Ovens Murray

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 respects to their Elders past, present and emerging.

We acknowledge that the Ovens Murray Regional Partnership region is on traditional lands, including those lands of the Taungurung, Yorta Yorta and Gunaikurnai 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 Manufacturing, Agriculture, Forestry and Fishing, Health Care and Social Assistance, Public Administration and Safety (Defence) and Retail sectors are all important drivers of economic growth and employment in the region.

- Manufacturing has historically been an important sector in the region particularly in Food Product Manufacturing and to a lesser degree Wood and Prefabricated Metal Product Manufacturing. The sector is still relatively concentrated in the region although its importance as an employer and contributor to GVA is declining as compared to the state average, likely due to broader structural adjustment and increases in service-based sectors.
- The region has a strong Public Administration and Safety sector which is a significant employer, led by the Defence subindustry.
- The Mining sector is experiencing rapid growth in employment as compared to the Victorian average. Mining is not a traditionally significant sector in the region, but its importance is growing.

Agriculture, Forestry and Fishing continues to be an important sector in the regional economy but growth in employment and GVA is slower than state averages. It is also projected that the industry will experience declines in employment in the future as the industry continues to transition into more capital intensive and less labour intensive.

- The sector's contribution to the region's GVA shrunk between 2015 to 2020, suggesting there may be considerable gains through innovation, improved productivity or value add throughout the agricultural supply chain.

Population driven sectors, including those associated with health and construction, are lagging state averages which is consistent with below average population growth in the region.

The region's access to freight routes and strong manufacturing and agriculture production means that it is well-placed to continue to grow exports. International export value from the region has steadily increased over the past decade from $656.3 million in 2010 to $907.4 million in 2020.

The region's Alpine National Park, its vibrant food and wine scene and unique attractions, cultural towns and ease of access from Melbourne, Sydney and Canberra supports the region's strong tourism sector, which had been growing year on year, but has been significantly impacted in the short term by the COVID pandemic.

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 Ovens Murray 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

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🟢 Green sectors are regional concentrations which are experiencing slower growth (or faster declines) than state averages

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

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⚪ Grey sectors are not regional concentrations and are experiencing slower growth (or faster declines) than state averages
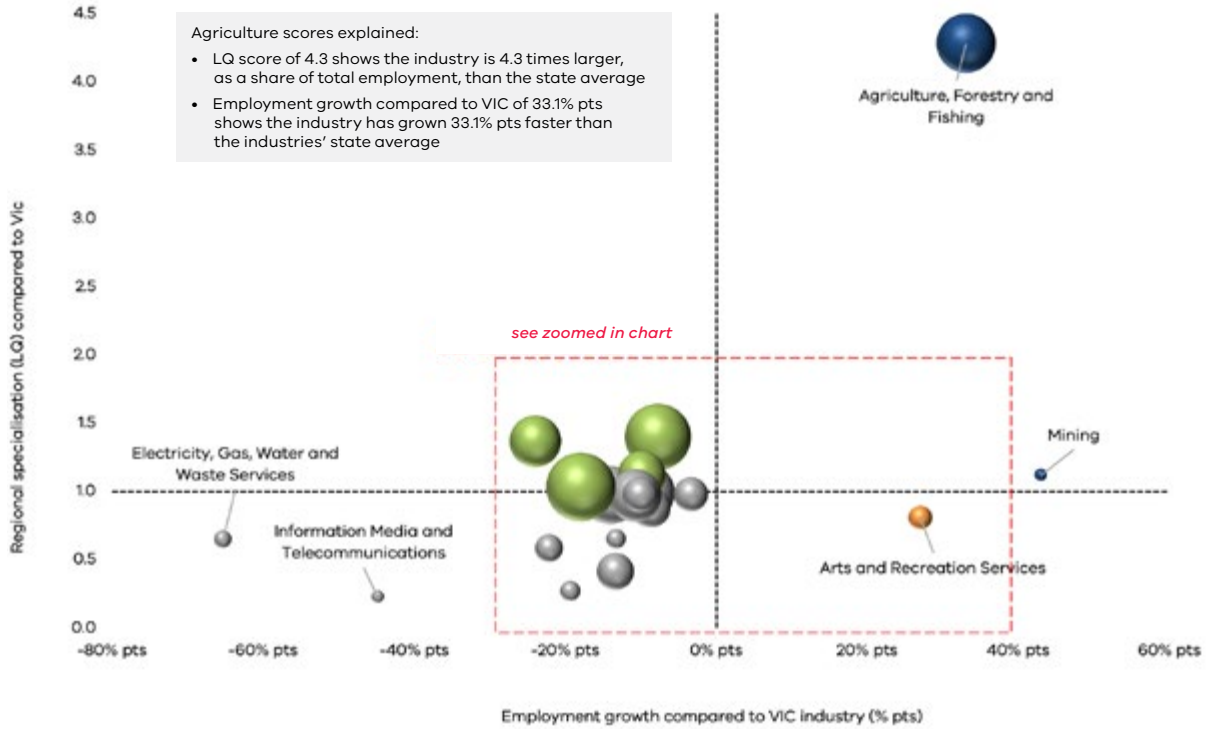

The position on the vertical axis indicates the industry's degree of employment specialisation (location quotient)[1] relative to the Victorian economy. For example, a value of 4.0 means that, as a share of total employment in the local economy, the industry employs four times as many people than the 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)

Agriculture scores explained:
- LQ score of 4.3 shows the industry is 4.3 times larger, as a share of total employment, than the state average
- Employment growth compared to VIC of 33.1% pts shows the industry has grown 33.1% pts faster than the industries' state average

see zoomed in chart

Size of bubble represents relative employment levels in 2020

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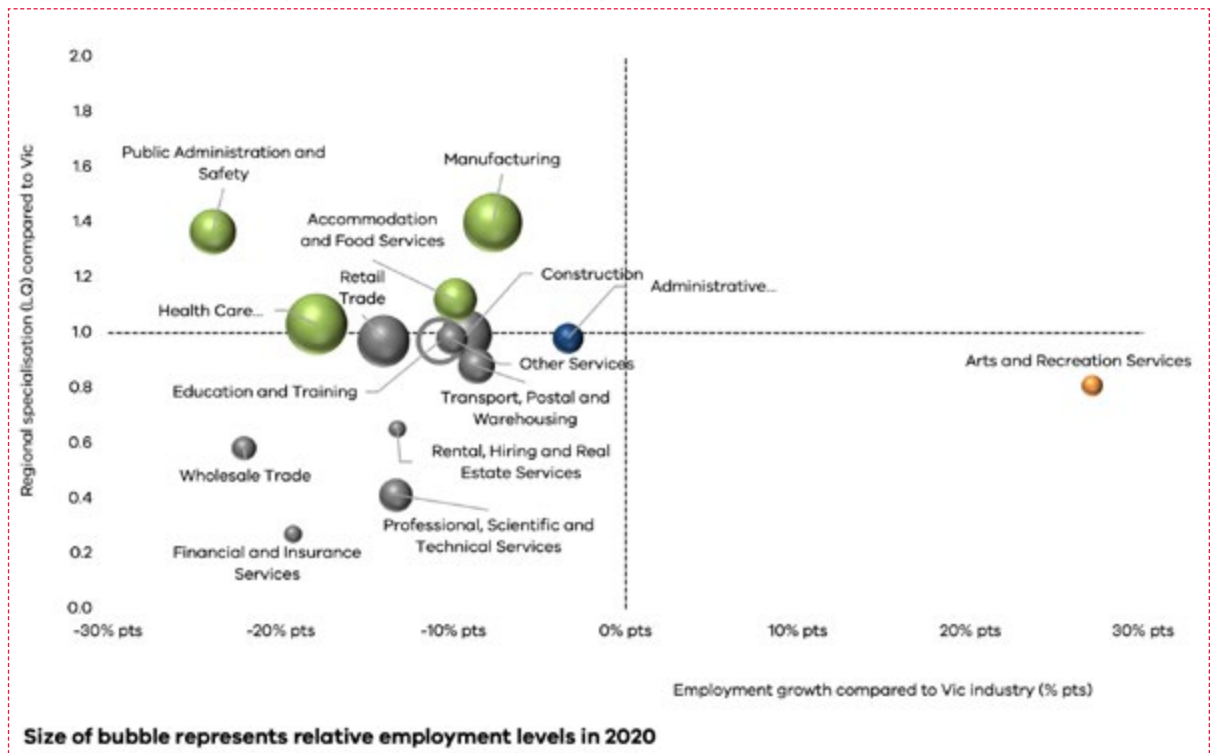
(NIEIR, 2020)
Note: For visibility of all sectors some bubbles have been represented as rings, the circumference of the circle is taken as size of the bubble.

As represented in Figure 1.1.1, the region is specialised in Agriculture, Forestry and Fishing; Manufacturing; and Public Administration and Safety (driven by Defence employment) which combined represent 30 per cent the region's employment.

Among subindustries, Defence, Agriculture, Forestry and Fishing Support Services, Wood Product Manufacturing, Agriculture, Beverage and Tobacco Product Manufacturing, Accommodation, Fabricated Metal Product Manufacturing, Non-Metallic Mineral Product Manufacturing, Primary Metal and Metal Product Manufacturing, Food Product Manufacturing, Pulp, Paper and Converted Paper Product Manufacturing, Machinery and Equipment Manufacturing, Residential Care Services, Heavy and Civil Engineering Construction, Preschool and School Education and Repair and Maintenance also recorded strong employment specialisation alongside.

Over the past five years, the region has seen employment growth outpace the state average in 3 (of 19) sectors; Agriculture Forestry and Fishing, Mining and Arts and Recreation Services. Among industries which lagged average employment growth for the state, two industries had a LQ score between 1.00 and 1.25 (Health Care and Social Services and Accommodation and Food Services). While these industries are slightly more concentrated than the state average, the difference is not sufficiently great to be defined as a regional specialisation.

