Loddon Campaspe

Regional Economic Development Strategy

SUPPORTING ANALYSIS

VICTORIA
State Government

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

We acknowledge that the Loddon Campaspe Regional Partnership region is on traditional land, including the lands of the Wurundjeri, Dja Dja Wurrung, Taungurung and Yorta Yorta 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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1.1
Business and Industry Analysis

The Agriculture, Forestry and Fishing, Mining, Manufacturing and Health Care and Social Assistance sectors are all important drivers of economic growth and employment in the Loddon Campaspe region. These sectors each recorded net increases in employment over the past five years.

- The Manufacturing sector has historically been an important sector in the region and continues to be a significant contributor in employment and GVA. While the sector's contribution to regional GVA has declined over the years, Manufacturing within the region is outperforming the state average in both employment and GVA growth. Food Product Manufacturing has been the key driver of growth in the sector.
- The Mining sector is experiencing strong growth in employment compared to the Victorian average. This is likely to be driven by the Fosterville Gold Mine in Greater Bendigo, the largest gold producer in the state. While GVA performance over the past five years declined, the significant international interest in four new exploration licenses neighbouring the Fosterville Gold Mine points to strong future opportunities.

Agriculture, Forestry and Fishing continues to be a very important sector in the regional economy but recent growth in GVA has underperformed compared to the state average. However, the sector has indications of specialisation and industry clustering (high concentration of employees and businesses).

- The sector's contribution to the region's GVA shrunk between 2015 to 2020. This suggests further work will be required to maintain the sectors relative importance; such as to boost innovation, improve productivity or capture more value add throughout the agricultural supply chain.

Population growth within the region has supported strong employment and GVA outcomes in population driven sectors, such as Health Care and Social Assistance and Education and Training. This has been further supported by significant investment in the Health sector, most notably the $630 million Bendigo Hospital which was completed in 2018.

The Digital ecosystem over the past five years has outperformed the state average growth rate in areas such as internet service providers, web search portals and data processing services, presenting an opportunity for the region going forward.

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

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

LQ Analysis, Employment

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

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

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

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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)
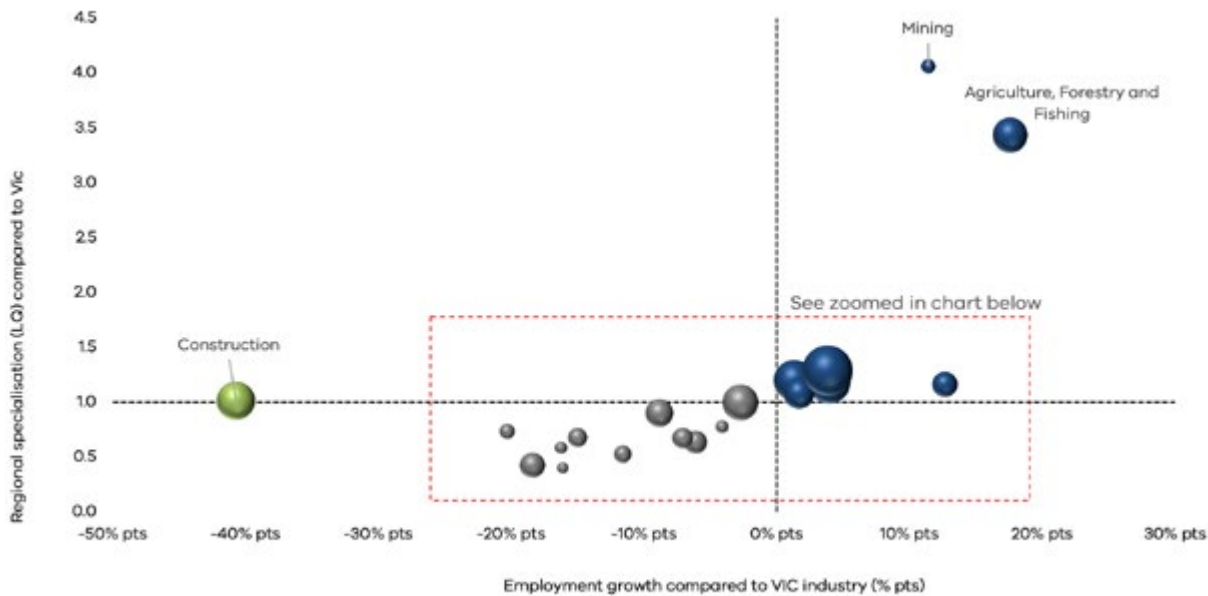
Size of bubble represents relative employment levels in 2020
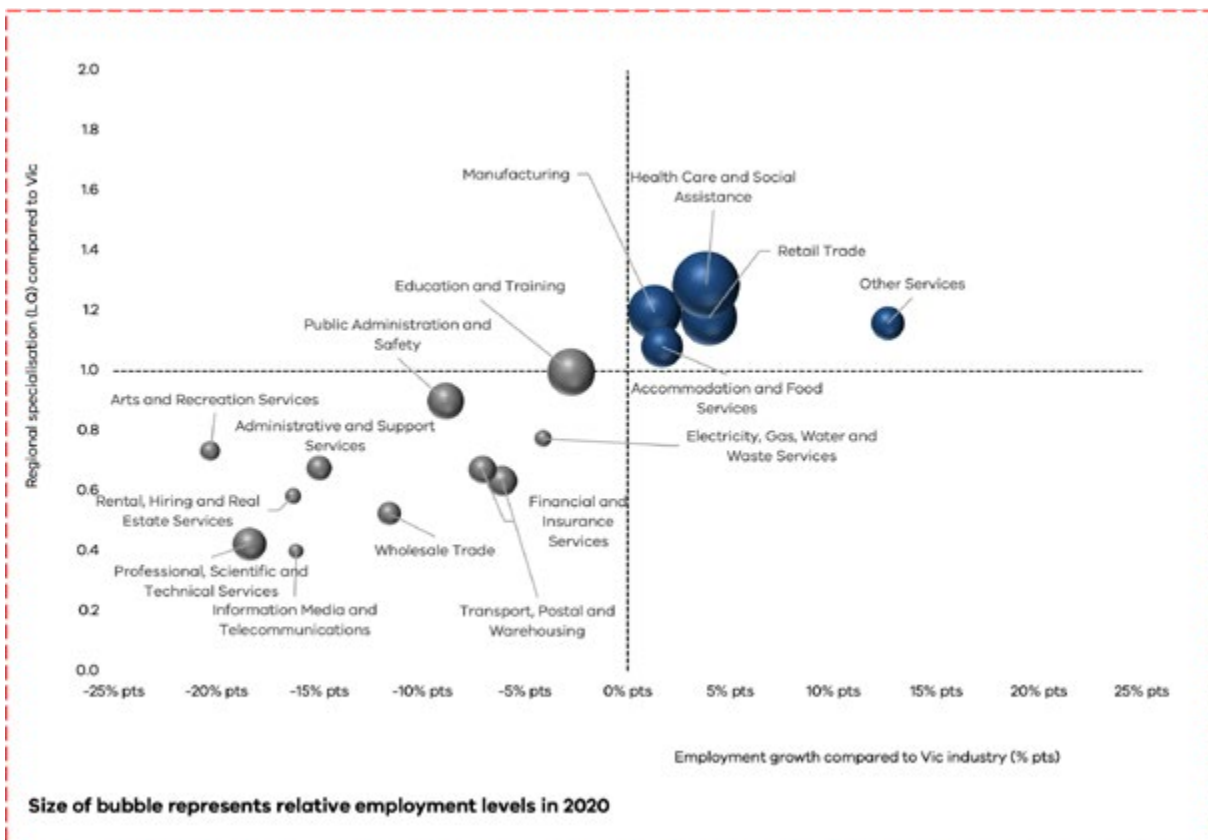
Size of bubble represents relative employment levels in 2020

(NIEIR, 2020)

As represented in Figure 1.1.1, the region is specialised in Agriculture, Forestry and Fishing; Mining; and Health Care and Social Assistance which combined represent 26 per cent of the region's employment.

Among subindustries, there is specialisation revealed in Metal Ore Mining, Agriculture, Food Product Manufacturing, Agriculture, Forestry and Fishing Support Services, Food Retailing, Accommodation, Residential Care Services, Medical and Other Health Care Services, Hospitals, Preschool and School Education and Repair and Maintenance.
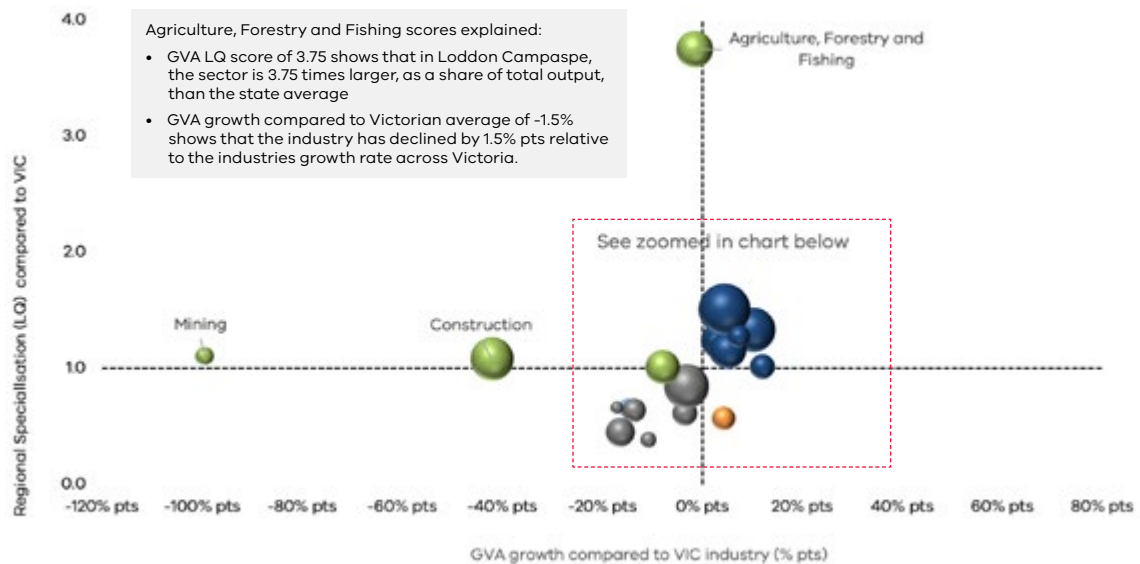
Over the past five years, the region has seen employment growth outpace the state average in seven (of 19) sectors; Agriculture, Forestry and Fishing (+17.6% pts), Other Services (+12.6% pts) Mining (+11.4% pts); Retail Trade (4.0% pts); Health Care and Social Assistance (3.8% pts); Accommodation and Food Services (1.7% pts); and Manufacturing (1.3% pts). Among industries which lagged average employment growth for the state, one industry (Construction) had a LQ score between 1.00 and 1.25. While this industry is 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, Loddon Campaspe demonstrates employment specialisations in Mining and Financial and Insurance Services. As governments and local leaders plan for the region's future economic direction, it is important to consider the regions position both within regional Victoria and the state.

LQ analysis, GVA

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

Figure 1.1.2: Location Quotient (GVA)

Agriculture, Forestry and Fishing scores explained:
- GVA LQ score of 3.75 shows that in Loddon Campaspe, the sector is 3.75 times larger, as a share of total output, than the state average
- GVA growth compared to Victorian average of -1.5% shows that the industry has declined by 1.5% pts relative to the industries growth rate across Victoria.

Size of bubble represents relative GVA levels in 2020

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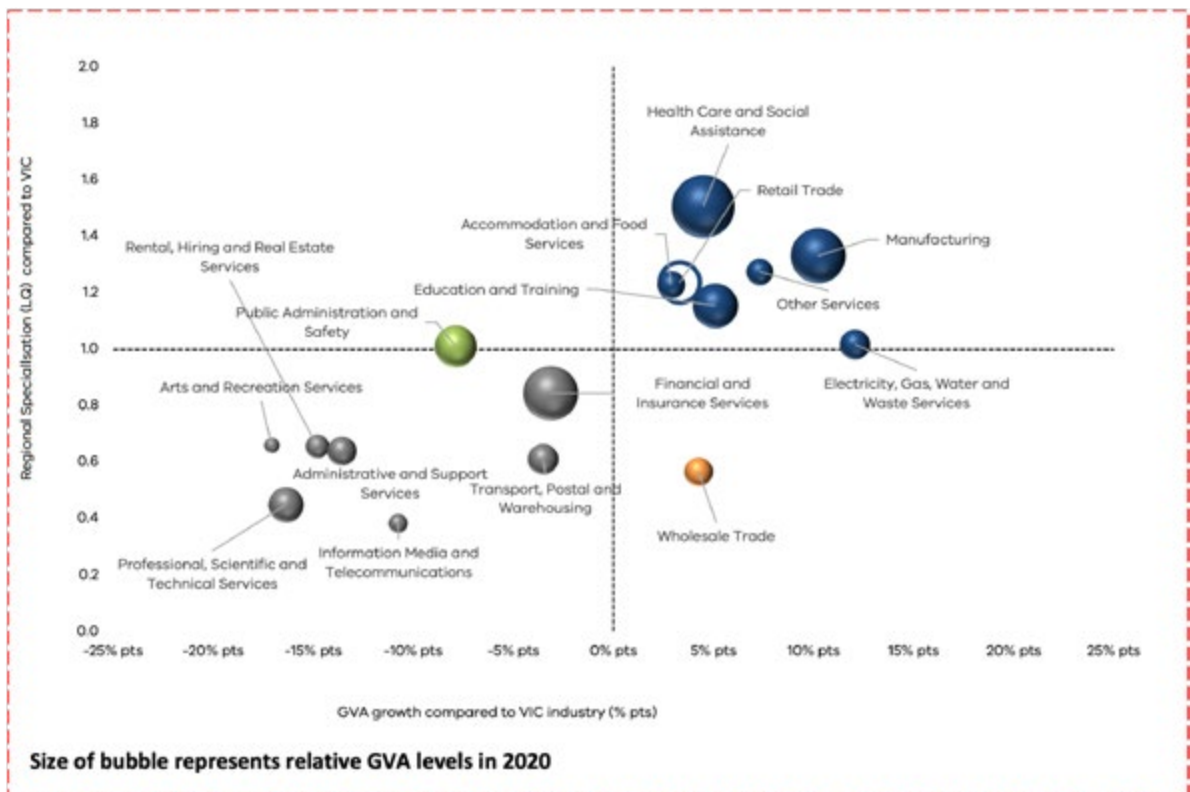
(NIEIR, 2020) Note: For visibility of all sectors some bubbles have been represented as rings, the circumference of the circle is taken as size of the bubble.

As represented in Figure 1.1.2, the region is specialised in Agriculture, Forestry and Fishing; Health Care and Social Assistance; Manufacturing and Other Services.

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

At a subindustry level, the region is also specialised in Food Product Manufacturing; Preschool and School Education; Hospitals; Medical and Other Health Care Services; Social Assistance Services; Food Retailing; Residential Care Services; Water Supply, Sewerage and Drainage Services; Metal Ore Mining; Repair and Maintenance and Non-Metallic Mineral Product Manufacturing; alongside the more traditional Agriculture sub-sectors.

