Triangle'</b></li> </ul>

**Strategic Master Plan – Great Ocean Road Region Visitor Economy**

2015

<b>Purpose</b>	The primary objective of the Plan is to increase the yield generated from tourism visitation through the provision of quality visitor experiences, providing significant economic benefits to local communities.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Shipwreck Coast Master Plan</li> <li>• Investment attraction and facilitation, both public and private, to address current product gaps</li> <li>• Maintenance and renewal of signature product/experiences</li> <li>• Destination Development — ongoing implementation, development and renewal of local destination action plans</li> <li>• Focus on product development, marketing and visitor servicing to generate increased length of stay, increased spend and dispersal</li> <li>• Industry capacity building to grow the quality of the visitor experience</li> <li>• Actions to address the challenges of peak visitation in coastal areas</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li><b>Agri-food supply chain</b></li> <li><b>Energy resources</b></li> <li><b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li><b>'Green Triangle'</b></li> </ul>

**Great South Coast Regional Strategic Plan**

2014

**Purpose** The plan explores the challenges and opportunities the region will face as it grows over the next decade and beyond. It identifies the economic, environmental and social issues that are predicted to impact upon the regions way of life and presents a regionally agreed position as to how to respond.

**Identified priorities**

- Position for economic growth
- Improve connections within and beyond
- Sustain the natural assets
- Strengthen the communities
- Increasing collaboration

**Influence on the REDS strategic directions**

- ✓ **Agri-food supply chain**
- ✓ **Energy resources**
- ✓ **Workforce**
- ✓ **Visitor economy**

**'Green Triangle'**

**Great South Coast Regional Growth Plan**

2014

**Purpose** Provides broad direction for regional land use and development in the region and more detailed planning frameworks for key regional centres. Plan supports economic and population growth, building on regional strengths and opportunities. It also identifies infrastructure, services and workforce needed to harness the potential and benefits of growth.

**Identified priorities**

- Strengthen the region's economy through increased industry diversification, innovation and development
- Manage and utilise strategic assets and support agricultural productivity
- Attract more people to the region
- Strengthen connections to other regions
- Ensure that land and infrastructure needed to support growth are identified and appropriately planned
- Enhance liveability through improved health, education and standards of living
- Enhance equity of access to infrastructure, facilities and services
- Sustainably manage our natural resources and environmental assets

**Influence on the REDS strategic directions**

- ✓ **Agri-food supply chain**
- ✓ **Energy resources**
- ✓ **Workforce**
- ✓ **Visitor economy**
- ✓ **'Green Triangle'**

**Great South Coast Regional Transport Strategy**

2014

**Purpose** The purpose the strategy is to identify the key transport network demands, current and future freight tasks, and to develop strategies to ensure provision of sustainable infrastructure in the region.

**Identified priorities**

- Plan for and deliver projects in growth areas
- Improve the efficiency and productivity of key industries
- Maintain a resilient and reliable road networks
- Remove bottle necks in supply chain Progressive enhancement of key transport links
- All projects must be based on evidence and needs
- Maintain safety for all users of the transport network
- Enhance the productive potential and liveability of the Great South Coast
- Reduce costs to industries

**Influence on the REDS strategic directions** ✓ **Agri-food supply chain**

**Energy resources**

**Workforce**

✓ **Visitor economy**

**'Green Triangle'**

**Moyne Shire's Economic Development Strategy**

2019

**Purpose** This strategy provides a framework to guide Moyne Shire Council to support development of the local economy.

**Identified priorities**

- Attracting investment
- People and place
- Sustainability
- Together as a region
- Role of Moyne Shire Council
- Major local industries

**Influence on the REDS strategic directions** ✓ **Agri-food supply chain**

✓ **Energy resources**

✓ **Workforce**

✓ **Visitor economy**

**'Green Triangle'**

### Glenelg Shire Council Plan 2017

<b>Purpose</b>	The plan provides Council's direction for the next four years. It is a medium-term strategic document required under section 125 of the Local Government Act 1989 to be prepared every four years following the election of a new Council. It provides a list of outcomes that Council will work towards over the next four years.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Sustaining and growing a diverse economy and social prosperity</li> <li>• Connecting people, places and spaces</li> <li>• Embracing inclusive, healthy, sustainable and diverse cultures</li> <li>• Creative, inspired, forward-thinking and action-oriented</li> <li>• Create shared visions within the community, ensuring agreed outcomes</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li>✓ <b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li>✓ <b>'Green Triangle'</b></li> </ul>