When metropolitan Melbourne is excluded, and the region is compared with the rest of regional Victoria, the Ovens Murray demonstrates employment specialisations in Manufacturing, Transport, Postal and Warehousing, Administrative and Support Services and Public Administration and Safety. As governments and local leaders plan for the region's future economic direction, it is important to consider the Ovens Murray's position both within regional Victoria and the state.
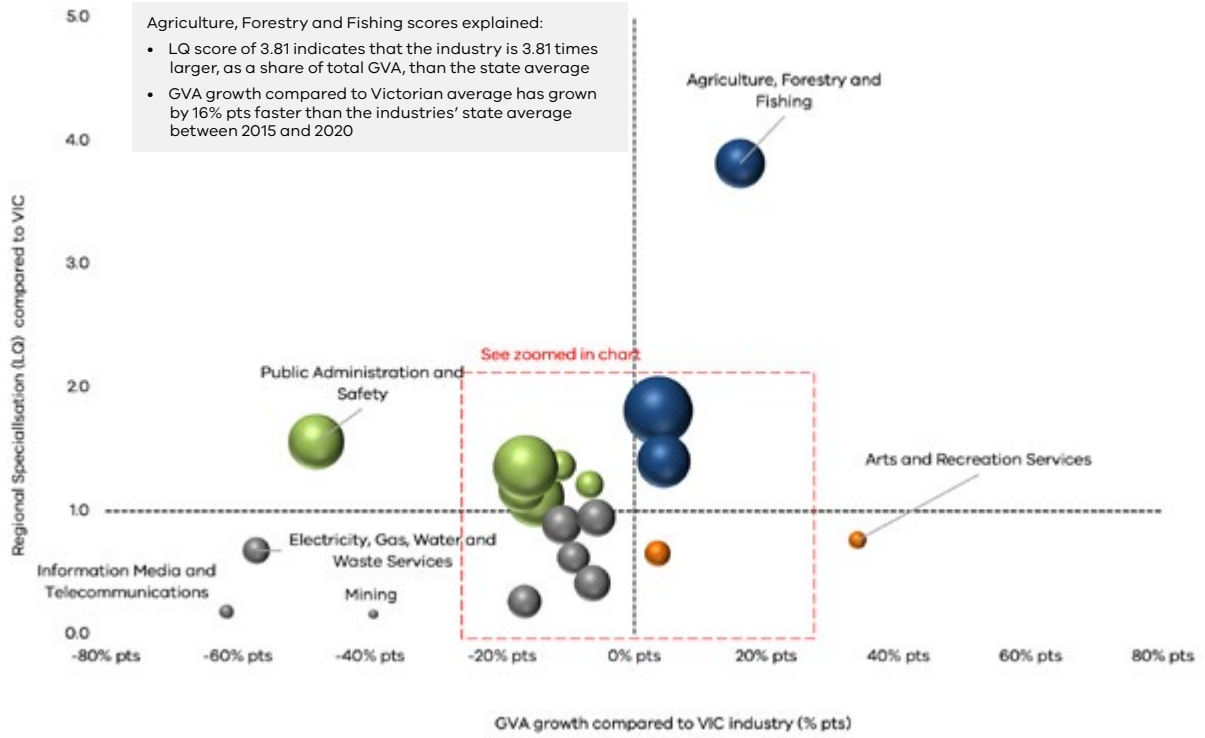
LQ analysis, GVA

Using the same approach as the employment LQ analyses above, one can get a better understanding of a region's specialisation of output by undertaking a LQ analysis using Gross value added (GVA). While the employment LQ results above captures the concentration of employments, it does not inherently capture the economic contribution of employment. By using GVA, the LQ analysis now provides insight into the contribution of each sector to economic outcomes.
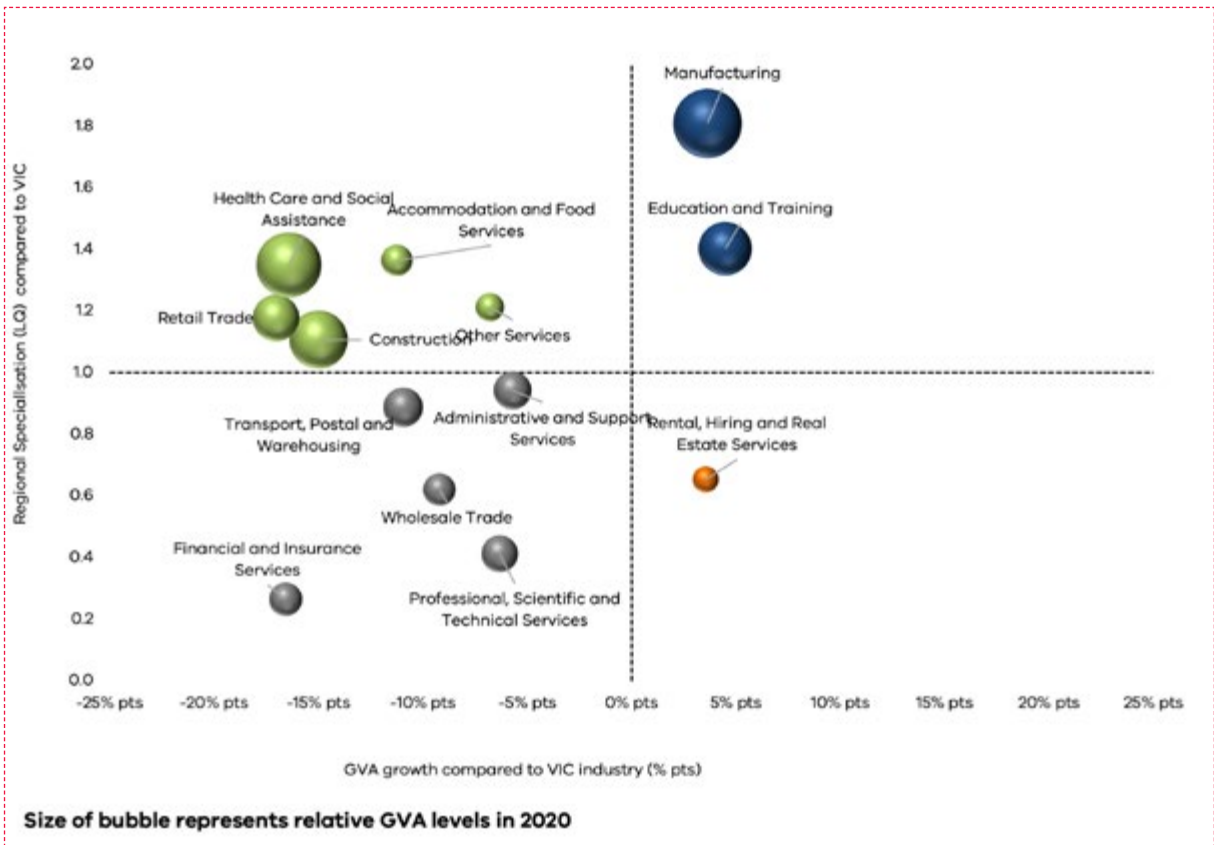
As shown in Figure 1.1.2, the region has recorded specialisation in Agriculture, Forestry and Fishing, Manufacturing, Accommodation and Food Services, Public Administration and Safety, Education and Training and Health Care and Social Assistance. Of these sectors, three recorded growth above standard industry growth in GVA over the past 5 years, Agriculture, Manufacturing and Education and Training.

When looking across sub-industries, the region was found to have specialisation within the sectors of Defence, Agriculture, Forestry and Fishing Support Services, Wood Product Manufacturing, Agriculture, Beverage and Tobacco Product Manufacturing, Food Product Manufacturing, Fabricated Metal Product Manufacturing, Non-Metallic Mineral Product Manufacturing, Pulp, Paper and Converted Paper Product Manufacturing, Accommodation, Preschool and School Education, Repair and Maintenance, Residential Care Services, Road Transport, Machinery and Equipment Manufacturing, Food Retailing, Medical and Other Health Care Services, Warehousing and Storage Services, Motor Vehicle and Motor Vehicle Parts Retailing, Hospitals and Heavy and Civil Engineering Construction.

Figure 1.1.2: Location Quotient (GVA)

Agriculture, Forestry and Fishing scores explained:
- LQ score of 3.81 indicates that the industry is 3.81 times larger, as a share of total GVA, than the state average
- GVA growth compared to Victorian average has grown by 16% pts faster than the industries' state average between 2015 and 2020

Size of bubble represents relative GVA levels in 2020

Size of bubble represents relative GVA levels in 2020
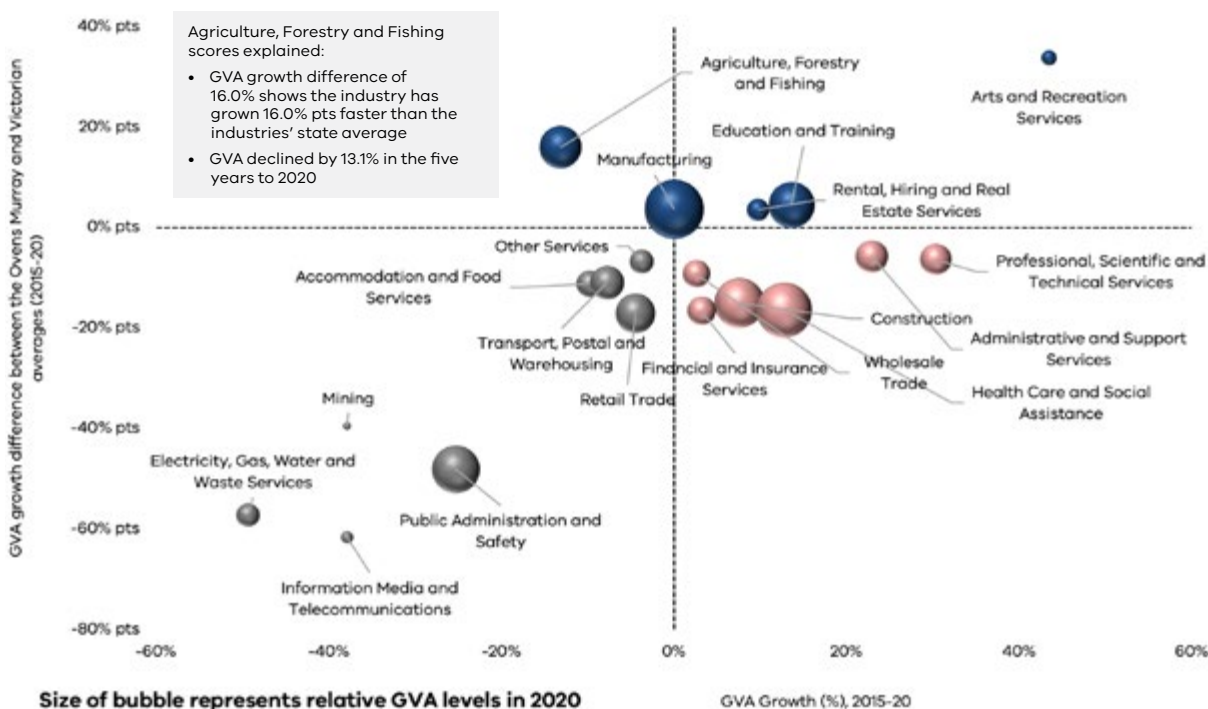
(NIEIR, 2020)