Shift-Share Analysis

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

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

Blue industries which are outperforming the average industry growth rate in Victoria

Pink industries which are underperforming the average industry growth rate in Victoria but are producing greater output over time

Grey industries which are underperforming the average industry growth rate in Victoria and are declining in output production over time

Figure 1.1.3: Shift-Share Analysis
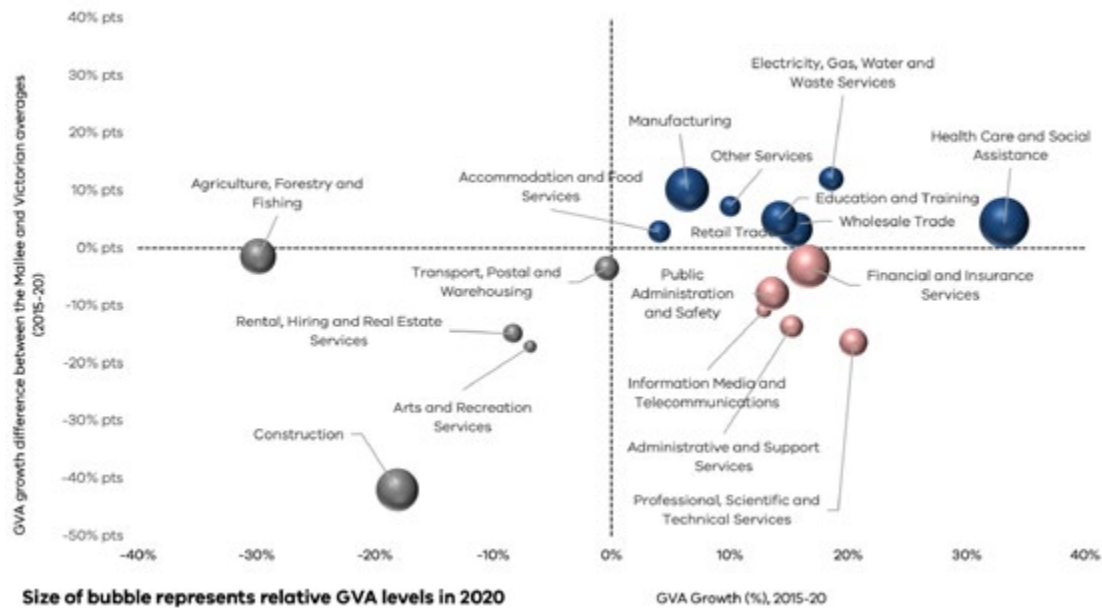
(NIEIR, 2020)

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

Relative to the Victorian average, seven (of 19) industries outperformed the average growth across the state, led by Electricity, Gas, Water and Waste Services (+12.1% pts). Furthermore, 12 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; Medical and Other Health Care Services; Food Retailing; Residential Care Services, Water Supply, Sewerage and Drainage Services; Metal Ore Mining and Repair and Maintenance all outperformed the state's average growth rate.

Strong results across a diverse range of sectors indicates the comparative strength of the Loddon Campaspe 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.[4]

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

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

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Table 1.1.4: Industry Cluster Analysis

Sector	LQ (Employment)	LQ (Business count[5])	Clusters
Agriculture, Forestry and Fishing	3.75	3.21	✓
Mining	1.10	1.97	?
Manufacturing	1.33	1.18	?
Electricity, Gas, Water and Waste Services	1.02	1.01	×
Construction	1.08	1.13	×
Wholesale Trade	0.57	0.65	×
Retail Trade	1.24	1.08	×
Accommodation and Food Services	1.23	0.99	×
Transport, Postal and Warehousing	0.61	0.59	×
Information Media and Telecommunications	0.38	0.67	×
Financial and Insurance Services	0.84	0.79	×
Rental, Hiring and Real Estate Services	0.66	0.72	×
Professional, Scientific and Technical Services	0.45	0.73	×
Administrative and Support Services	0.64	0.67	×
Public Administration and Safety	1.01	0.55	×
Education and Training	1.15	0.89	×
Health Care and Social Assistance	1.51	0.86	?
Arts and Recreation Services	0.66	1.21	×
Other Services	1.27	1.18	?

(ABS, 2020) (NIEIR, 2020)

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

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

It is important to note however that while the data does not highlight more clusters, they may still be present. By considering the benefits of clustering at a more granular level i.e. subindustry or defined geography, there remains significant scope to explore how clusters may support economic opportunities in the region.
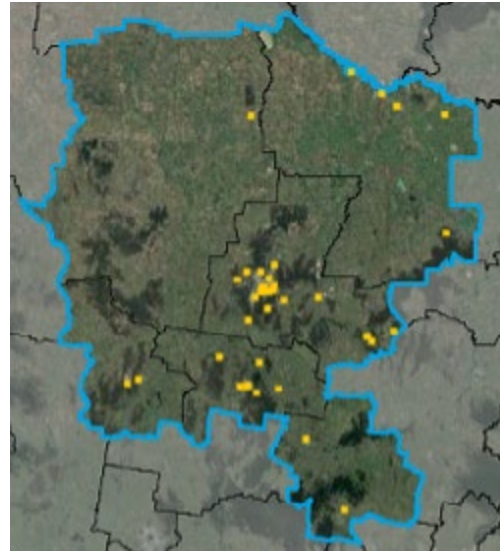
5. Business count sourced from REMPLAN and includes all active GST trading businesses with the exception of family trusts and self-managed superannuation funds

Figure 1.1.5: Cluster mapping

Agriculture businesses
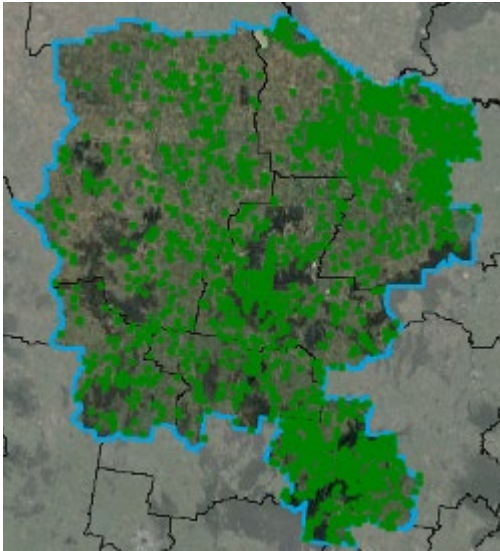
Mining businesses

Gross Value Add

Loddon Campaspe's Gross Value Add (GVA) has shown steady growth since the turn of the century, with the region's total GVA rising from $7.7 billion to $9.2 billion between FY2001 and FY2020 (see Figure 1.1.6). However, this growth is not evenly distributed across LGAs. Greater Bendigo is the largest contributor to the region's economic output, and over the past two decades has contributed the largest gains in GVA to the region. This has been driven by increased population and Bendigo's growth in the Financial and Insurance Services industry. Macedon ranges and Mount Alexander have also experienced growth since 2001. Over the same period, Campaspe and Central Goldfield's GVA saw slight falls, and Loddon Shire's GVA fell more significantly. Loddon Shire's reduction in GVA is driven primarily by falls within the Agriculture industry, and to a lesser extent a decline in the Tobacco and Beverage Manufacturing industry. These declines coincided with the millennium drought which had a significant impact on the Loddon Shire, as well as movement of irrigation water away from irrigated parts of the shire.

Figure 1.1.6: GVA over time by LGA
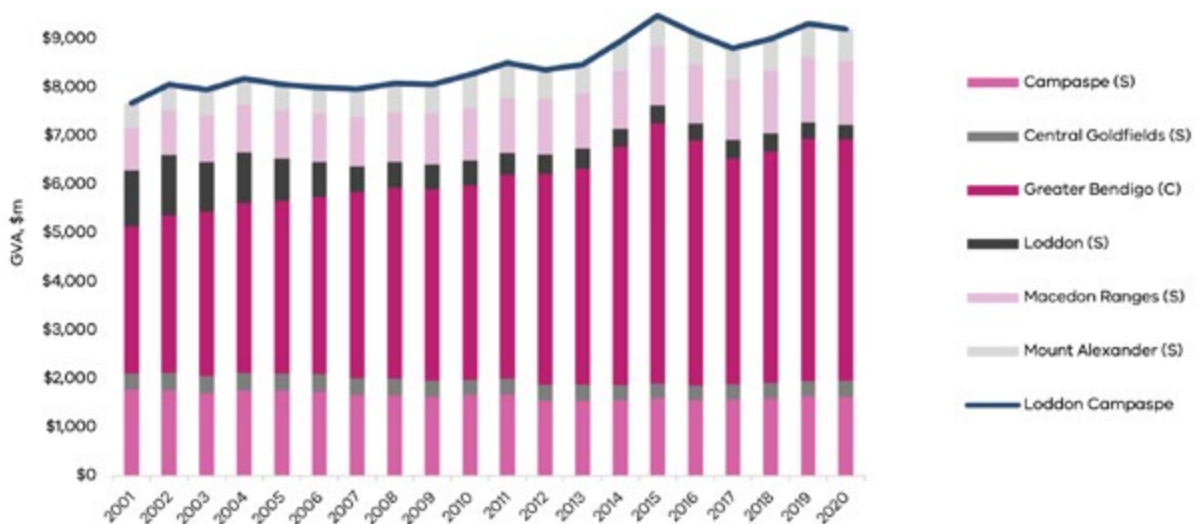
(NIEIR, 2020)

Health Care and Social Assistance has experienced significant growth since FY2001, making it the largest contributor to GVA in the Loddon Campaspe region. It is followed by Manufacturing which has declined over the past two decades. Financial and Insurance Services and Construction are the third and fourth largest contributors to GVA and have been steadily increasing over the past two decades (see Figure 1.1.7). Agriculture, Forestry and Fishing has declined from being the largest contributor to GVA in FY2001 to the fifth largest in FY2020. Mining experienced significant growth from FY2012 until FY2015 before sharply declining.

**Figure 1.1.7:** GVA by industry Loddon Campaspe
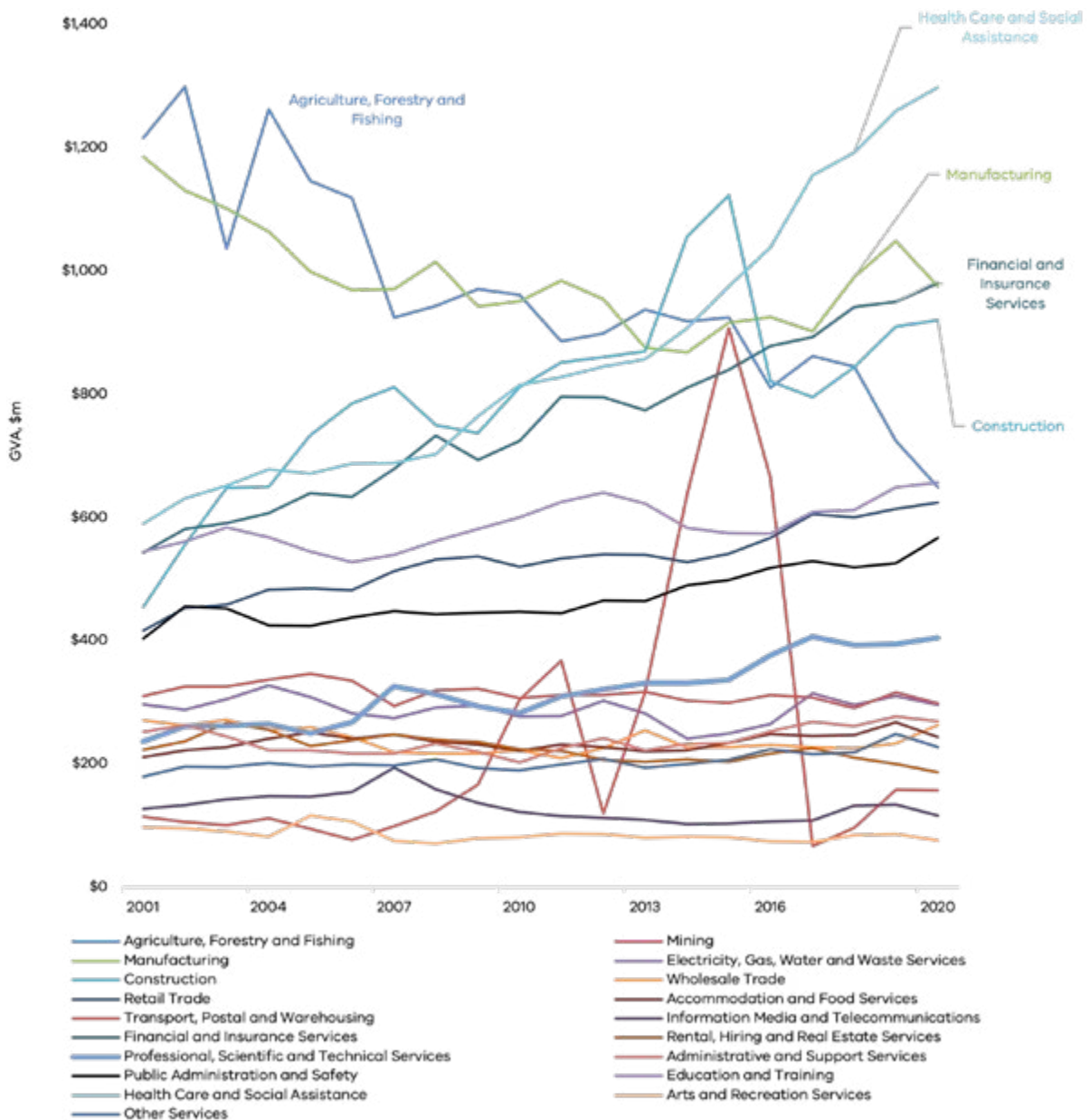
(NIEIR, 2020)

Consistent with the rest of the state, and partially explained by demographic shifts towards an ageing population, the health care and social assistance subindustries have seen GVA growth over the past twenty years. Gains have been driven by Medical and Other Health Care Services and Hospitals (see Figure 1.1.8)

**Figure 1.1.8:** GVA for Health Care and Social Assistance subindustries
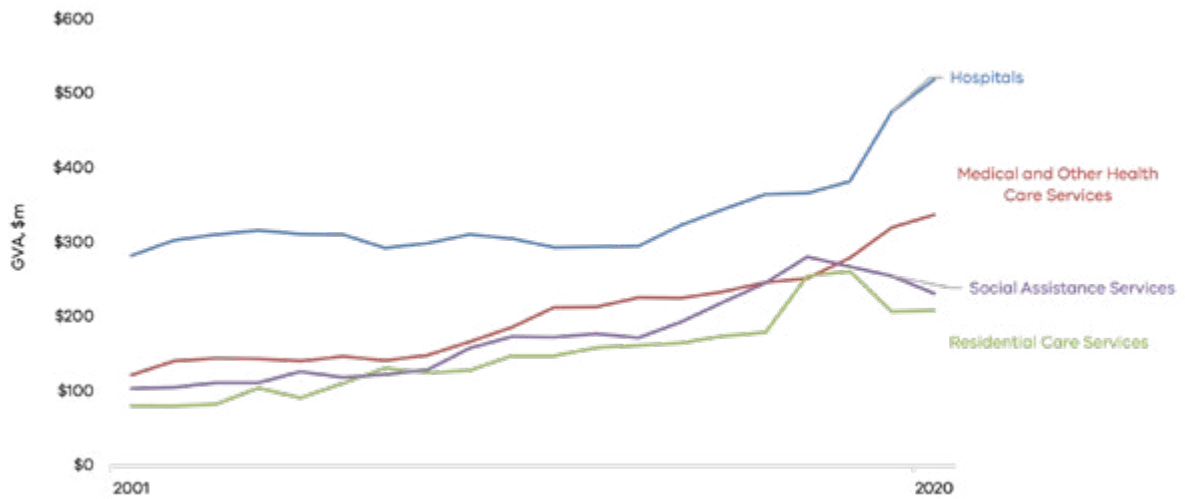
(NIEIR, 2020)

Breakdown of the largest industries show that recent growth in Manufacturing GVA was driven by Food Product Manufacturing. This experienced a sharp decline in FY2020, likely due to the forecast initial impact of the COVID-19 pandemic, however it remains to be seen how the sector responded subsequently (see Figure 1.1.9).