### Corangamite Shire Economic Development Strategy 2017

<b>Purpose</b>	The Economic Development Strategy 2017-2021 will set out a five-year vision for the Corangamite Shire, providing economic development guidance for both Council and stakeholders. This Economic Development Strategy builds on the previous Strategy 2011-2016.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Maintain Leadership in Economic Development</li> <li>• Promote Population Retention and Growth</li> <li>• Grow the Visitor Economy</li> <li>• Expand Food and Fibre</li> <li>• Develop Emerging Industries</li> </ul>
<b>Influence on the REDS strategic directions</b>	<ul style="list-style-type: none"> <li>✓ <b>Agri-food supply chain</b></li> <li>✓ <b>Energy resources</b></li> <li>✓ <b>Workforce</b></li> <li>✓ <b>Visitor economy</b></li> <li>✓ <b>'Green Triangle'</b></li> </ul>

### Warrnambool City Council Economic Development & Investment Strategy 2015

**Purpose** The strategy is a partnership developed through an extensive stakeholder engagement process to provide council with a plan to support industry, small business and our wider community to focus on opportunities which stimulate the economy and enable a higher standard of living for everyone.

**Identified priorities**

- Economic Leadership and Collaboration
- Infrastructure and Transport
- Investment Attraction and Business Support
- Skills and Employment
- Visitor Economy and Regional City Liveability

**Influence on the REDS strategic directions**

- ✓ Agri-food supply chain
- Energy resources
- ✓ Workforce
- ✓ Visitor economy
- 'Green Triangle'

### Southern Grampians Shire Economic Development Strategy 2011

**Purpose** The Strategy provides both a flexible framework and specific actions to guide the efforts of Council staff in contributing to the development of the Shire's economy as well as articulating the economic development objectives of Council to the community, current and potential investors.

**Identified priorities**

- A commitment to understanding the economy
- Attracting and retaining a skilled labour force
- Supporting and leveraging from major projects
- Supporting the propulsive industry sectors
- Creating and enhancing essential major infrastructure and assets
- Supporting the social and economic development of all settlements
- Better governance

**Influence on the REDS strategic directions**

- ✓ Agri-food supply chain
- ✓ Energy resources
- ✓ Workforce
- ✓ Visitor economy
- 'Green Triangle'

**Eastern Maar Country Plan – Meerreengeeye Ngakeepoorryeeyt**  
2020

<b>Purpose</b>	The Plan defines the self-determined vision for the future of the Eastern Maar people.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Wellbeing of citizens</li> <li>• Active youth</li> <li>• Strong identity</li> <li>• Healthy Country</li> <li>• Cultural strength</li> <li>• Economic independence</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p><b>Agri-food supply chain</b></p> <hr/> <p><b>Energy resources</b></p> <hr/> <p><b>Workforce</b></p> <hr/> <p><b>Visitor economy</b></p> <hr/> <p><b>'Green Triangle'</b></p>

**Paleert Tjaara Dja: Wadawurrung Healthy Country Plan**  
2020

<b>Purpose</b>	The plan lays out how Wadawurrung see Country being cared for and managed over the next 10 years. This includes walking together with government (federal, state, and local) and other key stakeholders to achieve self-determination, ensuring sustainable Wadawurrung managed investment in Country going forward.
<b>Identified priorities</b>	<ul style="list-style-type: none"> <li>• Taking care of Country and waters</li> <li>• Us supporting us – Cultural Strengthening</li> <li>• Strengthening Wadawurrung Corporation</li> </ul>
<b>Influence on the REDS strategic directions</b>	<p><b>Agri-food supply chain</b></p> <hr/> <p><b>Energy resources</b></p> <hr/> <p><b>Workforce</b></p> <hr/> <p><b>Visitor economy</b></p> <hr/> <p><b>'Green Triangle'</b></p>

### Gunditjmara Strategic Plan 2020

**Purpose** The Plan defines the self-determined vision for the future of the Gunditjmara people.

- Identified priorities**
- PEOPLE - as individuals and families
  - COMMUNITY - as diverse groups of Aboriginal people
  - ORGANISATION - a community-controlled cooperative

**Influence on the REDS strategic directions**

Agri-food supply chain

Energy resources

Workforce

Visitor economy

'Green Triangle'

### The Budj Bim Master Plan 2014

**Purpose** The Budj Bim landscape has over recent years, been subject to a range of technical studies that consider conservation, archaeology, tourism planning, business development and Gunditjmara community use. This Master Plan draws together these findings and presents a strategic vision for the Budj Bim landscape based on the conservation and sustainable use of the landscape for cultural, tourism and community purposes.

- Identified priorities**
- A living Aboriginal culture and home to the Gunditjmara people
  - Unique natural landscapes with sustainable ecological and landscape systems. Internationally recognised cultural heritage values - values which link all cultures and people
  - Enriching and memorable experiences for visitors and guests - experiences that are unique to this place and to the Gunditjmara people
  - Strong and successful partnerships between traditional owners, governments and the tourism industry, providing world's best practice in caring for country and sustainable tourism
  - Partnerships with regional, national and international cultural tourism sites and related institutions

**Influence on the REDS strategic directions**

Agri-food supply chain

Energy resources

Workforce

✓ Visitor economy

'Green Triangle'

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