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

Agriculture, Forestry and Fishing scores explained:
- GVA growth difference of 16.0% shows the industry has grown 16.0% pts faster than the industries' state average
- GVA declined by 13.1% in the five years to 2020

Size of bubble represents relative GVA levels in 2020

GVA Growth (%), 2015-20

(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, five (of 19) industries outperformed the average growth across the state, led by Arts and Recreation (+43.4% pts). Furthermore, 9 sectors saw overall GVA growth between 2015 and 2020.

The region exhibits further strengths among its subindustries.

Over the past five years, Preschool and School Education; Agriculture, Defence; Fabricated Metal Product Manufacturing; Non-Metallic Mineral Product Manufacturing, Machinery and Equipment Manufacturing; Building Cleaning, Pest Control and Other Support Services; Agriculture, Forestry and Fishing Support Services and Pulp, Paper and Converted Paper Product Manufacturing; all outperformed the state's average growth rate.

Strong results across a diverse range of sectors indicates the comparative strength of the Ovens Murray 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

Table 1.1.4: Industry Cluster Analysis

Sector	LQ (Employment)	LQ (Business count[5])	Clusters
Agriculture, Forestry and Fishing	3.81	4.6	✔
Mining	0.16	2.1	?
Manufacturing	1.81	1.2	?
Electricity, Gas, Water and Waste Services	0.68	1.9	?
Construction	1.11	1.0	✕
Wholesale Trade	0.62	0.5	✕
Retail Trade	1.18	0.9	✕
Accommodation and Food Services	1.37	1.3	✔
Transport, Postal and Warehousing	0.89	0.5	✕
Information Media and Telecommunications	0.18	0.4	✕
Financial and Insurance Services	0.26	0.6	✕
Rental, Hiring and Real Estate Services	0.65	0.8	✕
Professional, Scientific and Technical Services	0.41	0.6	✕
Administrative and Support Services	0.94	0.7	✕
Public Administration and Safety	1.56	0.9	?
Education and Training	1.40	0.7	?
Health Care and Social Assistance	1.35	0.7	?
Arts and Recreation Services	0.76	0.9	✕
Other Services	1.21	1.2	✕

(ABS, 2021) (NIEIR, 2020)

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

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

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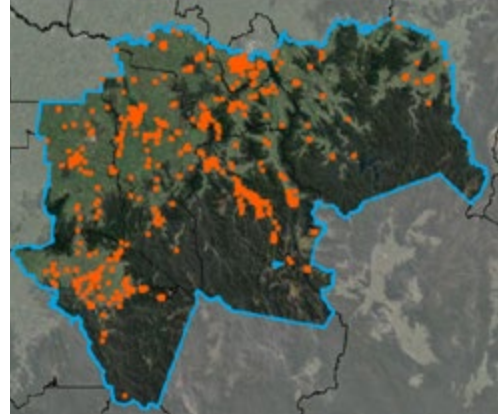
5. Business count sourced from REMPLAN and includes all active GST trading businesses with the exception of family trusts and self-managed superannuation funds

Figure 1.1.5: Cluster mapping

Agriculture businesses


Accommodation and Food Businesses

(REMPLAN, 2021)

Gross Value Add

The Ovens Murray's Gross Value Add (GVA) has experienced growth since the turn of the century, with the region's total GVA rising from $4.5b to $5.5b between FY2001 and FY2018 (see Figure 1.1.6). Since FY2018, the region has experienced a small contraction in GVA, likely driven by compounding impacts of dry conditions, bushfires and the COVID pandemic. Trends vary across LGAs, Wodonga City is the largest contributor to GVA in the region. Alongside Wangaratta and Benalla, Wodonga experienced growth in GVA between FY2001 and FY2018, before declining until FY2020. Towong and Mansfield are the region's smallest contributors to GVA and have experienced steady growth since FY2001. Alpine has contracted over the past two decades while Indigo has remained stable.

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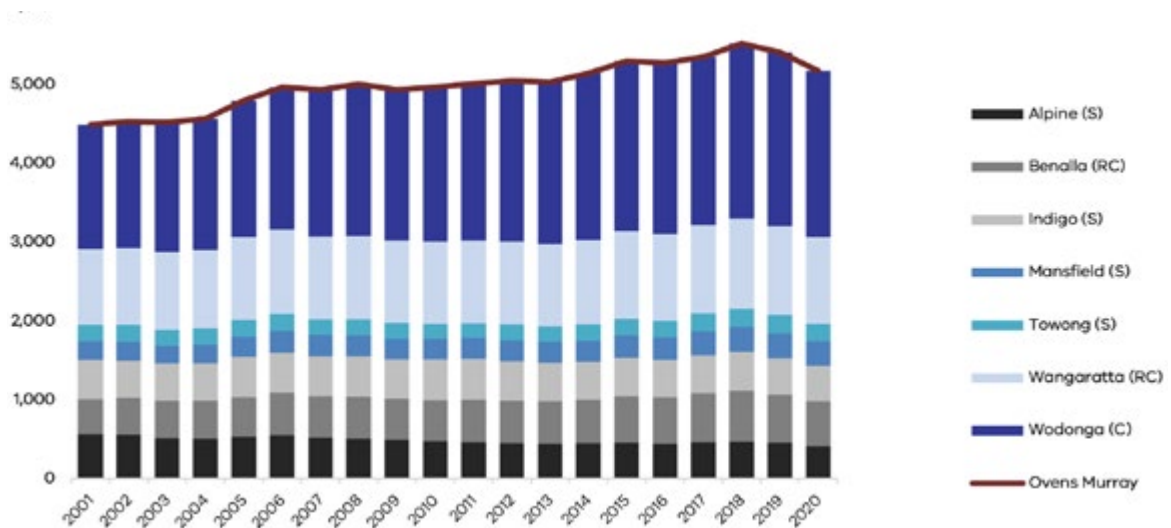
(NIEIR, 2020)

The industry composition in the region has changed over time. As at FY2020, Manufacturing, Health Care and Social Assistance and Construction were the three leading industries. Since the turn of the century, Manufacturing has consistently been the largest contributor to economic output. However, during this time, Health Care and Social Assistance has steadily increased in importance, surpassing the Construction, Public Administration and Safety and Agriculture, Forestry and Fishing sectors .

Figure 1.1.7: GVA by industry over time, Ovens Murray
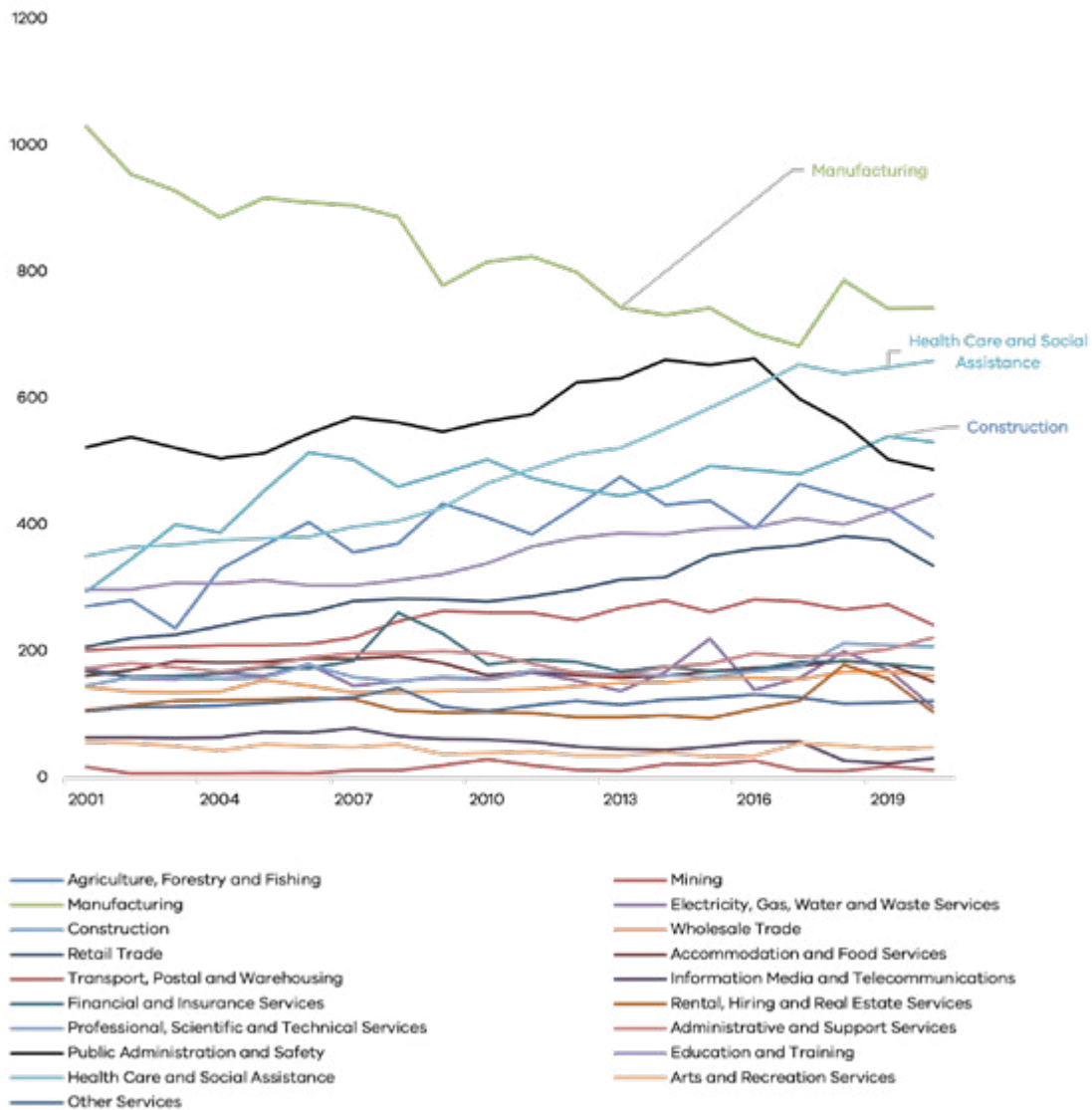
(NIEIR, 2020)