Figure 1.1.9: GVA for Manufacturing sub industries
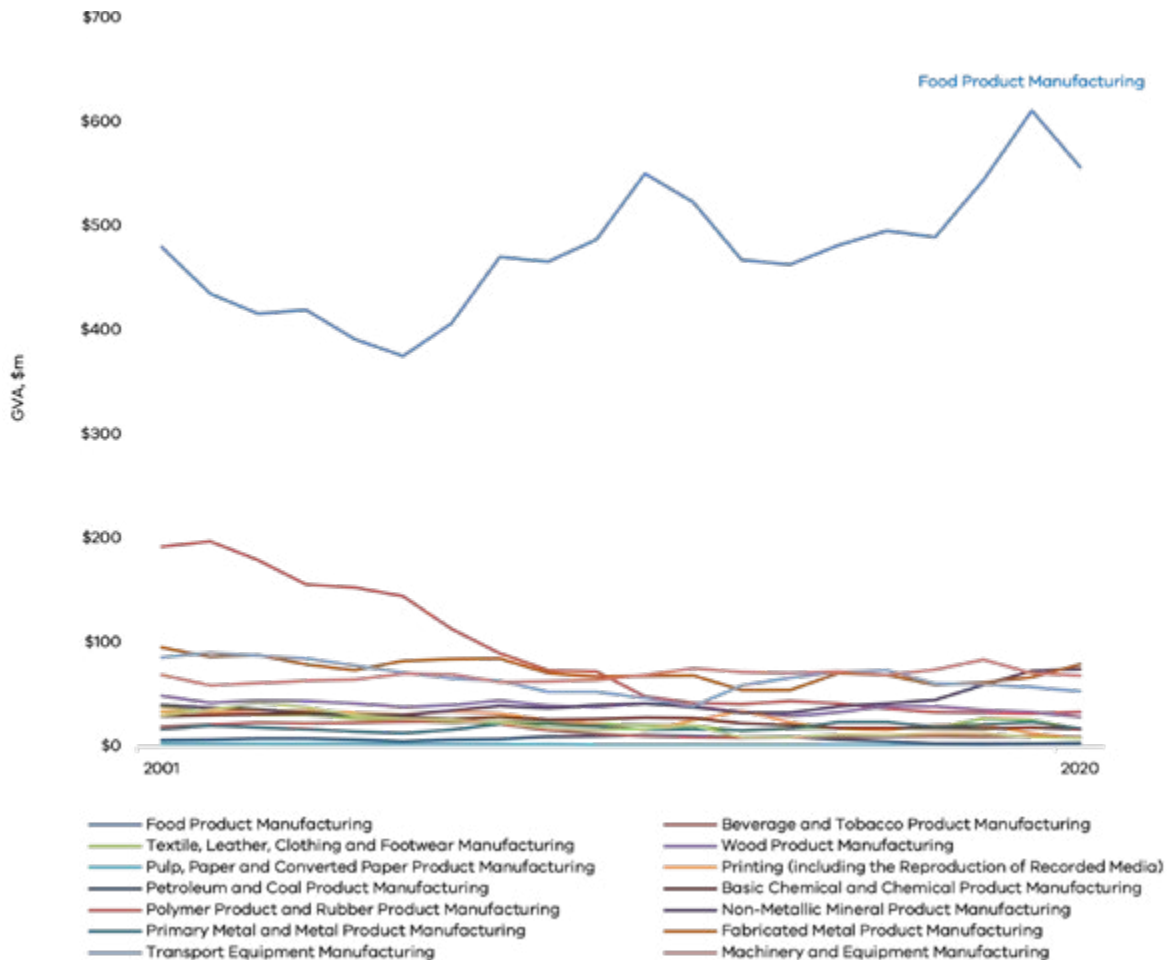
(NIEIR, 2020)

Within the Construction industry, Construction Services and Building Construction are the largest contributors to the industry's GVA. These sub-industries saw rapid growth around the turn of the century, followed by contractions and growth through to FY2020 (see Figure 1.1.10)
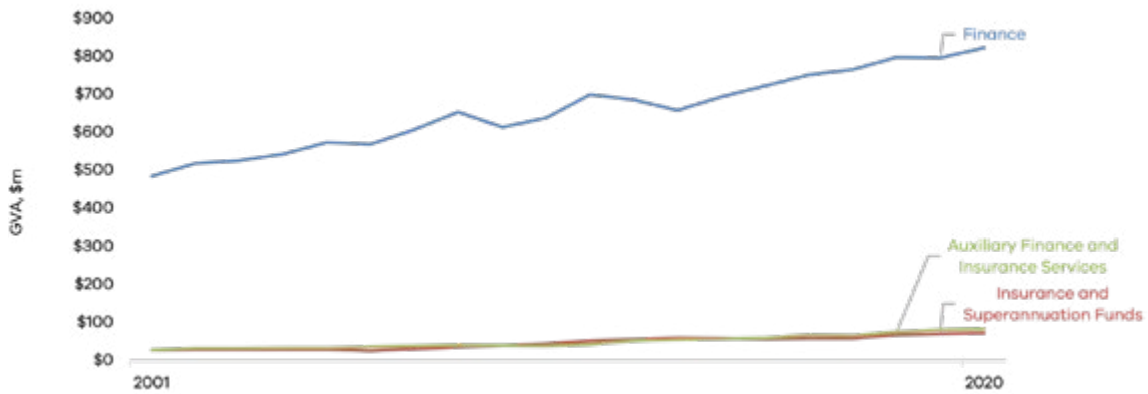
Figure 1.1.10: Construction GVA
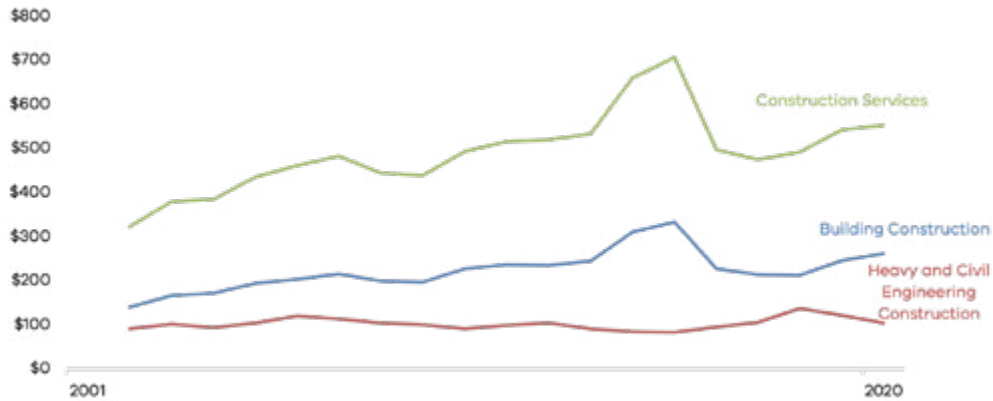
(NIEIR, 2020)

Financial and Insurance Services GVA is driven by the Finance industry in the region. This is mainly concentrated in Greater Bendigo and is a unique feature not found elsewhere in regional Victoria (see Figure 1.1.11)

Figure 1.1.11: GVA for Financial and Insurance subindustries

(NIEIR, 2020)

Business growth

Over the past five years, nearly 4,700 new businesses have established themselves in the Loddon Campaspe region, mostly concentrated around Bendigo and the Macedon Ranges. By industry, the highest proportion were in Construction (nearly 22 per cent or 1,024 of new businesses), Agriculture, Forestry and Fishing, and Professional, Scientific and Technical Services (both around 11 per cent of new businesses). Business growth in these industries is likely to reflect the emerging 'employment and innovation' corridor of knowledge-led industries and growing population centres between Gisborne and Bendigo, and the continued importance of agriculture across the rest of the region.

Other industries of significant business growth are:

- Transport, Postal and Warehousing (431 new businesses),
- Health Care and Social Assistance (334 new businesses),
- Other Services (282 new businesses), and
- Retail Trade (269 new businesses).

Among subindustries, significant business growth has occurred among:

- Management Advice and Related Consulting (172 new businesses),
- Road Freight Transport (134 new businesses),
- Carpentry Services (124 new businesses),
- Cafés and Restaurants (115 new businesses) and
- Grain Farming (107 new businesses).

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

Figure 1.1.12: Business Entries (September 2015 to September 2020)
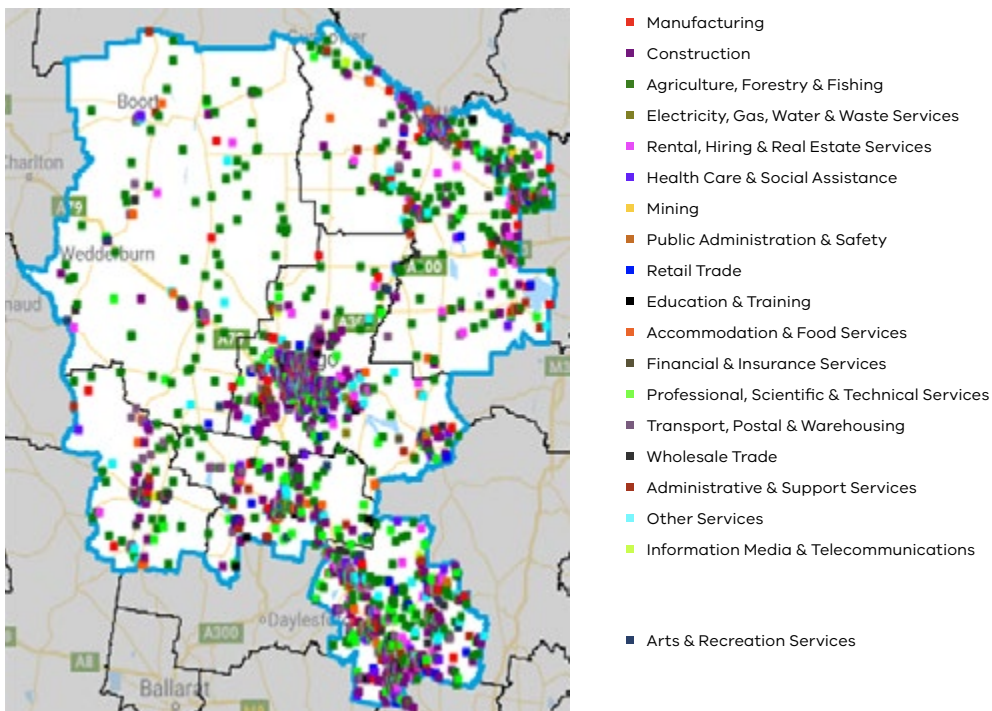
Source: (REMPLAN, 2021)

International Exports[6]

Despite its inland location, the region's producers are well connected with international markets via the Calder Freeway and Midland Highway. The key arterials link the region with Melbourne and Geelong's air- and seaports as the state's principal export gateways. International export value from the region has steadily increased over the past decade from $1.01 billion in 2010 to $1.56 billion in 2020.

Representing 52.3 per cent of total value in 2020, Manufacturing products are the primary contributor to growth, peaking at $859.0 million in export value in 2019 (see Figure 1.1.13). Food Product Manufacturing has driven the industry over the past decade; contributing $590.5 million in export value in 2020. The region is one of Victoria's most significant food processing locations with centres in Bendigo, Echuca, and Castlemaine. Activities are focussed on meat, dairy product, and fruit and vegetable processing. Beyond food, in 2020 the region also exported $65.3 million in Primary Metal and Metal Product Manufacturing Product, and $33.5 in Machinery and Equipment Manufacturing Product.

Worth $330.7 million in 2020, the second most significant exporting industry is Agriculture, Forestry and Fishing. Dairy is the region's most valuable agricultural export, followed by beef and sheep meat. 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 the state's most significant sheep and beef markets. Agricultural export value has dipped since 2018 due largely to the impact of drought and record-high water prices, and subsequently exacerbated by the COVID-19 pandemic and China's imposition of trade restrictions on key commodities and associated challenges for abattoirs to resume trade following a COVID-19 induced pause.

The two major sectors comprised 73.5 per cent of total international export value in 2020. Other smaller but relatively significant sectors are Accommodation and Food Services (worth $90.9 million in export value in 2020), Wholesale Trade (worth $65.5 million) and Education and Training (worth $56.3 million).

**Figure 1.1.13:** International Export Value, Key Industries
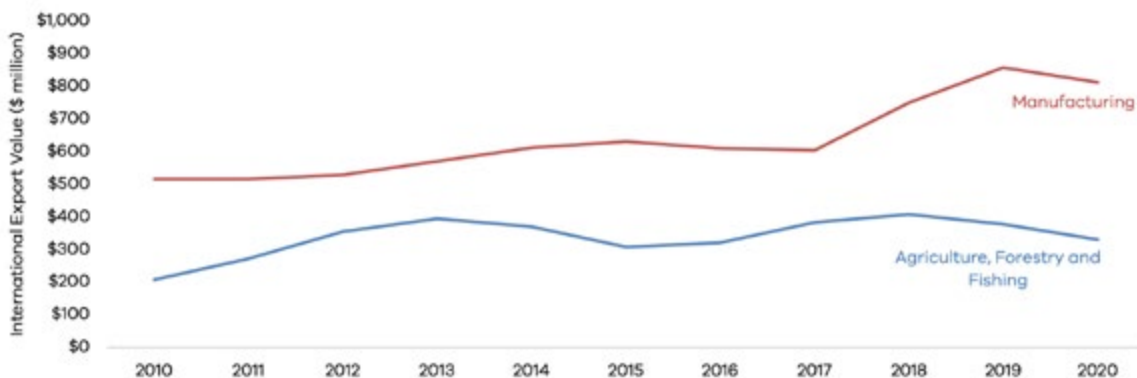
Sources: (NIEIR, 2020)

Visitor Economy

Home to several historic gold towns, Hanging Rock and series of riverside visitor locations, tourism is a significant contributor to the region's economy. Prior to COVID-19, visitor numbers and expenditure were growing year-on-year (see Figure 1.1.14). Domestic daytrips visitors have been the most common category of visitation, followed by domestic intrastate overnight visitors. However, restrictions associated with COVID-19 including international and state border closures, stay-at-home orders and density limits have significantly impacted the region's visitor economy. The total number of domestic daytrip, and domestic and international overnight visitors fell from 7.5 million in 2019 to 3.9 million in 2020. This decline led to a fall in total visitor expenditure; from $1.2 billion in 2019 to $675 million in 2020. Despite the easing of restrictions and vaccine rollout, the pandemic is likely to continue to have effects on visitation patterns to the region in the near term.

Figure 1.1.14: Visitation Overview (2015 – 2020)[7]
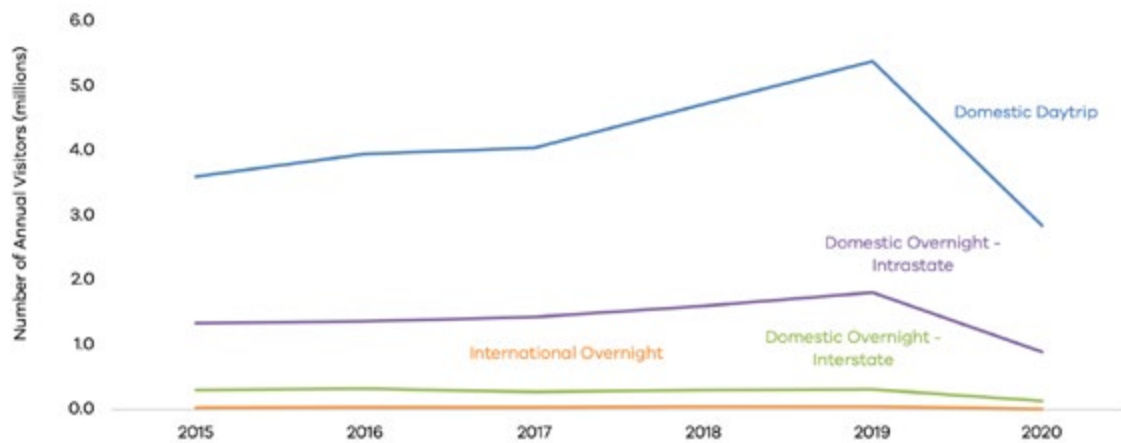
Source: (Tourism Research Australia, 2021a)

The number of international overnight visitors has fallen by 85.9 per cent, leading declines ahead of domestic interstate overnight visitors (57.1 per cent), domestic intrastate overnight visitors (50.7 per cent) and domestic day-trippers (47.1 per cent). Stretching from Melbourne's peri-urban fringe to the New South Wales border, the region has been significantly impacted by restrictions on movement between Victoria's regional and metropolitan areas and state border closures.