A steep decline in Beverage and Tobacco Product Manufacturing between 2000-2010, in line with trends seen across the state, has largely contributed to the decline in the Manufacturing GVA between 2001 and 2018. This decline was partially offset by an increase in food, fabricated metal, and wood product manufacturing. Since FY2007 Food Product Manufacturing has been the largest contributor the GVA in the Manufacturing industry.

Figure 1.1.8: GVA by Manufacturing sub-industry over time
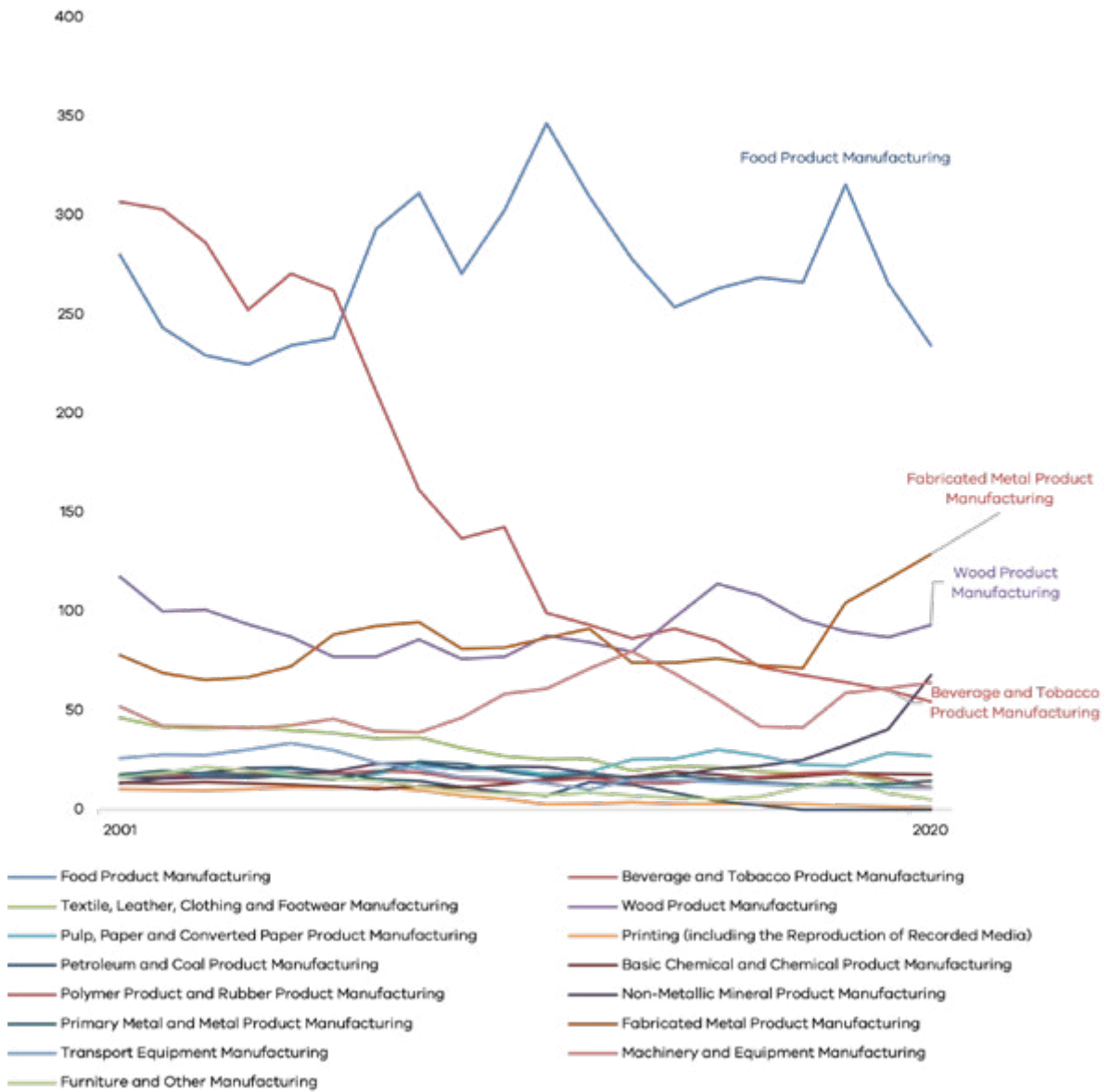
(NIEIR, 2020)

Consistent with the rest of the state, and partially explained by demographic shifts thanks to a growing and ageing population, the Health Care and Social Assistance subindustries have seen GVA growth over the past two decades. Gains have been driven by Social Assistance Services, Hospitals, and until FY2017, Medical And Other Health Care Services (see Figure 1.1.9).

Figure 1.1.9: GVA by Healthcare sub-industry over time, Ovens Murray
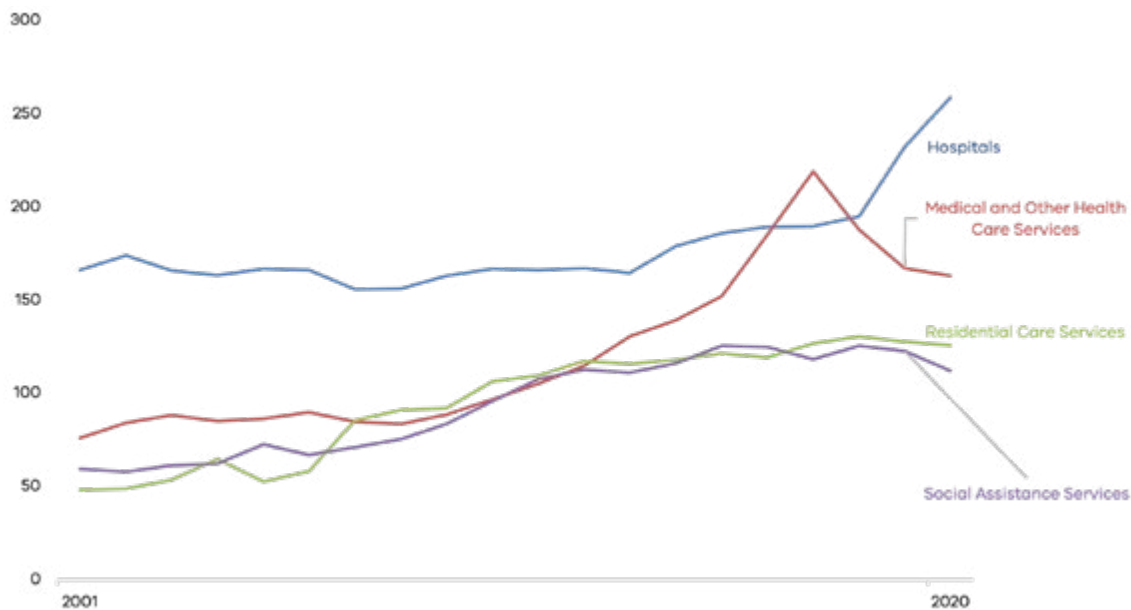
(NIEIR, 2020)

Construction Services and Building Construction are the largest contributors to the Construction sector's GVA, while Heavy And Civil Engineering Construction has realised a GVA growth between FY2014-2018, it has declined in recent years (see Figure 1.1.10).

Figure 1.1.10: GVA by Construction sub-industry over time, Ovens Murray
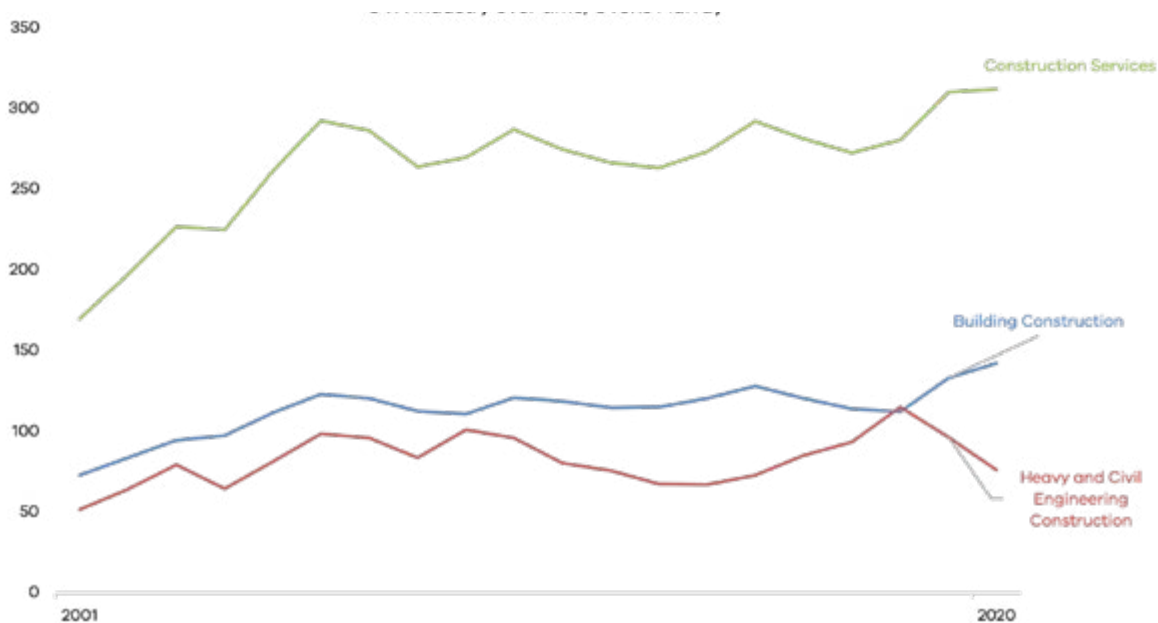
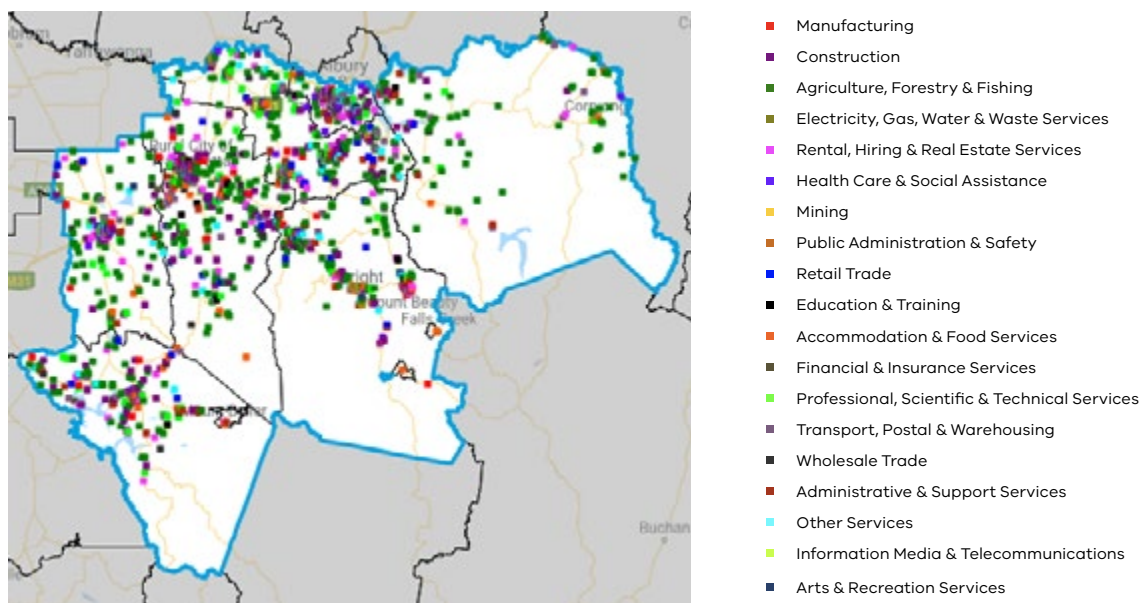(NIEIR, 2020)

Business growth

Over the past five years, over 2,900 new businesses have established themselves in the Ovens Murray region, mostly concentrated around Wodonga and Wangaratta. By industry, the highest proportion were in Construction (nearly 20 per cent or 575 businesses) and in the Agriculture, Forestry and Fishing (17 per cent or 516 businesses). At a subindustry level, 47 per cent (or 268) of new Construction businesses were in House Construction, Plumbing Services, Electrical Services and Carpentry Services, and over 54 per cent (or 283) of the new agricultural businesses were in the Sheep and Beef Cattle Farming.

Other industries of significant business growth are:

- Professional, Scientific and Technical Services (278 new businesses),
- Rental, Hiring and Real Estate Services (194 new businesses),
- Accommodation and Food Services (192 new businesses), and
- Transport, Postal and Warehousing (192 new businesses).

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

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

Legend:
- Manufacturing
- Construction
- Agriculture, Forestry & Fishing
- Electricity, Gas, Water & Waste Services
- Rental, Hiring & Real Estate Services
- Health Care & Social Assistance
- Mining
- Public Administration & Safety
- Retail Trade
- Education & Training
- Accommodation & Food Services
- Financial & Insurance Services
- Professional, Scientific & Technical Services
- Transport, Postal & Warehousing
- Wholesale Trade
- Administrative & Support Services
- Other Services
- Information Media & Telecommunications
- Arts & Recreation Services

Source: (REMPLAN, 2021)

International Exports[6]

Located between Sydney and Melbourne, the region is well serviced by the Hume Freeway/Highway. The dual carriageway is a key piece of freight infrastructure which enables producers to efficiently access ports in Melbourne, Wollongong, and Sydney and therefore, international markets. International export value from the region has steadily increased over the past decade from $656.3 million in 2010 to $907.4 million in 2020.

Manufacturing products are the primary contributor to growth, worth $450.7 million in value in 2020 (see Figure 1.1.13). Food Product Manufacturing has driven the industry over the past decade, reaching $246.9 million in subindustry total export value in 2020. The region is an important food processing location with centres in Wodonga, Wangaratta, Wahgunyah and Benalla. Activities are focussed on processing beer and wine, grain mill and cereal products, and dairy products. Beyond food, in 2020 the region also exported $56.0 million in Primary Metal and Metal Product Manufacturing Product, and $31.0 in Machinery and Equipment Manufacturing Product.

Worth $210.2 million in value in 2020, the second most significant exporting industry is Agriculture, Forestry and Fishing. Beef is the region's most valuable agricultural export, followed by dairy, sheep and wool. The United States leads China and Japan as Victoria's most significant beef and sheep markets. Meanwhile, led by Japan, China and Indonesia, Asian markets account for over 80 per cent of Victoria's dairy exports and wool heads to China, Italy and India. Agricultural export value has declined since 2019 due largely to the impact of COVID-19 and China's imposition of trade restrictions on key Australian commodities and associated challenges re-listing abattoirs following a COVID-19 induced pause on trade.

The two major sectors together comprised 72.8 per cent of total export value in 2020. Other smaller but relatively significant sectors are Accommodation and Food Services (worth $68.7 million in export value in 2020), Education and Training (worth $41.1 million) and Wholesale Trade (worth $37.2 million).

**Figure 1.1.12:** International Export Value, Key Industries
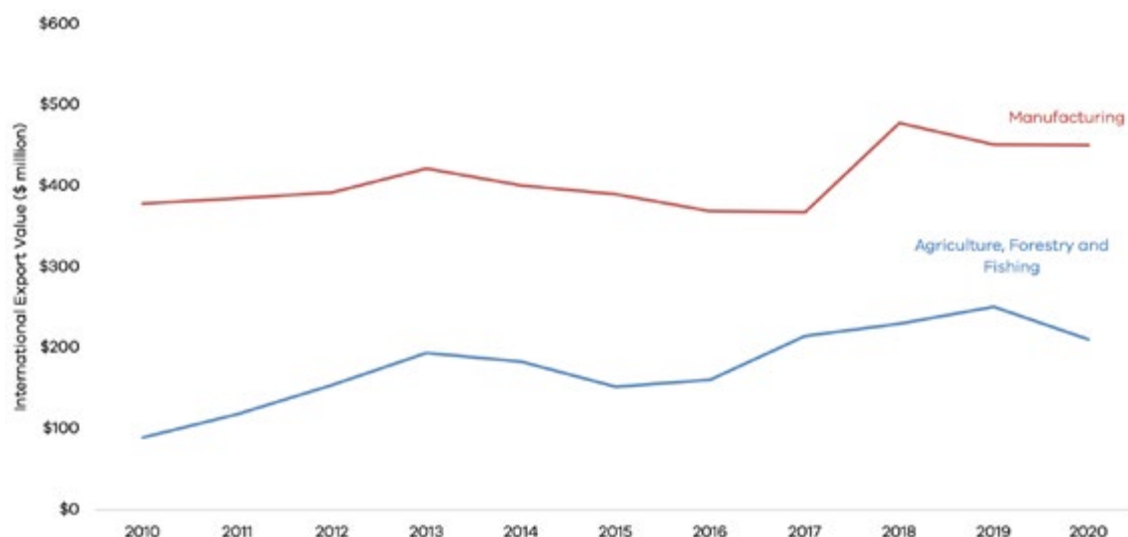
Sources: (NIEIR, 2020)

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

Visitor Economy

The region's Alpine National Park, its vibrant food and wine scene and unique attractions such as Ned Kelly Alive make tourism a significant contributor to the regional economy, particularly for Alpine and Mansfield Shires. Prior to COVID-19, visitor numbers and expenditure were growing year-on-year (see Figure 1.1.13). Domestic daytrips visitors have been the most common category of visitation, followed by domestic intrastate overnight visitors. However, restrictions associated with COVID-19 including international and state border closures, stay-at-home orders and density limits have significantly impacted the region's visitor economy. The total number of domestic daytrip, and domestic and international overnight visitors have fallen from 4.0 million in 2019 to 2.1 million in 2020. This decline led to a fall in total visitor expenditure; from $1.0 billion in 2019 to $547 million in 2020. Despite the easing of restrictions and vaccine rollout, the pandemic is likely to have lasting effects on visitation patterns to the region.