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

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

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

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
Domestic Daytrip	5,379,000	2,846,000	$98	$108
Domestic Intrastate Overnight	1,810,000	892,000	$274	$346
Domestic Interstate Overnight	309,000	132,000	$548	$415
International Overnight	46,000	6,000	$879	$698

Source: (Tourism Research Australia, 2021a)

Beyond the four major types of visitation, the region also previously received substantial international day trippers to Bendigo. An estimated 59,500 international day trippers visited the destination in 2019. Daylesford & Macedon Ranges received an estimated 24,700 international day trippers in the same period. To replace the international visitation shortfall caused by international border closures, efforts are required to encourage first-time domestic tourists and/or create incentives for past tourists to return.

Most of the region's tourism businesses are small enterprises. In 2019, there was 2,659 tourism businesses across the region. Of these, 74.6 per cent have four employees or fewer, with 39.9 per cent sole proprietors. Just 4.9 per cent of businesses have 20 or more employees.

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

Local Government Area	Tourism Businesses
Campaspe	478
Central Goldfields	135
Greater Bendigo	1,133
Loddon	76
Macedon Ranges	581
Mount Alexander	256
Total	2,659

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, Loddon Campaspe has experienced sustained population growth. Notwithstanding the impacts of COVID-19, this trend is expected to continue.

- Regional growth has been driven by the Greater Bendigo and, to a lesser extent, Macedon Ranges LGAs. This trend reflects the growing liveability appeal of regional cities and the peri-urban fringe for those seeking to move away from metropolitan Melbourne.

- Between 2019 and 2020, the most important contributor towards the region's population growth has been the inflow of domestic migrants from within Australia.

- 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.

Despite overall population growth, there is significant outward migration of young people (aged 15 to 24 years) across all LGAs, with the exception of Bendigo.

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

- The potential impact on working age population trends is offset by net gains in the 25 to 44 years and 45 to 64 years age cohorts. This movement may reflect the region's strong economic growth and appeal for families and mature workers as a migration destination.
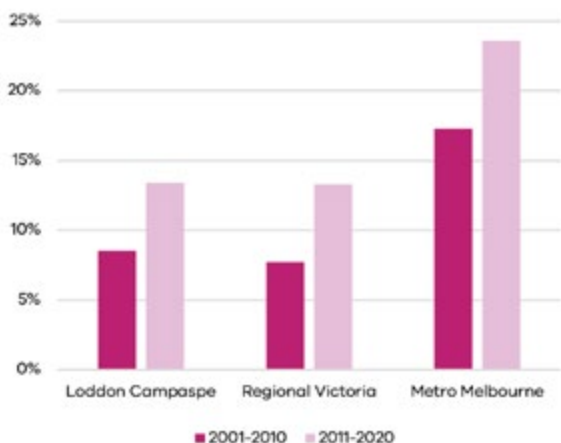
Population and population growth

In 2020, Loddon Campaspe was home to an estimated resident population of 249,192 people. 119,980 (48 per cent) of those lived in the City of Greater Bendigo, 50,971 (20 per cent) in Macedon Ranges Shire, 37,675 (15 per cent) in Campaspe Shire, 20,001 (8 per cent) in Mount Alexander Shire, 13,092 (5 per cent) in Central Goldfields and 7,473 (3 per cent) in Loddon Shire.

Loddon Campaspe's population rose by 8.5 per cent between 2001 and 2010 and by 13.4 per cent between 2011 and 2020. While growth has underperformed metropolitan Melbourne over the same period, these rates marginally outpace the average rates across regional Victoria (see Figure 1.2.1).

Loddon Campaspe's population was forecast to continue to grow, albeit less rapidly than the average rate across regional Victoria however, the impacts of COVID-19 on domestic and international migration is likely to alter previous forecasts (see Figure 1.2.2).

As the major socioeconomic centre, population growth has been driven by Greater Bendigo. There has also been strong growth in Macedon Ranges shire, attributable to urban growth and impact of long-distance commuters relocating into the region. Campaspe, Mount Alexander, and Central Goldfields all have experienced very low to no population growth and Loddon has realised slow declines (see Figure 1.2.3). Notwithstanding the impact of COVID-19, these trends are projected to continue..

Figure 1.2.1: Population Growth

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

Figure 1.2.2: Population Forecast
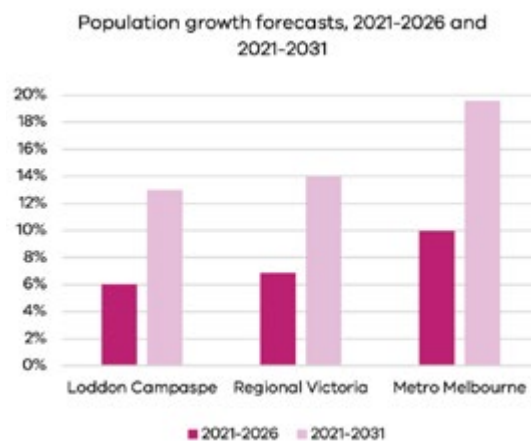
Source: (Department of Environment, Land, Water and Planning (DELWP), 2019)

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 Loddon Campaspe was realised via positive net internal migration (NIM), natural increases and net overseas migration (NOM) (see Figure 1.2.4). At a regional level, Australian residents moving into the area (NIM) is driving growth, ahead of substantial inflows of overseas migrants (NOM) and births which exceed deaths (natural increases).
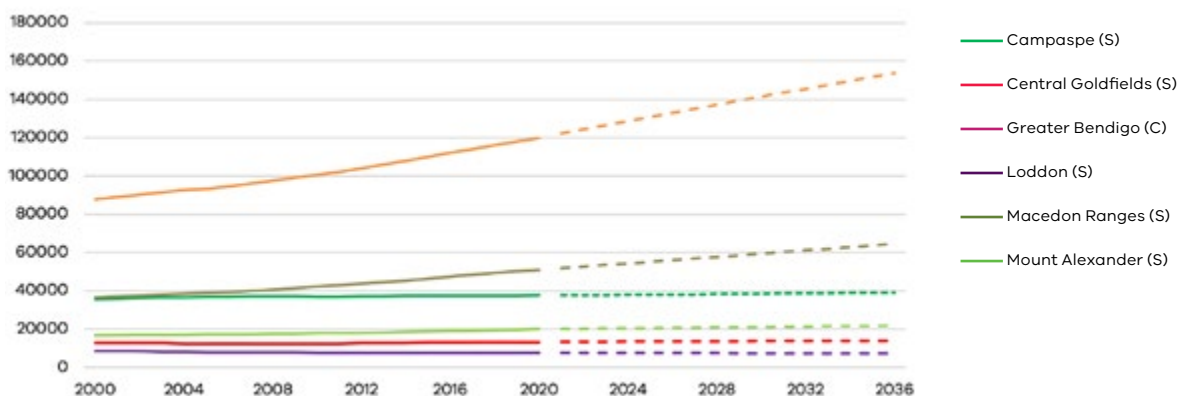
However, only Greater Bendigo and Macedon Ranges experienced growth in all three population drivers. Each of the four remaining LGAs experienced natural decreases (deaths exceeding births). In the case of Echuca and Mount Alexander, inflows of migrants (both domestic and overseas) were sufficiently large to offset declines and ensure net population growth. In contrast, in the case of Central Goldfields and Loddon LGAs, natural decreases led to population decline (see Figure 1.2.4).

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

Figure 1.2.4: Population Change by Components (2019 – 2020)
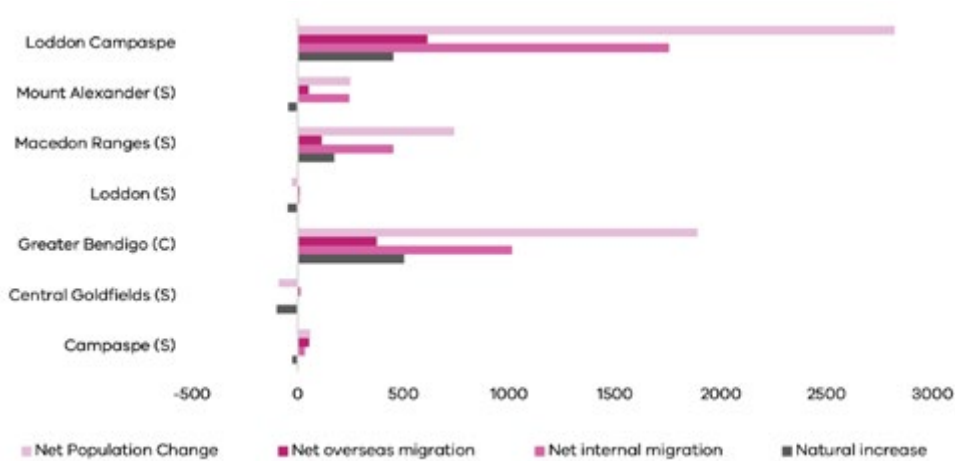
Source: (ABS, 2021)

Regional internal migration

While internal migration is the most significant driver of the region's population growth, trends differ across age groups and geographies (see Figure 1.2.5). Greater Bendigo is the only region to have realised positive net internal migration among people aged between 15 and 24 years. This result is likely supported by the city's relatively strong tertiary education system and a diversified economy, which provides young people with more opportunities than many other regional communities.

In all LGAs excluding Campaspe, the potential impact of young people leaving the area on working age population is offset by inflow of the 25 to 44 years and 45 to 64 years age cohorts. This pattern suggests the region has strong appeal for families and those in the latter part of their careers.

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01 Economic Insights

Figure 1.2.5: Net Internal Migration (Proportion by Age Group), Annual Average (2016 – 2019)
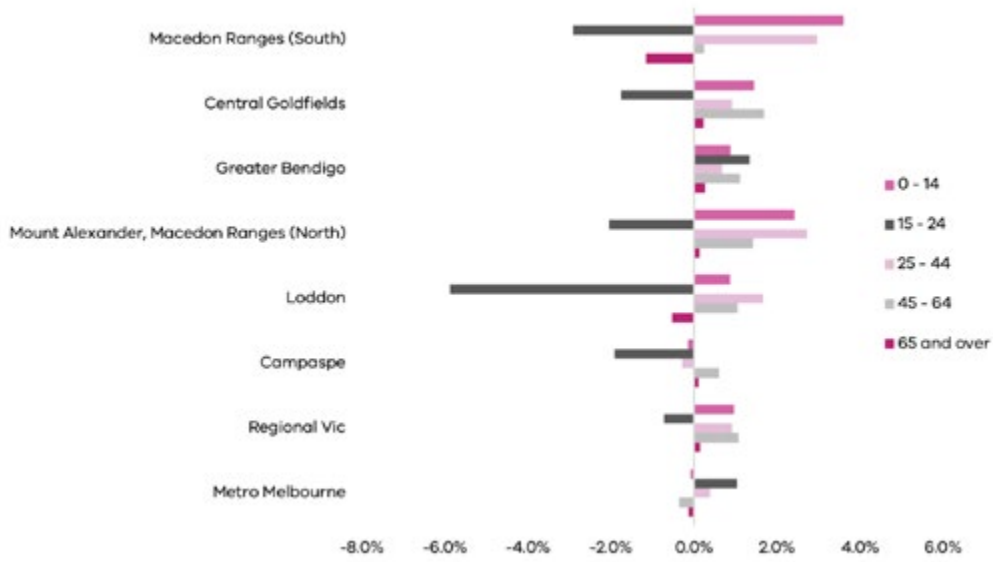
Source: (ABS, 2020b)

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 (SA3) for this measure of regional internal migration. Macedon Ranges is split in half with the southern and northern sides of the LGA represented across different sets here. The south component is closer to greater Melbourne and contains Macedon, Gisborne Lancefield and Romsey whereas the North side contains Woodend and Kyneton.

Population cohort analysis

Loddon Campaspe's population is 50.6 per cent female and 49.4 per cent male. With a median age of 42 years, the region aligns with the median age in regional Victoria (42 years) but exceeds that of metropolitan Melbourne (36 years). The working aged population (15 to 64 years) comprises 61.1 per cent of the population and 20.0 per cent of the population are 65 years or older.

Figure 1.2.6: Population by Age
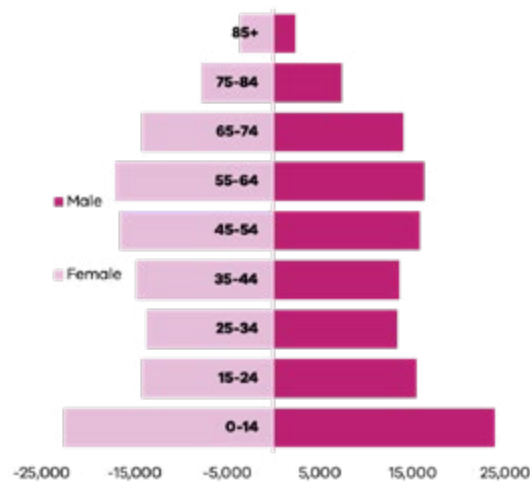
Source: (ABS, 2020c)

1.5 per cent of the region's population are Aboriginal and Torres Strait Islander while 6.3 per cent live with a disability. These proportions are consistent with regional Victorian averages but exceed rates in metropolitan Melbourne. Loddon Campaspe has a relatively low proportion of culturally and linguistically diverse (CALD) people; 4.4 per cent of the population speak a language other than English at home, around 0.7 per cent of people speak a second language and have low to no proficiency in English and 9.8 per cent were born overseas. All these measures of the CALD population are lower than regional Victorian and metropolitan averages (see Figure 1.2.7).

Figure 1.2.7: Population Cohorts

- Aboriginal / Torres Strait Islander
- Core activity need for assistance
- Speaks a language other than english (LOTE) at home
- Speaks LOTE and proficiency in english poor or not at all
- Born overseas
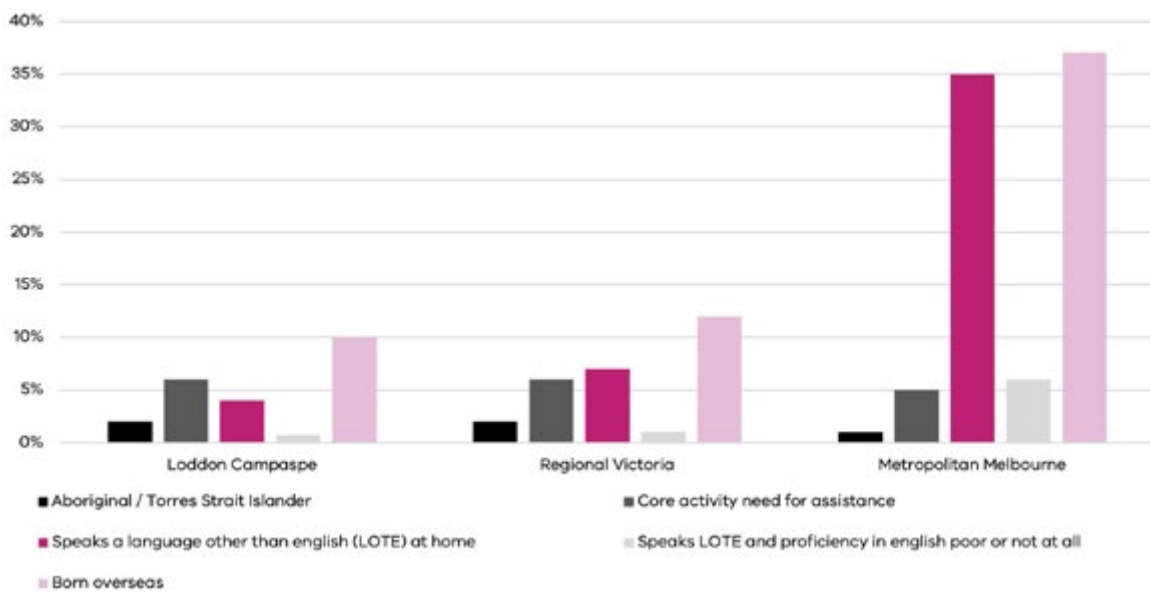
Source: (ABS, 2016a)

1.3
Socio-Economic Profile

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

- As it relates to household incomes and educational attainment, Loddon Campaspe tends to outperform regional Victorian averages however, it is home to some of the most socio-economically disadvantaged LGAs in the state.
- While Macedon Ranges shires are relatively well off, Central Goldfields and Loddon shires underperform the region across all socio-economic measures.
- Relative to the general population rates in Loddon Campaspe, local Aboriginal and Torres Strait Islanders have poorer outcomes across labour force engagement and income measures.