Figure 1.1.13: Visitation Overview (2015–2020)[7]
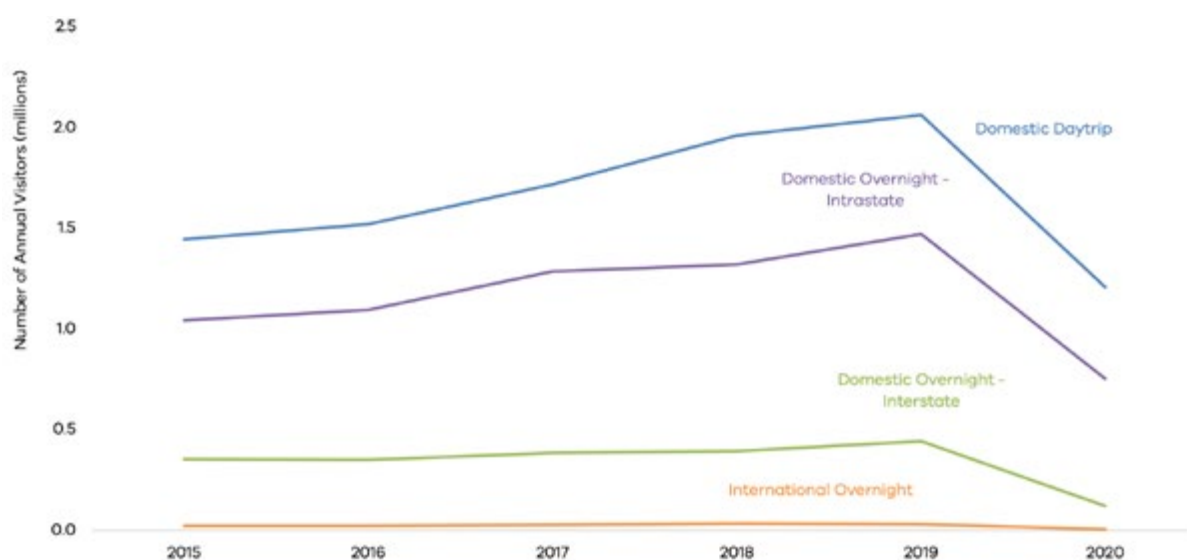
Source: (Tourism Research Australia, 2021a)

The number of international and domestic interstate overnight visitors has fallen by 77.5 per cent and 72.7 per cent respectively, significantly more than the declines in domestic day-trippers (41.4 per cent) and domestic intrastate overnight visitors (48.8 per cent). At 11.0 per cent of total visitation in 2019 the region receives significantly more domestic interstate overnight visitors as a proportion of total visitation than most regions. This is explained in part by the region's location on the Victorian – New South Wales border. As such, the pandemic's impact on the region has been higher than much of the rest of regional Victoria, due to repeated 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. To a certain extent, the region is already realising these benefits; average visitor spend is higher in 2020 than 2019 among domestic daytrip and domestic intrastate overnight tourists, in part due to longer stays. Since the region shares a border with New South Wales, 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 1.1.14: Visitation & Average Spend (2019–2020)[8]

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
Domestic Daytrip	2,063,000	1,209,000	$95	$115
Domestic Intrastate Overnight	1,474,000	754,000	$410	$482
Domestic Interstate Overnight	443,000	121,000	$475	$359
International Overnight	30,000	7,000	$659	$178

Source: (Tourism Research Australia, 2021a)

Most businesses which service visitors are small enterprises. In 2019, there was 1,593 tourism businesses across the region. Of these, 74.8 per cent have four employees or fewer, with 39.5 per cent sole proprietors. Just 3.9 per cent of businesses have 20 or more employees

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

Local Government Area	Tourism Businesses
Alpine	275
Benalla	172
Indigo	226
Mansfield	179
Towong	71
Wangaratta	347
Wodonga	323
Total	**1,593**

Source (Tourism Research Australia, 2020)

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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, Ovens Murray has experienced steady population growth, albeit at a slower rate than the regional Victorian average. Notwithstanding the impacts of COVID-19, this trend is expected to continue.

- Regional growth has been driven by Wodonga and, to a lesser extent, by Wangaratta. This trend reflects the growing liveability appeal of regional cities for those seeking to move away from metropolitan Melbourne.
- All municipalities excluding Towong have experienced population growth and are projected to continue to grow.
- Between 2019 and 2020, population growth in smaller LGAs was driven by net inflows of people from within Australia. In contrast, Wodonga mostly gained from have been from births and Wangaratta from overseas migrants.
- The enduring nature of population changes due to COVID-19 are yet to be determined and as such, the impact on economic activity yet to be fully understood.

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

- This movement is consistent with trends across regional Victoria and is likely to reflect lower access to employment, training, and education pathways.
- While 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, the region has one of the oldest age profiles in regional Victoria.
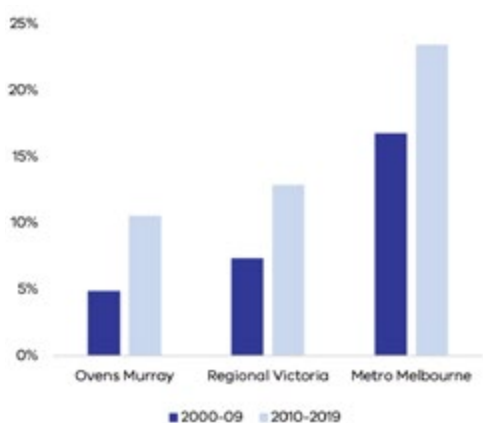
Population and population growth

In 2020, Ovens Murray was home to an estimated resident population of 131,430. 42,662 (32 per cent) of these were in the City of Wodonga, 29,197 (22 per cent) in the Rural City of Wangaratta, 16,885 (13 per cent) in Indigo Shire, 14,137 (11 per cent) in Benalla Rural City, 12,973 (10 per cent) in Alpine Shire, 9,474 (7 per cent) in Mansfield Shine and 6,102 (5 per cent) in Towong Shire.

Ovens Murray's population increased by 4.7 per cent between 2001 and 2010 and by 11.1 per cent between 2011 and 2020. These rates underperform averages across regional Victoria and metropolitan Melbourne (see Figure 1.2.1).

The region's population was forecast to continue to grow, albeit at a more subdued rate than regional average, 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 sustained strong growth in Wodonga, while Wangaratta and Mansfield shires have also experienced notable growth (see Figure 1.2.3).

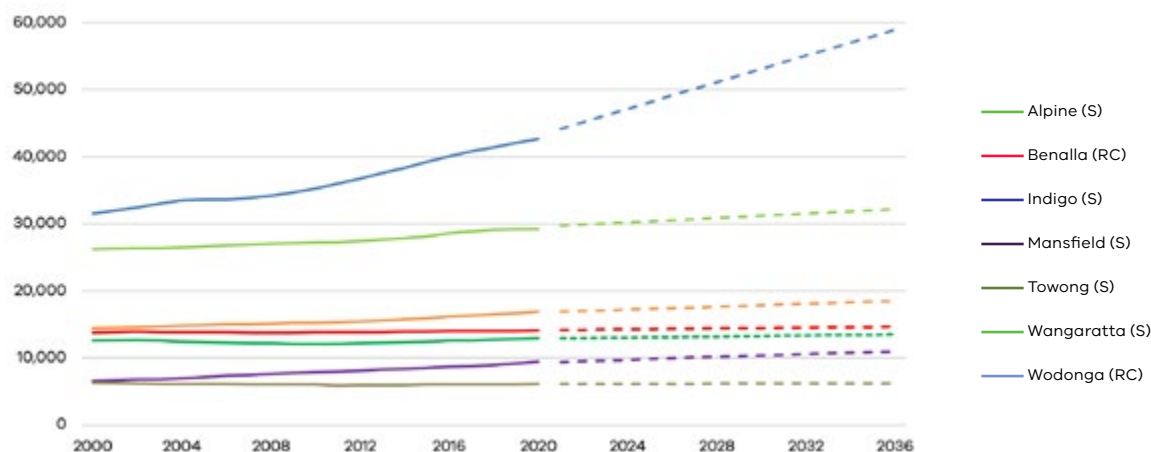**Figure 1.2.1:** Population Growth

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

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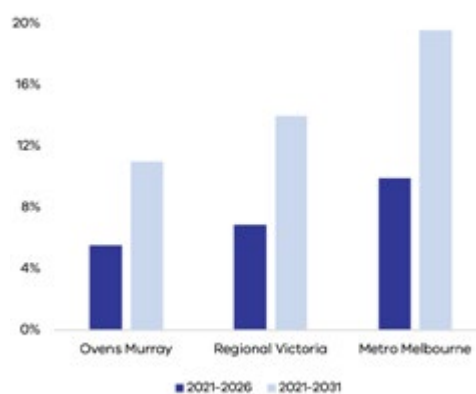
Source: (Department of Environment, Land, Water and Planning (DELWP), 2019)

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


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

Components of population change

Between 2019 and 2020, population change in Ovens Murray was realised via positive net internal migration (NIM), natural increases and net overseas migration (NOM) (see Figure 1.2.4). Overall, the region gained over 1,200 residents, 550 of which were added to Wodonga, predominantly through natural increase (more births than deaths) but also strong domestic and international migration.

The region's second largest population centre, Wangaratta, experienced net internal migration out of the city however its population grew thanks to overseas migration and natural increases. Meanwhile, the smaller LGAs of Mansfield, Indigo, Towong and Benalla relied on domestic migration to drive population growth.