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 Victorian averages, Loddon Campaspe has slightly higher average household incomes. 6 per cent of households earn $2,000 or more each week, 27 per cent earn more than $1,000 but less than $2,000, and 43 per cent earn less than $650. In the regional Victoria case, these proportions are 5 per cent, 27 per cent and 45 per cent respectively, indicating a slight overperformance. However, with 12 per cent earning $2,000 or more, 34 per cent more than $1,000 but less than $2,000, and 34 per cent less than $650, the region significantly lags income levels in metropolitan Melbourne (see Figure 1.3.1)

At an LGA level, household incomes in the Macedon Ranges far exceed regional averages. The distribution of household incomes in the peri-urban municipality are broadly consistent with those of metropolitan Melbourne. At the other end of the spectrum, households in Central Goldfields and Loddon are more likely to be low-income; 64 per cent and 60 per cent of households earn less than $650 per week.

Figure 1.3.1: Household Income Distribution (Weekly)
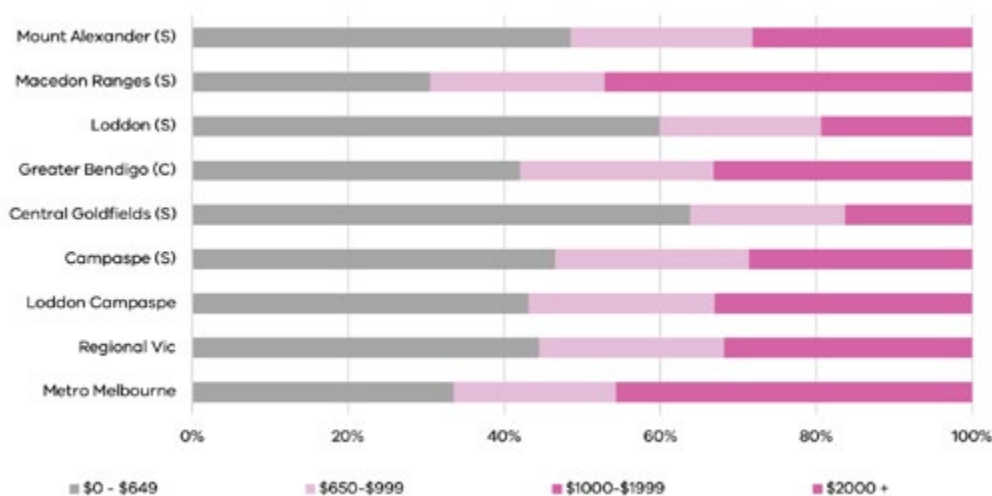
Source: (ABS, 2016b)

Education attainment

Broadly speaking, educational attainment in Loddon Campaspe is consistent with regional Victorian averages however, there is a slightly higher proportion of people with a bachelor's degree or higher qualification (19 per cent compared to 17 per cent) (see Figure 1.3.2). Despite attainment consistency, 11.4 per cent of young people aged 15 to 24 years are not engaged in employment, education or training, slightly higher than the regional Victorian average (11.3 per cent) and the well above the state average (8.6 per cent).

In both cases, the region underperforms metropolitan Melbourne however these differences are likely to reflect the qualification levels required for many of the region's major employing industries, namely Agriculture, Manufacturing and Construction, and may be partly attributable to regional Victoria's older demographic profile. However, there is a growing number of people working in professional services which suggests demand for a skilled workforce will grow.

At an LGA level, residents in Macedon Ranges and Mount Alexander are more likely to progress to tertiary education, particularly to achieve at least a bachelor's degree. In contrast, those in Central Goldfields and Loddon are more likely to have not achieved a tertiary qualification (60 per cent and 59 per cent respectively).

Figure 1.3.2: Educational Attainment (Highest Level)
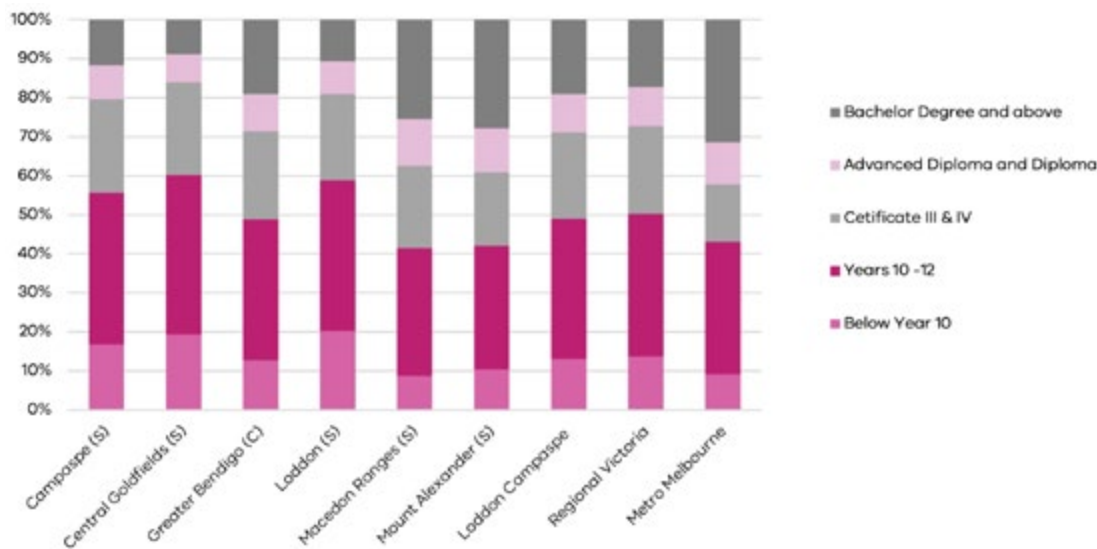
Source: (ABS, 2016c)

Socio-economic Disadvantage

Map 1.3.3: Index of Relative Socio-economic Disadvantage (IRSD)
Rankings (2016)
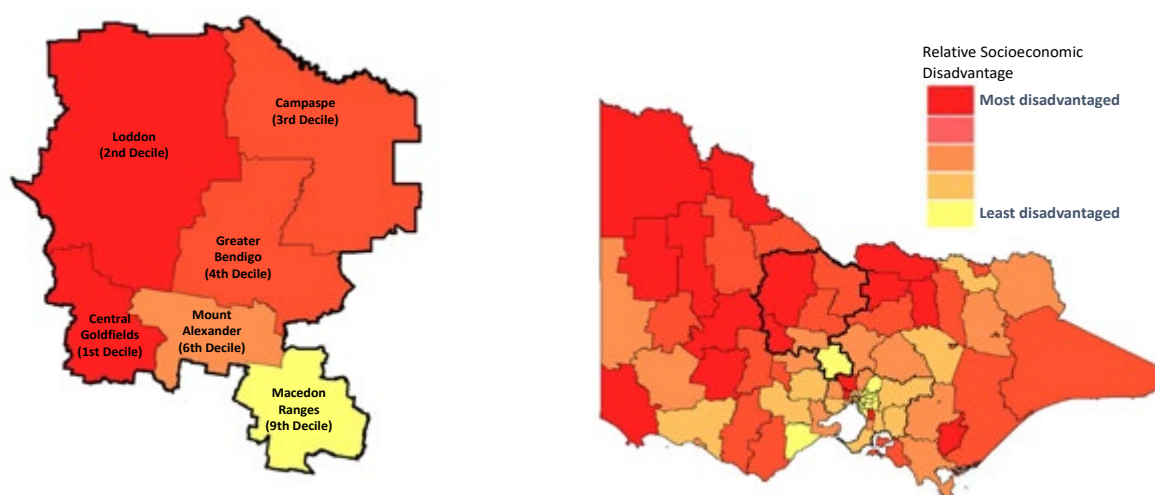
Source: (ABS, 2016d)

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 significantly differ across Loddon Campaspe. Macedon Ranges is the least disadvantaged LGA in the region among the least disadvantaged municipalities in the state. In contrast, Central Goldfields and Loddon are among the most disadvantaged (ranked 1st and 9th out of 80 in 2016).

Between 2011 and 2016, Campaspe, Loddon and Mount Alexander realised improvements in their relative levels of disadvantage. In contrast, Central Goldfields and Macedon Ranges deteriorated while Greater Bendigo maintained its position (see Table 1.3.4).

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

Local Government Area	2016 Rank (of 80)	2016 Decile	2011 Rank (of 80)	
Central Goldfields (S)	1	1	2	▲
Loddon (S)	9	2	4	▼
Campaspe (S)	23	3	20	▼
Greater Bendigo (C)	31	4	31	=
Mount Alexander (S)	42	6	32	▼
Macedon Ranges (S)	71	9	72	▲

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

Aboriginal local communities and Traditional Owners

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

Legend:
- Dja Dja Wurrung People
- Taungurung People
- Wurundjeri People
- Yorta Yorta People

(First Peoples State Relations, June 2021)

Aboriginal and Torres Strait Islanders[9]

The table below (1.3.6) demonstrates performance against a selection of measures 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.

In the Loddon Campaspe region, Aboriginal and Torres Strait Islanders are almost 3 times more likely to be unemployed, with a 16.5 per cent unemployment rate. The labour force participation rate among Aboriginal and Torres Strait Islanders (51.9 per cent) is almost 10 percentage points lower than average. Aboriginal and Torres Strait Islander households are more likely to earn less than $650 per week (57.0 per cent of homes) than average (42.4 per cent of homes).

Furthermore, 28.0 per cent Aboriginal and Torres Strait Islander young people in the region not engaged in work or study. This is significantly higher than the average rate of 11.4 per cent.

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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	Loddon Campaspe
Economic performance	Labour force participation rate (%)	**64.5%** ■	**60.9%** ■	**65.8%** ■	**61.0%** ■
	Aboriginal and Torres Strait Islander Victorians	*57.8%* ■	*52.8%* ■	*62.4%* ■	*51.9%* ■
	Unemployment rate (%)	**6.6%** ▲	**5.9%** ▲	**6.8%** ▲	**5.7%** ▲
	Aboriginal and Torres Strait Islander Victorians	*13.9%* ■	*16.5%* ■	*11.8%* ■	*16.5%* ▼
Disadvantage and shared prosperity	Households earning less than $650 per week (2016 dollars) (%)	**34.8%** ▼	**43.1%** ▼	**31.8%** ▼	**42.4%** ▼
	Aboriginal and Torres Strait Islander households	*47.7%* ▼	*56.6%* ▼	*39.2%* ▼	*57.0%* ▼
	Children in jobless households (%)	**16.4%** ■	**16.5%** ■	**16.3%** ■	**16.1%** ■
	Aboriginal and Torres Strait Islander children in households	*36.3%* ▼	40.9% ▼	*31.4%* ▼	
Cohesive and liveable communities	People aged 15+ who volunteer (%)	**20.9%** ▲	**26.7%** ▲	**18.9%** ▲	**27.4%** ▲
	Aboriginal and Torres Strait Islander Victorians	*19.9%* ▲	19.5% ▲	*20.3%* ▲	*19.2%* ▲
Skills and education	People aged 15–24 not engaged in work or study (%)	**8.6%** *	**11.3%** *	**7.9%** *	**11.4%** *
	Aboriginal and Torres Strait Islander Victorians	*21.7%* *	*25.0%* *	*18.6%* *	*28.0%* *

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.

(ABS Census, 2016)

Shading
(not applied where comparison between regions is uninstructive):

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

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

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

1.4
Labour Market

Improving participation in the labour force is critical for sustaining the region's economic growth prospects. There's latent capacity to improve this, starting with increasing female labour force participation as well as addressing the participation gap in the Aboriginal population in the region. Having a labour force that is ready to meet industry demand will be important in sustaining industries which have comparative advantage, as well as supporting emerging sectors into the future.

While Loddon Campaspe currently has a relatively low unemployment rate, employment growth over the past decade has been sluggish compared to that of Metro Melbourne and regional Victoria.

- Central Goldfields and Loddon have persistently higher unemployment rates compared to the rest of the region, while also experiencing declining GRP per worker. This presents a challenge for both LGAs in terms of addressing disadvantage.

Seven out of 19 employing industries in the region employ 70 percent of the workforce, demonstrating the relative diversity in the regional jobs market.

- The top three employing industries: Health Care, Retail and Construction are projected to grow more than any other industry in the five years to May 2024.
- Employment in Mining and Professional Services have also grown over the past decade, pointing to improved prospects in those sectors, mainly attributable to Greater Bendigo's role as a regional hub and mining centre.

Greater Bendigo's role as a regional hub is reflected by the large number of commuters travelling into the LGA for work. The region's proximity to metropolitan Melbourne also allows a large number of residents to travel into the city for work each week.

- Improving connectivity across the region, to neighbouring regions and Metro Melbourne, will assist in improving labour mobility and access to employment opportunities.

Employment[10]

In 2020 there were 119,593 employed persons (see Figure 1.4.1) within Loddon Campaspe. Health Care and Social Assistance (18,918 workers) was the largest employing sector, followed by Retail Trade (13,216 workers) and Construction (12,550 workers). The top seven employing industries account for almost 70 per cent of the region's workforce. Among sub-industries, Construction Services is the largest employing sector (8,453 workers), accounting for over seven per cent of all workers in the Loddon Campaspe region and 67 per cent of all workers within the Construction sector (see Figure 1.4.2).