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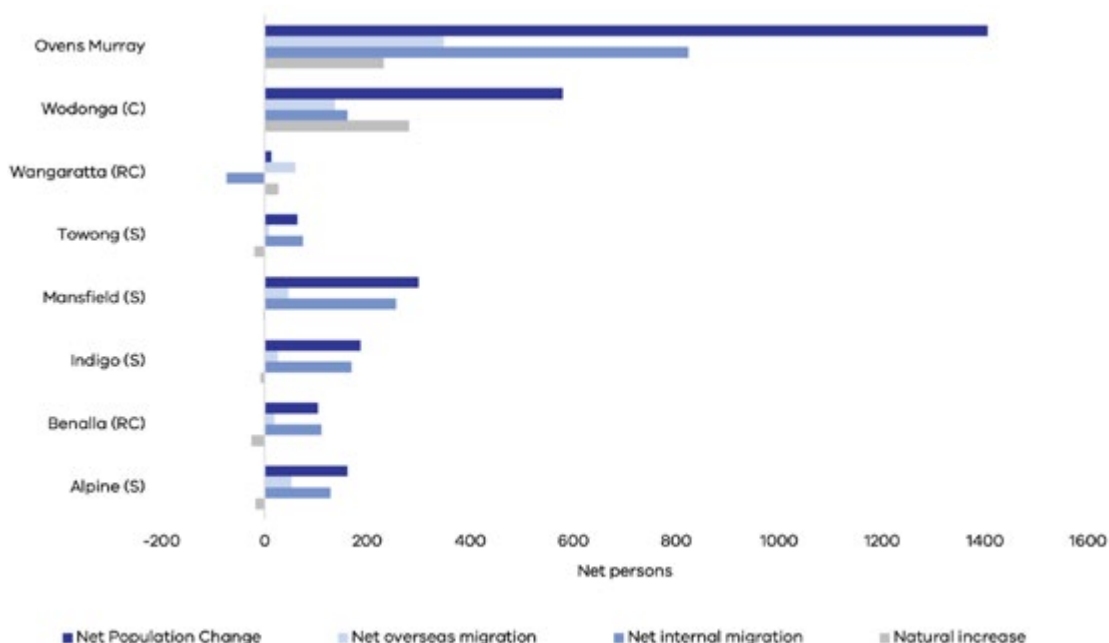
Source: (ABS, 2021)

Regional internal migration

While all LGAs recorded positive population growth over the 2019-2020 period, a breakdown of net internal migration by age indicates a significant outflow of those aged 15 to 24 years from the region (see Figure 1.2.5). Although higher than average, this outflow is consistent with regional Victorian trends and may reflect local access to a variety of education and employment opportunities. However, impacts on the working age population are mitigated due to inflows among those in the 25 to 44 years and 45 to 64 years age cohorts. Particularly strong for Mansfield, this immigration suggests the region is an attractive place to start a family and or progress a career.

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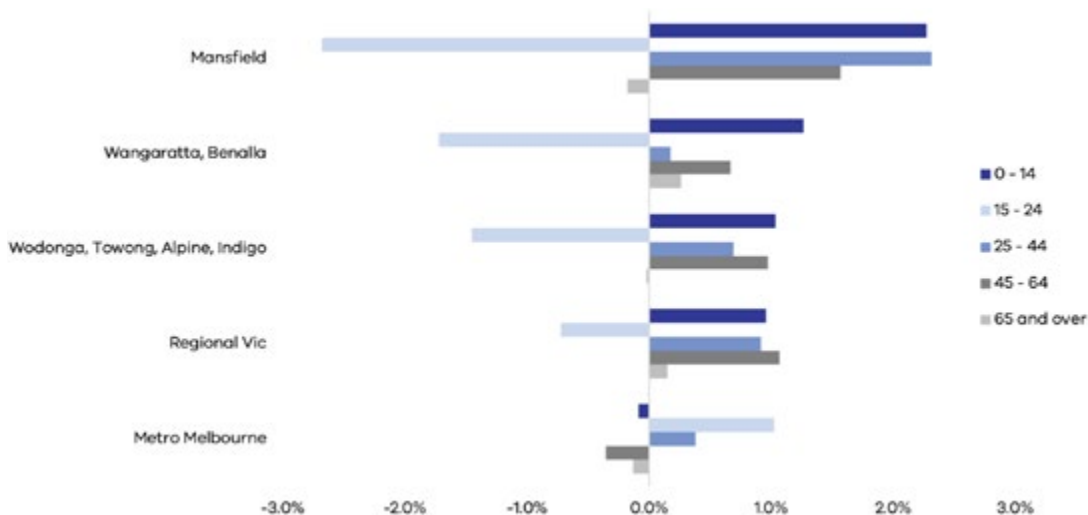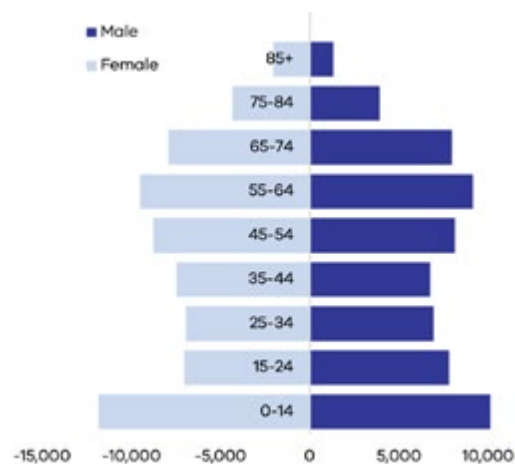

Source: (ABS, 2020b)

Note: data indicates average migration as a proportion of 2016 population by age group. Data refers to domestic / internal migration in Australia. Note: the ABS time series of internal migration is broken at 2016 to align with new statistical regions. 2016-18 insights are consistent with the movements represented in previous statistical regions where alignment is possible.

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

Population cohort analysis

Ovens Murray's population is 50.6 per cent female and 49.4 per cent male. With a median age of 44 years, the population of Ovens Murray is older than that of regional Victoria (42 years) and significantly older than metropolitan Melbourne (36 years). The working aged population (15 to 64 years) comprises 60.4 per cent of the population, while 21.1 per cent of the population are 65 years or older.

Figure 1.2.6: Population by Age

Source: (ABS, 2020c)

1.6 per cent of the region's population are Aboriginal and Torres Strait Islander, while 6.1 per cent live with a disability. These proportions are consistent with regional averages however exceed those in metropolitan Melbourne. Ovens Murray has a relatively low proportion of culturally and linguistically diverse (CALD) residents; only 5.1 per cent of the population speaking a language other than English at home, 0.6 per cent of people who speak a second language with low to no proficiency in English, and 10.3 per cent are born overseas. All these measures of the CALD population are slightly lower than regional Victorian averages, and significantly lower than metropolitan Melbourne averages (Figure 1.2.7).

Figure 1.2.7: Population Cohorts
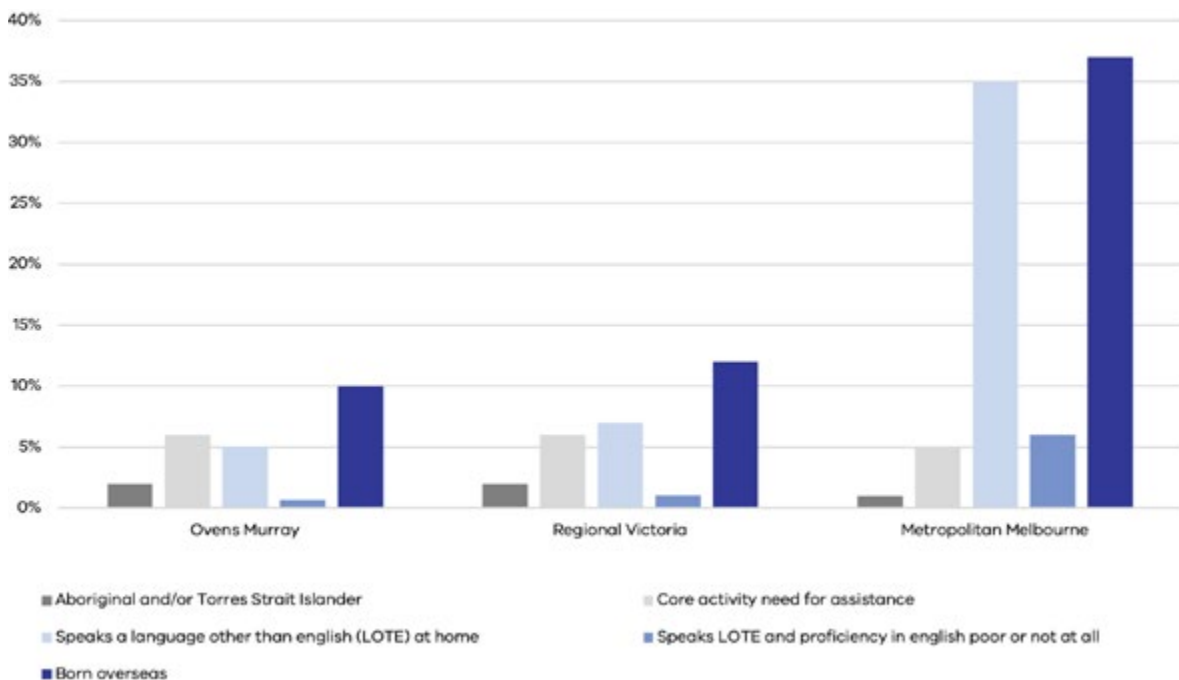
Source: (ABS, 2016a)

1.3
Socio-Economic Profile

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

- As it relates to household incomes, socio-economic disadvantage and educational attainment, Ovens Murray tends to align with regional Victorian averages.
- Indigo tends to perform well across socioeconomic measures while Benalla tends to perform poorly relative to averages across the rest of the region and rest of regional Victoria.
- Relative to the general population rates across the region, 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

Ovens Murray exhibits similar household incomes to averages across regional Victoria; in both cases 32 per cent of households earn over $1,000 per week and for Ovens Murray 43 per cent of households earn below $650 a week, a slightly smaller share than the regional Victoria (45 per cent). At both upper- and lower-income bounds, the region exhibits lower household incomes than metropolitan Melbourne where 46 per cent households earn over $1,000 per week and 34 per cent earn less than $650.

At an LGA level, households in Indigo Shire and the City of Wodonga tend to have higher average incomes, while Benalla, Alpine and Towong tend to have lower (see Figure 1.3.1).