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 1.4.1: Employment by Industry
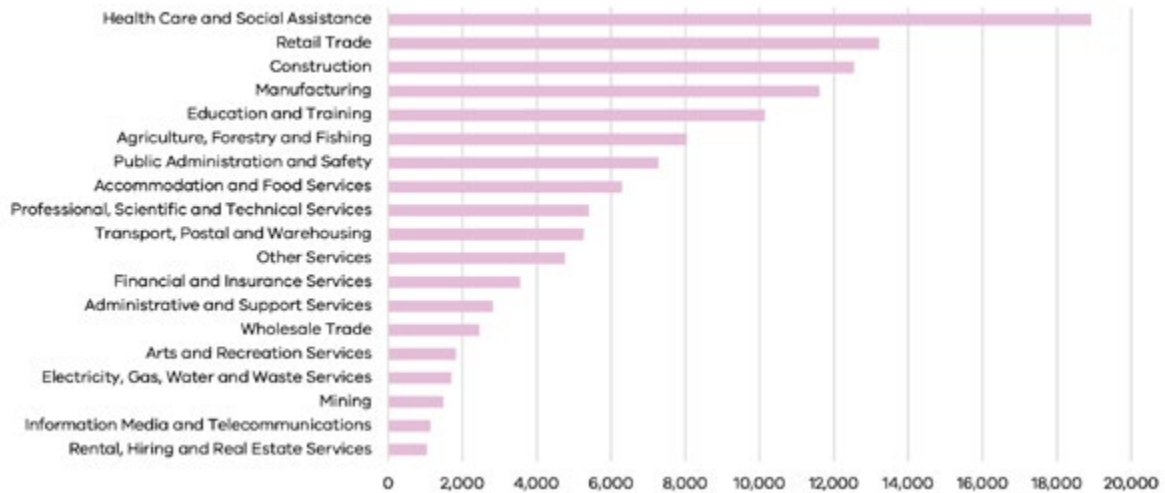
Source: (NIEIR, 2020)

Figure 1.4.2: Subindustry Employment (Proportion of Top 5 Industries)
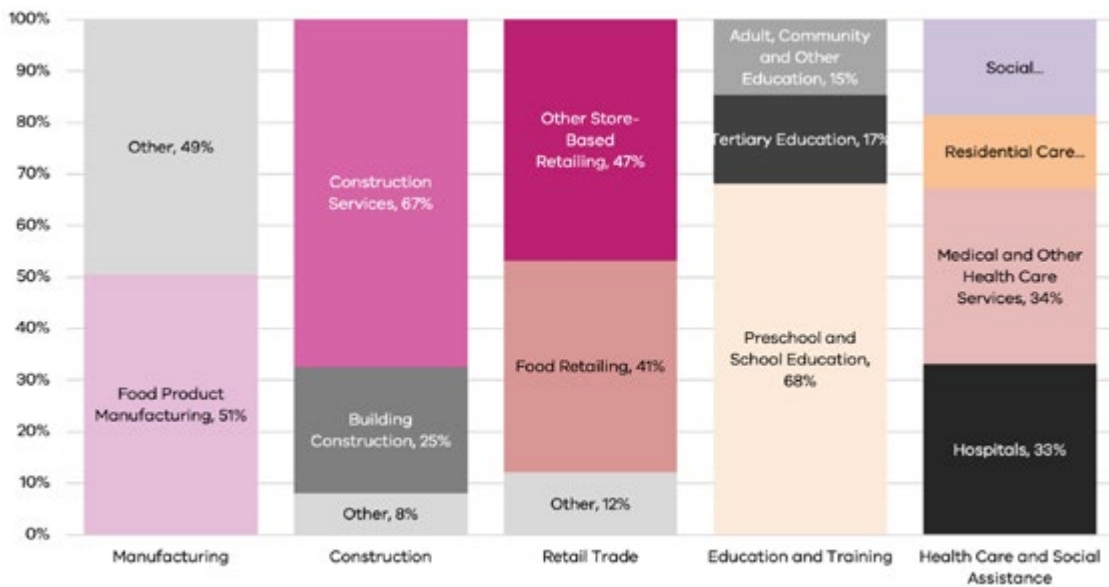
Source: (NIEIR, 2020)

The 10-year annual average annual growth rate from 2011 to 2020 for employment in Loddon Campaspe was 1.3 per cent. This was higher than regional Victoria (1 per cent), but lower than metropolitan

Melbourne (2.1 per cent). 14 of the 19 industries in the region experienced an increase in the number of workers over the last 10 years (see Figure 1.4.3)

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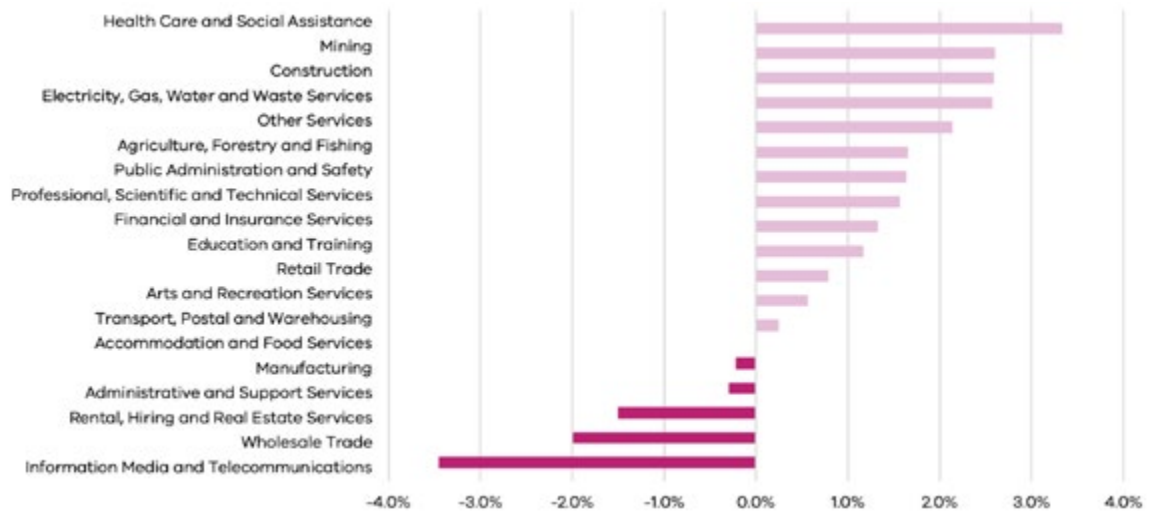
Source: (NIEIR, 2020)

Pre-COVID projections of employment (see Figure 1.4.4) forecast employment to increase by 9.7 per cent, driven by employment in Health Care and Social Assistance and Construction. While no industries are expected to see a decline in employment, Information Media and Telecommunications is expected to remain unchanged. However, due to the significant disruptions caused by COVID-19, employment outcomes will now be significantly different from those expected.

Figure 1.4.4: Projected change in employment ('000), Bendigo SA4, 2019–2024
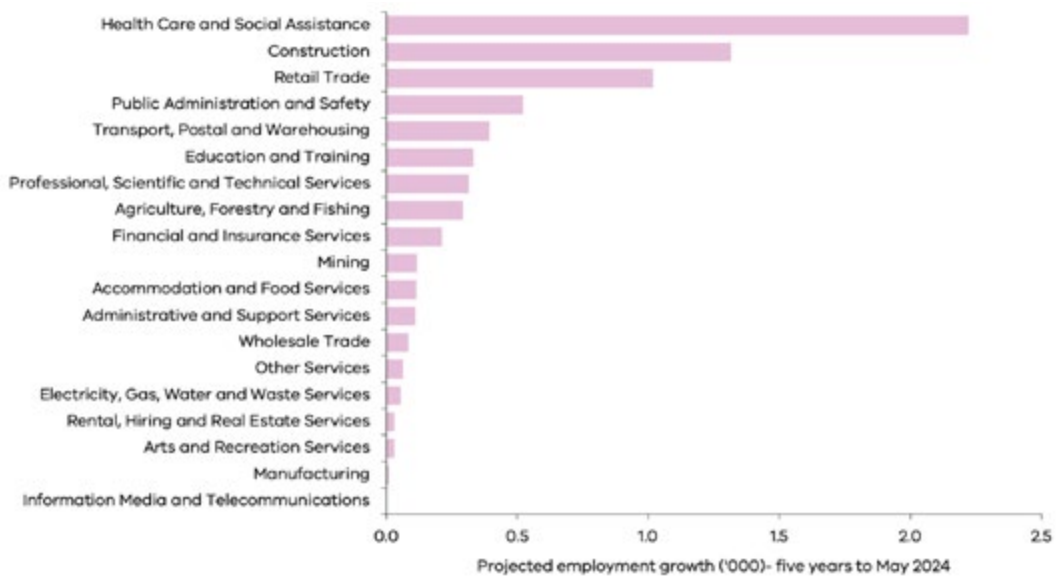
Source: (National Skills Commission, 2020)

In Loddon Campaspe, 36 per cent of the workforce works part time (see Figure 1.4.5). This rate is slightly lower than the average for regional Victoria (35 per cent) however, it is higher than 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 London Campaspe has been more volatile than that of regional Victoria and metropolitan Melbourne (see Figure 1.4.6).

Prior to the onset of the COVID pandemic (March quarter 2020), the unemployment rate in the region was 4.1 per cent. This was higher than the unemployment rate in regional Victoria (3.9 per cent), however below metropolitan Melbourne (5.2 per cent).

The region's long-term unemployment rate (December Qtr 2010 to March Qtr 2021) is 5.4 per cent; just above that of regional Victoria (5.3 per cent) and metropolitan Melbourne (5.8 per cent).

Unemployment rate estimates since COVID has seen the unemployment rate in the region rise to 5.2 per cent, just above the regional average.

Unemployment rates have fluctuated significantly across LGAs, however some remain persistently high (see Figure 1.4.7). For example, at March 2021, Central Goldfields Shire's unemployment rate was 10.9 per cent, whilst Macedon Ranges was 4.1 per cent. .

Figure 1.4.6: Unemployment Rate by Region (2011–2020)
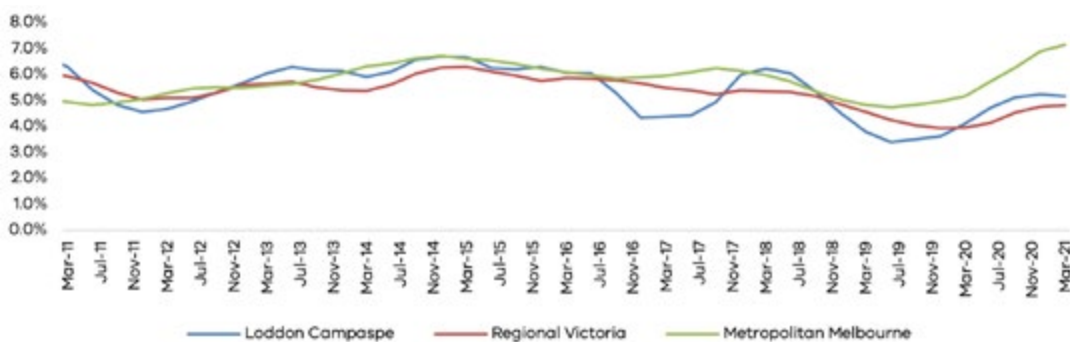
Source: (National Skills Commission, 2021)

Figure 1.4.7: Unemployment Rate by LGAs
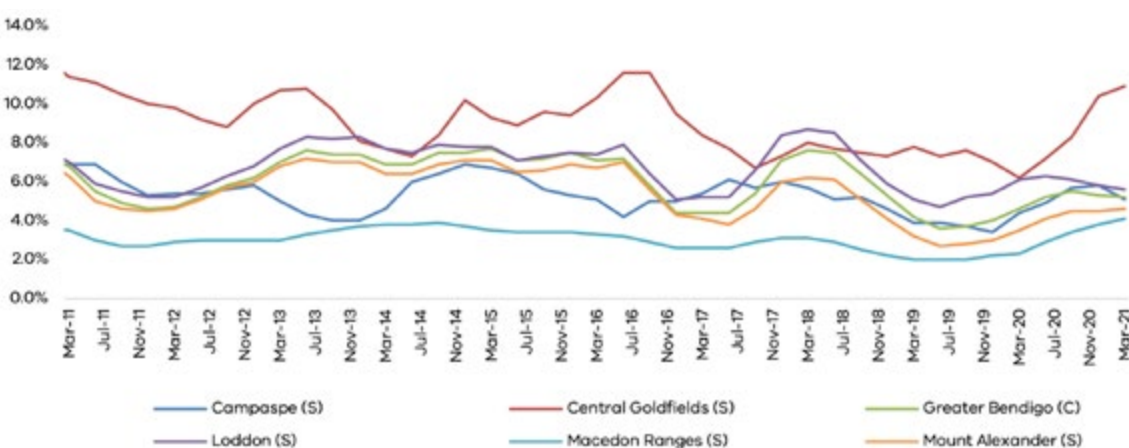
Source: (National Skills Commission, 2021)

Participation rate

The labour force participation rate in Loddon Campaspe (61.0 per cent) is slightly higher than regional Victoria (60.9 per cent) however significantly below that of Greater Melbourne (65.8 per cent) (see Figure 1.4.8). This is driven by higher participation rates across most age groups (see Figure 1.4.9) in comparison with regional Victoria, while rates among those aged between 25-34 lag metropolitan Melbourne.

Figure 1.4.8: Participation Rate (2016)
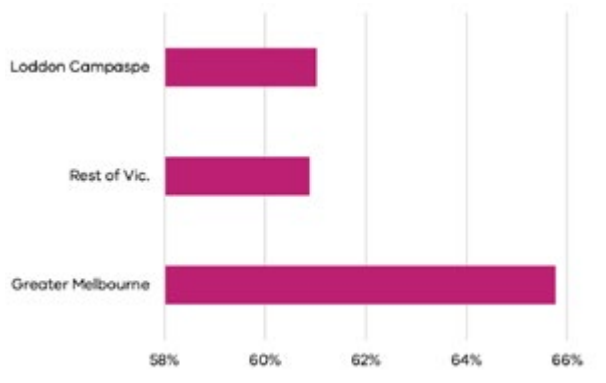
Figure 1.4.9: Participation Rate Age Comparison
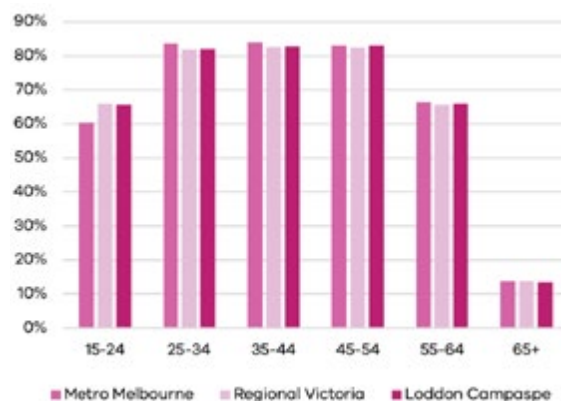
Source: (ABS Census, 2016)

The female labour force participation rate in Loddon Campaspe (57.1 per cent) is significantly lower than the male participation rate (61.3 per cent), which is consistent across the state. The divide in participation may be due to barriers to entering the workforce such as childcare access and affordability. Additionally, both the male and female participation rates are well below their respective participation rates in both metropolitan Melbourne and regional Victoria. This presents an opportunity to boost future economic growth if participation rates among woman would be lifted and employment opportunities could be found. (see Figure 1.4.10).

Figure 1.4.10: Participation Rate by Gender (2016)

Source: (ABS Census, 2016)

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

Between 2001 and 2013, labour productivity in the Loddon Campaspe region contracted, in line with the decline registered across regional Victoria. Between 2013 and 2015 the region experienced growth in productivity, nearly reaching levels of regional Victoria as a whole, before declining again until 2020. This contrasts with metropolitan Melbourne, which has seen a steady increase in GRP per worker over the same period (see Figure 1.4.9).

While most councils have seen minor movements in GRP per worker over the past 20 years, Loddon has experienced very large declines, starting from a high base and approaching the regional average. This was driven by falls in Agriculture value add with the region significantly impacted by the Millennium drought over this time.

Figure 1.4.11:
Labour Productivity by Region
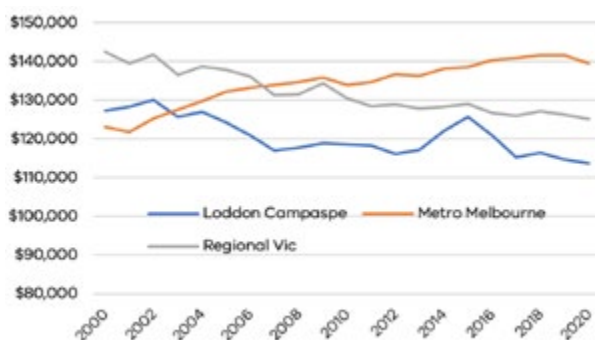
Figure 1.4.12:
Labour Productivity by LGA
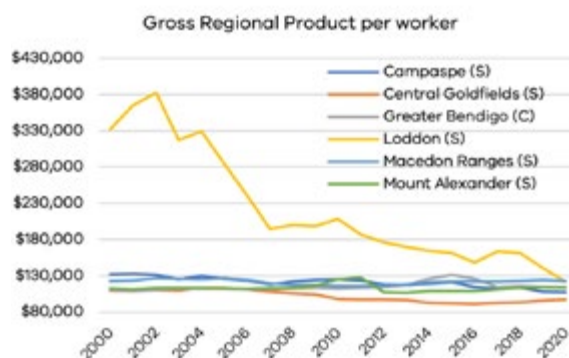
(NIEIR, 2020)

Worker mobility and commuting across regions

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

Greater Bendigo has the largest proportion of local jobs filled by local residents (92 per cent), which is referred to as self-sufficiency. In comparison, Mount Alexander has the smallest share at 64 per cent (see table 1.4.13), likely due to the regions border with metropolitan Melbourne.

Consequently, there is also large variations in the proportion of workers who work within their local LGA, referred to as self-containment. For example, in Greater Bendigo, 89 per cent of working residents are employed in Greater Bendigo LGA. This is significantly higher than the self-containment rate in Macedon Ranges where only 45% of people who live in shire work there.

While Macedon Ranges has the lowest self-containment rate across the region, Loddon Campaspe's proximity to metropolitan Melbourne and established passenger train connections supports a large number of residents to commute into the city for work across many LGAs (see Table 1.4.14)

Table 1.4.13: Labour mobility

	Campaspe (S)	Central Goldfields (S)	Greater Bendigo (C)	Loddon (S)	Macedon Ranges (S)	Mount Alexander (S)
Total local workers (working anywhere) (UR)	15,946	4,358	48,675	2,835	21,743	7,559
Number of jobs in local area (POW)	15,286	4,113	45,051	2,649	12,672	6,913
Number of local jobs held by locals	12,211	3,348	41,242	1,918	9,112	4,448
Number of locals employed outside LGA	3,735	1,010	7,433	917	12,631	3,111
Employment Self containment	80%	80%	89%	70%	45%	62%
Employment Self Sufficiency	80%	81%	92%	72%	72%	64%

Source ABS, Census 2016

Table 1.4.14: Labour mobility across LGAs

Place of work → / Place of residence ↓	Campaspe (S)	Central Goldfields (S)	Greater Bendigo (C)	Loddon (S)	Macedon Ranges (S)	Mount Alexander (S)	Outside LC
Campaspe (S)	12,211	0	295	22	0	0	2,764
Central Goldfields (S)	0	3,348	98	39	12	170	498
Greater Bendigo (C)	377	115	41,242	437	317	1,593	2,495
Loddon (S)	23	63	457	1,918	4	28	242
Macedon Ranges (S)	6	0	318	4	9,112	204	10,801
Mount Alexander (S)	5	116	1,094	20	430	4,448	1,045
Outside LC	2,658	471	1,523	209	2,790	464	

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

Rising employment in skilled occupations is expected to support reductions in the region's level of disadvantage. This increase in skills demand reflects the changing nature of the region's industry structure as demand for professional services, education and health care workers grow.

- 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.
- However, this is dependent on the development of opportunities to boost jobs and support employers to upskill local workers.

Occupation

In 2021, 66,000 workers in Loddon Campaspe were classified as working in skilled occupations, representing 62.3 per cent of the local workforce. As a share of total workforce, the region has a similar share of skilled workers as regional Victoria (62.2 per cent) and considerably less than metropolitan Melbourne (67.3 per cent).

In the five years to 2021 the number of skilled workers increased by 5,200 workers or 8.6 per cent, while the number of low skilled workers decreased by 1,800 workers or 4.3 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.

Sales assistants (General) was the largest employing occupation in Loddon Campaspe, with Registered Nurses and Livestock Farmers rounding out the top three. Furthermore, seven of the top ten employing occupations experienced an increase in employment.

Of the top ten employing industries, seven were skilled occupations, of which all, bar Aged and Disability Carers experienced growth in total workers between 2016 and 2021.

Table 1.5.1: Top 10 employing occupations

Loddon Campaspe	2021	2016	Change	Skill level*
Sales Assistants (General)	6,600	6,800	-200	Low Skilled
Registered Nurses	3,900	3,300	600	Skilled
Livestock Farmers	3,700	3,700	0	Skilled
Retail Managers	3,000	2,400	500	Skilled
Primary School Teachers	2,700	2,200	500	Skilled
General Clerks	2,400	2,300	100	Low Skilled
Secondary School Teachers	2,300	1,800	400	Skilled
Truck Drivers	2,000	2,000	-0	Low Skilled
Receptionists	1,800	1,800	0	Skilled
Aged and Disabled Carers	1,800	1,900	-100	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)

02
Comparative Advantage

The historical economic performance of a region serves as a good indicator of the industries which have a 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 the Agriculture, Forestry and Fishing, Mining, Manufacturing and Health Care and Social Assistance, as represented by both high levels of employment specialisation, GVA specialisation, and some business clustering. This suggests the region has some local factors which may lead to further 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 (Loddon Campaspe Industry Profile 2019) found the region has considerable endowments across a range of attributes:

2.1
Transport Infrastructure

Loddon Campaspe is to the North- West of Melbourne and is well connected to the state capital through an extensive road and rail network (see Figure 1.6.1). These networks connect the region to the ports at Melbourne, Geelong and Portland and are important to support economic activity to occur with both interstate and international markets.

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

- the Calder Freeway which connects Melbourne to Mildura via Bendigo,
- the Midland Highway which connects the regional centres of Geelong, Ballarat, Bendigo, Shepparton, Wangaratta, and Mansfield,
- Loddon Valley Highway,
- the McIvor Highway,
- the Pyrenees highway,
- the Northern highway and
- the Wimmera Highway.

The region also has a direct passenger and freight rail network that connects Maryborough (via Ballarat), Swan Hill, Echuca and Bendigo to Melbourne. It also includes freight rail movements from the Mildura, Kulwin and Robinvale lines that travel via Dunolly, Maryborough and Ballarat to Melbourne, Geelong and Portland (Infrastructure Victoria, 2019).

The region has an airport just outside of Bendigo which supports commercial and light aircraft. Prior to the pandemic, Qantas was running seven weekly return services in the Bendigo to Sydney route. There is also access via road networks to Avalon and Tullamarine international airports.

Figure 2.2.1: Transport Infrastructure

Source: (Infrastructure Victoria, 2019)

2.2
Digital Infrastructure[12]

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

Table 2.2.1: ADII score comparison 2021, VIC

Local Government Area	Score
Campaspe	64.0
Central Goldfields	61.0
Greater Bendigo	70.0
Loddon	58.0
Macedon Ranges	71.0
Mount Alexander	64.0
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, Loddon Campaspe
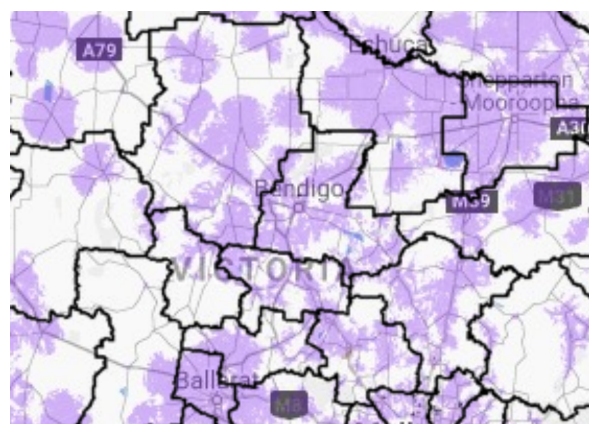
(NBNco, 2020)

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

- Increased need for better home connectivity to support remote work, learning and tele health

- Need for better mobile and broadband connectivity for areas identified as Growth Corridors to support industrial growth and digitisation

- Need for connectivity during natural disasters and emergencies

- Competitive internet speeds are needed to attract businesses, new residents, and tourism

- Need to address some areas which have inadequate bandwidth to run critical business applications and even receive mobile calls

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

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

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

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

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

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

(Infrastructure Victoria, 2019)2.3
Natural Endowments

2.3
Natural Endowments

Across the Loddon Campaspe region, land use is predominantly split between primary production and parkland use (see Figure 2.3.1). However Mount Alexander has the largest proportion of other land use which may be driven by amenity farming, tourism uses, and other urban uses not otherwise classified. (Infrastructure Victoria, 2019).

Figure 2.3.2 provides a spatial understanding of the region's land use and further detail on the activity. The South East of the region has higher rates of urban and grazing land use, while the north west and north east regions have higher rates of cropping and dairy land use respectively.

As Melbourne's urban fringe expands, it is expected the South-East of the regions will see more land used for urban activity. This is likely to cause contested land use between agricultural uses and residential / industrial use.

Figure 2.3.1: Land use by LGA, Loddon Campaspe
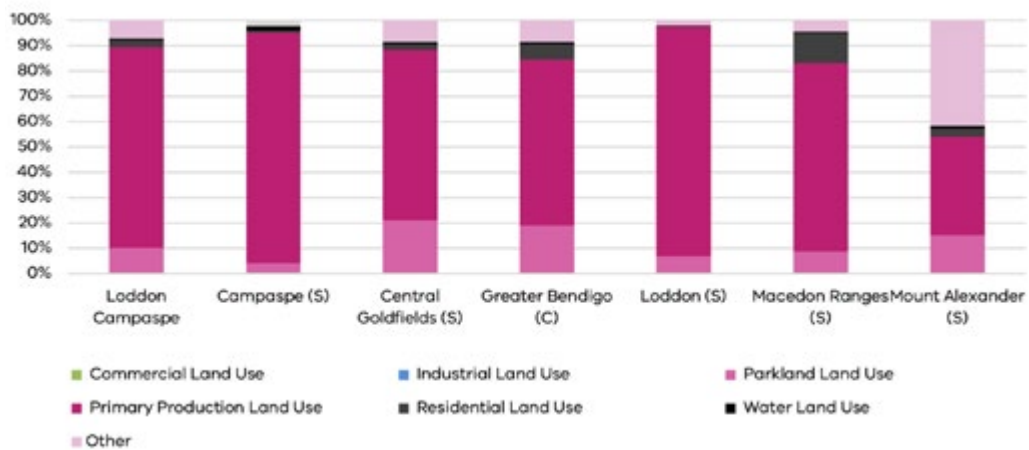
Source: (ABS, 2017)

Figure 2.3.2: Spatial Map of Land Use

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

(Agriculture Victoria , 2020)

Environmental Assets

Around 10% of Loddon Campaspe's land is classified as public land and parkland. This land provides economic, environmental, and social value to the region (refer to table 1.6.6 and Figure 2.3.3). The environmental assets are diverse, including River Red Gum forests, Box-Ironbark, Black Box forest communities, grasslands, grassy woodlands and various lakes, rivers and wetlands. (Infrastructure Victoria, 2019). Many of these sites are associated with Aboriginal Cultural heritage sites and other historical sites such as former Victorian Gold Rush sites. These sites are both important to local communities as well as providing attractions for regional tourism.
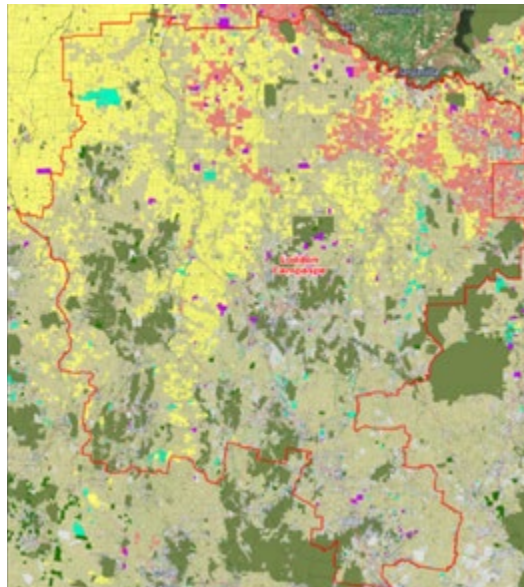
Table 2.3.3: Key Environmental Assets, Loddon Campaspe

National Parks	**State Forest and State Parks**	**Other**
• Gunbower National Park and State Forest. • Castlemaine Diggings National Heritage Park • Heathcote-Graytown National Park • Greater Bendigo National Park • Terrick Terrick National Park.	• Kooyoora State Park • Paddys Ranges State Park • Mount Alexander Regional Park • Macedon Regional Park • Rushworth-Heathcote State Forest • Leaghur State Park.	• Aboriginal cultural heritage sites including Lake Boort, Kooyoora State Park, Mount Tarrengower and Terrick Terrick National Park. • Regional Parks including Mount Alexander Regional Park • Wychitella Nature Conservation Reserve Victorian Gold Rush sites

Figure 2.2.4: Key Environmental Assets, Loddon Campaspe
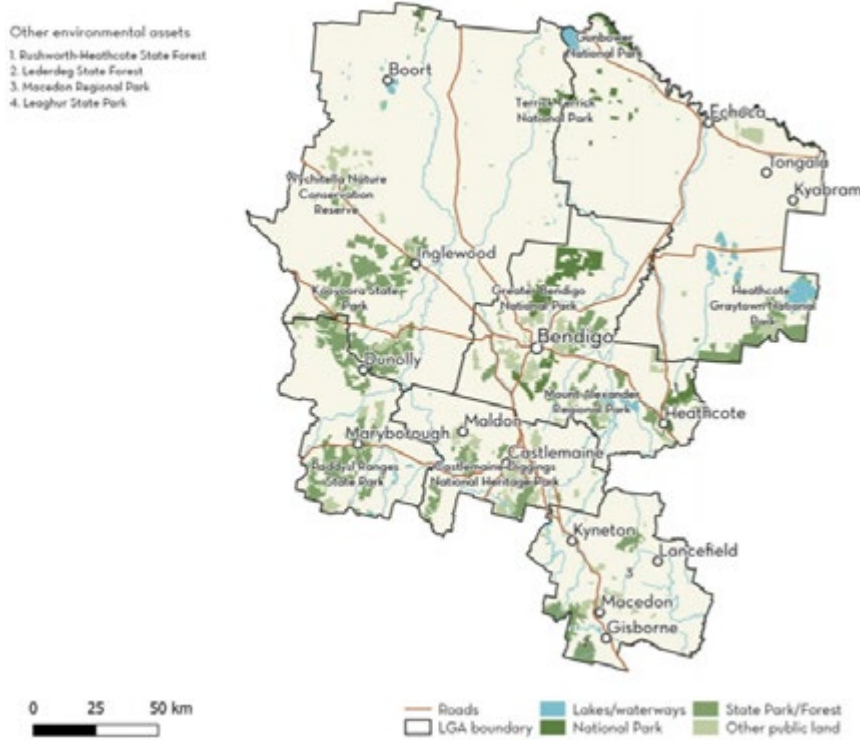
Source: (Infrastructure Victoria, 2019)

Mineral resources and forestry

The Loddon Campaspe region has historically been a strong gold mining region and is home to the state's largest gold mine; the Fosterville mine located just outside of the City of Bendigo. Other than gold, the region has mineral sand and stone which provides advantages in cost effective construction. The Loddon Campaspe region also supports commercial forestry industry with Box-Ironbark forest located throughout the region (State Government of Victoria, 2014).

Renewable energy

There is considerable solar energy generation potential which has begun to be capitalised through rooftop solar uptake, ranging from 25.4% of roofs in Macedon ranges to 31.7% in Mount Alexander as at 2019. Solar farms have had less uptake in Loddon Campaspe compared to the neighbouring Mallee region, however there are some smaller scale projects underway. Loddon Shire currently has an operating 0.5MW capacity solar farm (Raygen Heliostatic), as well as a number of small and medium sized solar farms with planning approval in Loddon and Campaspe shires. (DELWP, 2019). However the northern parts of the region have a higher level of megajoules (mj) per sqm of solar resources from their sunnier locations.

While there is opportunity to generate significant amounts of solar power in the region, there are barriers. The renewable energy roadmap for the region identified weak to very weak transmission infrastructure as a significant barrier (DELWP, 2019).

While the region is less conducive to wind power generation than other coastal regions, as at 2019 there was 27kW capacity wind farm in the Loddon shire. There is also small-scale bioenergy energy in use across the region, utilising a wide range of agriculture and forestry feedstock. (DELWP, 2019).

The uptake of renewable energy has been driven at the local level by a large number of small community energy groups, mainly in Bendigo, Mount Alexander, Macedon Ranges, and Goulburn Valley community energy in Campaspe shire. Community renewable energy projects are owned and run by local communities and are diverse and can include solar panels or hot water bulk buys, micro or mini grids, community-owned solar or wind farms or electricity retailers. (DELWP, 2019).

03
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04
Strategic context

Loddon Campaspe Regional Economic Development Strategy

The following table describes the local strategies, plans and frameworks that shaped the Loddon Campaspe 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

Loddon Campaspe Economic Growth Strategy 2019	
Purpose	Promotes broad direction to assist in focusing action and advocacy efforts on activities that will benefit the local economy
Identified priorities	• Strong regional food industry • Industries of the future — Enablers (workforce, collaboration, new businesses, land planning) • Industries of the Future — Growth sectors (health sector, renewable energy, waste and resource recovery) • Regional employment and innovation corridor • Visitor and international economy • Bendigo the Regional Capital
Influence on the REDS strategic directions	✔ **Agriculture and food product manufacturing** ✔ **Visitor economy** ✔ **Employment and innovation corridor** ✔ **Job ecosystem** ✔ **Renewable energy and waste**

Loddon Campaspe Regional Digital Plan 2019	
Purpose	Identifies gaps and opportunities across the region's digital landscape and makes recommendations to address gaps and to realise the region's full digital potential
Identified priorities	• Favourable geography to support high-capacity infrastructure deployment • Sophisticated business users driving demand for skills and services • Collaborative business and community environment • High-capacity digital infrastructure already in place
Influence on the REDS strategic directions	✔ **Agriculture and food product manufacturing** **Visitor economy** ✔ **Employment and innovation corridor** **Job ecosystem** **Renewable energy and waste**

Loddon Campaspe Regional Partnership Outcomes Roadmap 2019	
Purpose	Outlines the long-term outcomes and the challenges associated with achieving them
Identified priorities	• A growing economy • Health heart of Victoria • Create the best start for every child • Youth our critical asset • A great environment to live • A connected region
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	✔ **Visitor economy**
	✔ **Employment and innovation corridor**
	✔ **Job ecosystem**
	✔ **Renewable energy and waste**

Loddon Mallee Regional Renewable Energy Roadmap 2019	
Purpose	Promotes broad direction to assist in focusing action and advocacy efforts on activities that will benefit the local economy
Identified priorities	• Enhance grid infrastructure and realise the region's solar potential • Maximise community benefit by sharing and maintaining social licence • Coordinate and optimise Distributed Energy Resources • Maximise the potential for bioenergy • Support community energy • Understand the opportunities for emerging technologies • Be proactive about future jobs and training needs
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	Visitor economy
	Employment and innovation corridor
	Job ecosystem
	✔ **Renewable energy and waste**

100 Gig City Region; Increasing the social and economic competitiveness of the Loddon Campaspe region
Regional Development Victoria 2020

Purpose	Explores the concept of a '100-Gig City' region and reports on: potential benefits from case studies, existing infrastructure and how the region could become a 100-Gig City region
Identified priorities	• Establish a Gig City model in Bendigo • Expand the Gig City model in cities with VicTrack fibre optic • Establish fibre optic assets in Echuca and Maryborough • Funding Gig Cities

Influence on the REDS strategic directions		
		Agriculture and food product manufacturing
		Visitor economy
✔		**Employment and innovation corridor**
		Job ecosystem
		Renewable energy and waste

How work works: getting young people employment in our growing industries
Loddon Campaspe Regional Partnership 2020

Purpose	Youth-led consultation and research process to articulate practical action that could help young people to find employment in the Loddon Campaspe area
Identified priorities	• Commit to building a pipeline of younger workers into growing industries in recovery planning • Fund a rural careers education model so young people can meeting employers early in school • Develop work experience and gap-year internships for young people affected by COVID-19 • Create a regional jobs information portal • Ensure every young people leave school with a driver's licence, safety training, a LinkedIn profile and basic financial literacy

Influence on the REDS strategic directions		
		Agriculture and food product manufacturing
		Visitor economy
		Employment and innovation corridor
✔		**Job ecosystem**
		Renewable energy and waste

Voice of Our Youth
Loddon Campaspe Regional Partnership 2020

Purpose	A youth consultation project that engaged 12.5% of young people aged 12–25 in the Loddon Campaspe region on their experience of the education system
Identified priorities	• Invest in youth mental health prevention and intervention programs • Continue efforts to effectively address bullying • Develop strategies and systems to assist in the reduction of stress caused at school • Strengthen vocational education in Victoria and improve mainstream education offerings • Address disengagement through alternative education centres/models

Influence on the REDS strategic directions		
		Agriculture and food product manufacturing
		Visitor economy
	✔	Employment and innovation corridor
	✔	Job ecosystem
		Renewable energy and waste

Loddon Campaspe Food industry supply chain analysis and identifies opportunities Summary
2020

Purpose	Part of the Food Industry Supply Chain analysis program, which seeks to identify potential demonstration projects to demonstrate the potential of the food industry in the Loddon Campaspe region
Identified priorities	Sector and supply chain opportunities in: • Grains and bakery supply chains • Meat supply chains • Poultry supply chains • Fruit and vegetable supply chains • Dairy supply chains

Influence on the REDS strategic directions		
	✔	Agriculture and food product manufacturing
		Visitor economy
		Employment and innovation corridor
		Job ecosystem
		Renewable energy and waste

Loddon Campaspe Health Sector Skills and Pathways Road Map
Loddon Campaspe Regional Partnership 2012

Purpose	Is a guide for government, education, industry, students and parents to strengthen the regional learning system for the health sector, so that participants are better equipped to meet the current and future workforce needs
Identified priorities	• Enhance collaboration between industry, education and community • Address perception • Address skill shortage • Grow our own

Influence on the REDS strategic directions	
	Agriculture and food product manufacturing
	Visitor economy
	Employment and innovation corridor
✔	Job ecosystem
	Renewable energy and waste

Regional Engineering and Advanced Manufacturing Skills Road Map
Loddon Campaspe Regional Partnership 2019

Purpose	Identifies short- and long-term initiatives to support future workforce needs in manufacturing and engineering
Identified priorities	• Address the perception of the industry • Support industry to develop a highly skilled workforce • Strengthen ties between education and industry • Develop leadership capacity

Influence on the REDS strategic directions	
	Agriculture and food product manufacturing
	Visitor economy
✔	Employment and innovation corridor
✔	Job ecosystem
	Renewable energy and waste

Dhelkunya Dja — Dja Dja Wurrung Country Plan	
Purpose	Outlines aspirations for the future of the Dja Dja Wurrung people, including the vision for the Dja Dja Wurrung to be political empowered with an established place in society, and being capable of managing our own affairs from a strong and diverse economic base
Identified priorities	• Djaara (people) • Cultural Practices and Customs • Cultural Heritage • Bush Tucker (edible and medicinal plants and animals) • Rivers and Waterways • Land • Self-determination • Traditional Owner Economy • Joint Management

Influence on the REDS strategic directions	✔ Agriculture and food product manufacturing
	✔ Visitor economy
	  Employment and innovation corridor
	  Job ecosystem
	  Renewable energy and waste

Dja Dja Wurrung — Self Determination Principles	
Purpose	Provides a framework for the rights of Dja Dja Wurrung people in accordance with the Recognition and Settlement Agreement (Native Title)
Identified priorities	• Culture • Partnerships • Look After Country • Traditional Knowledge • Economic
Influence on the REDS strategic directions	Agriculture and food product manufacturing Visitor economy Employment and innovation corridor Job ecosystem Renewable energy and waste

04 Strategic context

Dja Dja Wurrung Aboriginal Corporation — Corporate Strategy

Purpose	Sets out the actions required to deliver the aims and objectives of the Corporation, consolidating an array of governance and strategic document
Identified priorities	• Djaara (people) • Cultural Practices and Customs • Cultural Heritage • Bush Tucker (edible and medicinal plants and animals) • Rivers and Waterways • Land • Self-determination • Traditional Owner Economy • Joint Management
Influence on the REDS strategic directions	**Agriculture and food product manufacturing** **Visitor economy** **Employment and innovation corridor** **Job ecosystem** **Renewable energy and waste**

Dja Dja Wurrung Aboriginal Corporation — Business Plan

Purpose	Sets out the key achievements of the corporation and its objectives for 2021–22
Identified priorities	• Djaara (people) • Cultural Practices and Customs • Cultural Heritage • Bush Tucker (edible and medicinal plants and animals) • Rivers and Waterways • Land • Self-determination • Traditional Owner Economy • Joint Management
Influence on the REDS strategic directions	**Agriculture and food product manufacturing** **Visitor economy** **Employment and innovation corridor** **Job ecosystem** **Renewable energy and waste**

Yorta Yorta Nation Strategic Plan
2019

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

Taungurung Land and Waters Council Aboriginal Corporation Strategic Plan
2016–20

Purpose	One-pager laying out the vision, values, objectives, key strategies and indicators of success for the Taungurung Traditional Owners
Identified priorities	• Vision: Protecting our rights; Building our future • Values: Celebrating Taungurung identity, engaging with respect, influencing with integrity, driving change through leadership • Objectives: Supporting our mob, progressing out interests, growing our business, implementing our agreement
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	Visitor economy
	Employment and innovation corridor
	Job ecosystem
	Renewable energy and waste

Taungurung Land and Waters Council Aboriginal Corporation Country Plan

Purpose	The Country Plan provides an outline of Taungurung Country, Culture and People, and communicates Taungurung vision and aspirations
Identified priorities	• Identity, recognition and rights • Health and wellbeing • Cultural heritage • Taungurung traditional knowledge • Caring for our Country • Economic independence (focus on self-determination, business growth in areas of expertise, securing rights to natural resources)
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	Visitor economy
	Employment and innovation corridor
	Job ecosystem
	Renewable energy and waste

Loddon Mallee South Regional Growth Plan (Vic Gov)
2014

Purpose	Provides a regional approach to land use planning in the Loddon Mallee South region and provides detailed planning frameworks for key regional centres Does not include Campaspe Shire
Identified priorities	• Manage our population growth and settlements • Strengthen out communities, especially out small towns • Strengthen and diversify our economy • Improve our infrastructure • Improve education and training outcomes • Protect and enhance out natural and built environment • Ensure our food, water and energy security • Collaborate to achieve our region's goals
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	✔ **Visitor economy**
	✔ **Employment and innovation corridor**
	✔ **Job ecosystem**
	✔ **Renewable energy and waste**

Loddon Mallee North Regional Growth Plan Vic Gov)
2014

Purpose	Provides a regional approach to land use planning in the Loddon Mallee North region and establishes a framework for strategic land use and settlement planning to sustainably accommodate growth
	Includes Campaspe Shire

Identified priorities

- Align population and economic growth
- Enable healthy lifestyles
- Support and manage our rural landscapes
- Be custodians of the region's environmental and cultural heritage assets and minimise its expose to natural hazards
- Protect and provide a local sense of place
- Develop a living network of towns
- Strategically retain, renew and build infrastructure to support growth and enable health and supportive communities
- Realise opportunities to strengthen and diversify the regional economy

Influence on the REDS strategic directions	✔	**Agriculture and food product manufacturing**
	✔	**Visitor economy**
		Employment and innovation corridor
	✔	**Job ecosystem**
		Renewable energy and waste

A stronger Greater Bendigo 2030; Where all people can thrive
City of Greater Bendigo 2020

Purpose	An action plan for the region's future including planning for sustained population growth, a robust and diversified economy and a place where people can enjoy exceptionally high quality of life

Identified priorities

- Grow sustainable jobs and investment
- Increase liveability for all
- Better link jobs, education, skills and training offerings to the city and region's needs
- Be widely envied as a leader in innovation, environmental and climate change initiatives

Influence on the REDS strategic directions		**Agriculture and food product manufacturing**
		Visitor economy
	✔	**Employment and innovation corridor**
	✔	**Job ecosystem**
		Renewable energy and waste

04 Strategic context

Central Goldfields Shire Council Economic Development Strategy 2020-25
2020

Purpose	Aims to encourage economic growth in the Shire and outlines a clear economic focus for the key townships of Maryborough, Talbot, Cairsbrook and Dunolly
Identified priorities	• A productive, sustainable and creative shire • Invest in people and place • A thriving business community • Tailored economic development
Influence on the REDS strategic directions	✔ **Agriculture and food product manufacturing** **Visitor economy** ✔ **Employment and innovation corridor** ✔ **Job ecosystem** ✔ **Renewable energy and waste**

Central Goldfields Shire Council Tourism and Events Strategy 2020–25
2020

Purpose	Provides a clear vision and action plan for growing the Central Goldfields tourism industry
Identified priorities	• Shift the narrative around the Shire's identify and perception • Improve visitor experience, product and activation • Enhance and interpret the 'Gold Story' • Support and leverage the emerging arts and culture sector • Revitalise assets, infrastructure and accommodation • Develop and enhance events and festivals • Provide a contemporary approach to marketing and visitor services
Influence on the REDS strategic directions	**Agriculture and food product manufacturing** ✔ **Visitor economy** **Employment and innovation corridor** **Job ecosystem** **Renewable energy and waste**

Economic Development and Tourism Strategy
Loddon Shire 2019

Purpose	Provides direction to deliver infrastructure, attract investment, encourage local collaboration and position Loddon's town to maximise the economic impact for visitors
Identified priorities	• Balance population growth with local jobs growth • Increase the volume and value of tourist visitation • Cost-effectively resource economic development and tourism functions
Influence on the REDS strategic directions	**Agriculture and food product manufacturing**
	✔ **Visitor economy**
	Employment and innovation corridor
	✔ **Job ecosystem**
	Renewable energy and waste

Economic Development Strategy 2021–31
Macedon Ranges Shire Council 2021

Purpose	Provides a vision for economic development, job creation, education and training and COVID-19 recovery for the next 10 years
Identified priorities	• Leadership • Exceptional landscapes • Thriving townships • Enabling connections • Employment, education & training
Influence on the REDS strategic directions	✔ **Agriculture and food product manufacturing**
	✔ **Visitor economy**
	✔ **Employment and innovation corridor**
	✔ **Job ecosystem**
	Renewable energy and waste

Loddon Mallee Regional Organics Strategy
2019−25

Purpose	Vision for zero organics to landfill through improved management of organics
Identified priorities	• Reducing food waste • Maximising diversion of organics from households, businesses, organisation and institutions • Ensuring the region has access to organics reprocessing/recycling facilities • Ensure there are end markets for recycled products

Influence on the REDS strategic directions		
		Agriculture and food product manufacturing
		Visitor economy
		Employment and innovation corridor
		Job ecosystem
	✔	Renewable energy and waste

Loddon Mallee Waste and Resource Recovery Implementation Plan
2016−26

Purpose	Plan to address waste and recovery resources of Loddon Mallee
Identified priorities	• Educate community to reduce waste generation per capita • Enable beneficial use of organics • Increase reuse and resource recovery rates across region • Encourage and support innovation and research in order to develop new waste management solutions and markets

Influence on the REDS strategic directions		
		Agriculture and food product manufacturing
		Visitor economy
		Employment and innovation corridor
		Job ecosystem
	✔	Renewable energy and waste

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