Figure 1.3.1: Household Income Distribution (Weekly)
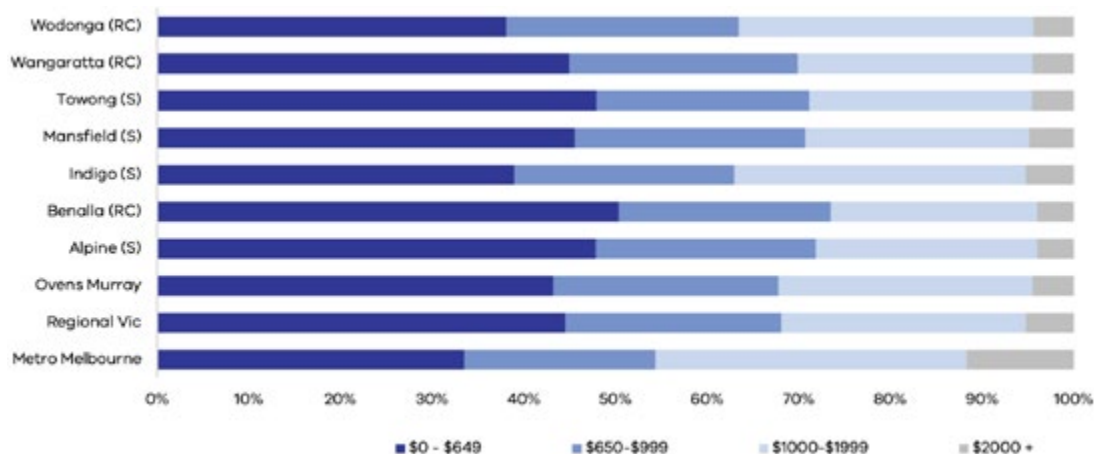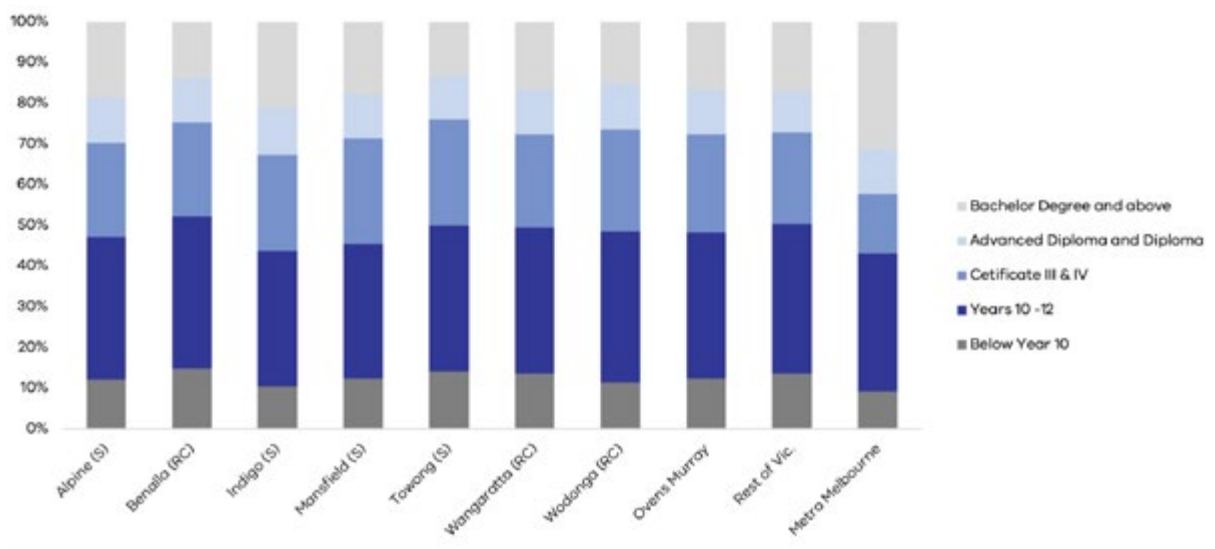

Source: (ABS, 2016b)

Education attainment

Broadly speaking, levels of educational attainment in Ovens Murray are consistent with regional averages however there are substantial variations across LGAs (see Figure 1.3.2).

Approximately the same proportion of residents have a bachelor's degree or higher qualification (17 per cent for both Ovens Murray and regional Victoria) and achieve diplomas (11 per cent in the case of Ovens Murray, 10 per cent for regional Victoria), while slightly more have a Certificate III or IV (24 per cent in Ovens Murray, 22 per cent for regional Victoria). While the proportion of those with a certificate exceeds the rate in metropolitan Melbourne (15 per cent), far more Melburnians have a bachelor's degree or higher qualification (31 per cent). Education levels in the region are likely to reflect the qualification levels required for many of the major employing industries in the region, namely Agriculture, Manufacturing and Construction.

At an LGA level, Indigo, Mansfield and Alpine Shires have larger proportion of residents with a bachelor's degree or higher, and a higher proportion of residents who have progressed beyond secondary school education. Meanwhile, Benalla and Towong LGAs have a lower proportion of residents progressing beyond secondary school (48 per cent and 50 per cent respectively). Those who do progress beyond secondary school are more likely to have a certificate (23 per cent and 26 per cent) than more advanced qualifications.
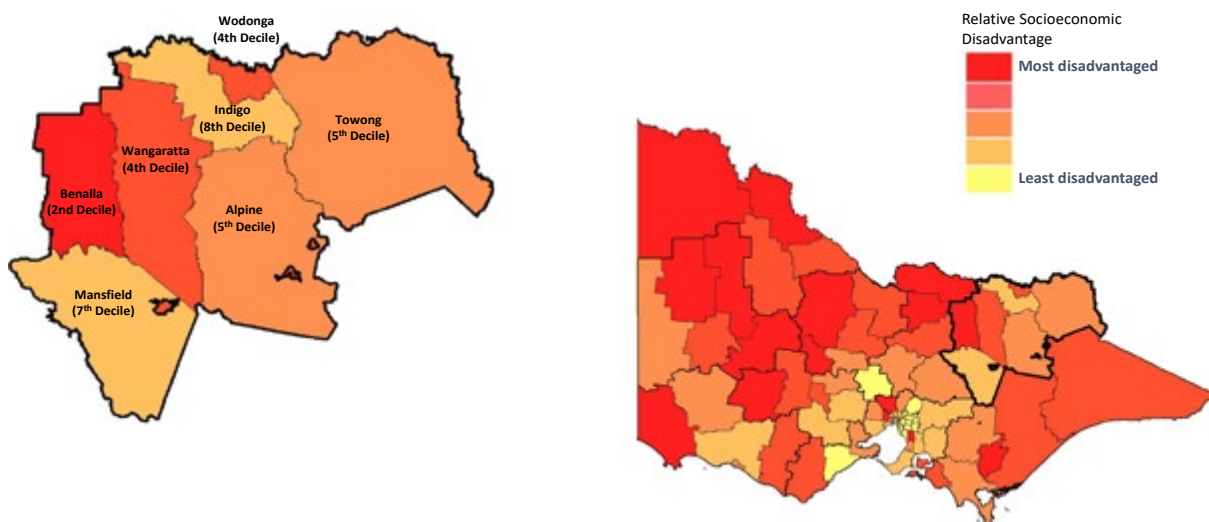
Figure 1.3.2: Educational Attainment (Highest Level)

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 Ovens Murray; while Indigo and Mansfield are amongst the least disadvantaged LGAs in regional Victoria, Benalla is amongst the most. Meanwhile, Alpine, Towong, Wodonga and Wangaratta rank just below the state median.

Between 2011 and 2016, all LGAs, excluding Benalla and Towong realised improvements in relative levels of disadvantaged. Towong marginally deteriorated while Benalla 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)	2011 Decile	
Alpine (S)	39	5	35	5	▼
Benalla (RC)	16	2	16	2	=
Indigo (S)	57	8	53	7	▼
Mansfield (S)	56	7	54	7	▼
Towong (S)	38	5	42	6	▲
Wangaratta (RC)	32	4	30	4	▼
Wodonga (RC)	27	4	26	4	▼

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:
- Taungurung People (orange)
- Yorta Yorta People (dark red)
- Gunaikurnai People (yellow)

(First Peoples State Relations, June 2021)

Aboriginal and Torres Strait Islanders[9]

Table 1.3.6 (below) indicates a range of measures comparing socio-economic outcomes for the 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 Ovens Murray region, Aboriginal and Torres Strait Islanders are almost 3 times more likely to be unemployed, with a 14.0 per cent unemployment rate. The labour force participation rate for Aboriginal and Torres Strait Islanders (55.5 per cent) is almost 7 percentage points lower than the average rate across the local population. Aboriginal and Torres Strait Islander households are more likely to earn less than $650 per week (56.8 per cent of homes) than average (42.5 per cent of homes).

Furthermore, 18.9 per cent Aboriginal and Torres Strait Islander young people in the region are not engaged in work or study. This is significantly higher than the average rate of 9.5 per cent.

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

Table 1.3.6: Aboriginal and Torres Strait Islander Analysis

Category	Measure	Victoria	Regional Victoria	Metro Melbourne	Ovens Murray
Economic performance	Labour force participation rate (%)	**64.5%** ■	**60.9%** ■	**65.8%** ■	**62.4%** ■
	Aboriginal and Torres Strait Islander Victorians	*57.8%* ■	*52.8%* ■	*62.4%* ■	*55.5%* ■
	Unemployment rate (%)	**6.6%** ▲	**5.9%** ▲	**6.8%** ▲	**4.9%** ■
	Aboriginal and Torres Strait Islander Victorians	*13.9%* ■	*16.5%* ■	*11.8%* ■	*14.0%* ▼
Disadvantage and shared prosperity	Households earning less than $650 per week (2016 dollars) (%)	**34.8%** ▼	**43.1%** ▼	**31.8%** ▼	42.5% ▼
	Aboriginal and Torres Strait Islander households	*47.7%* ▼	*56.6%* ▼	*39.2%* ▼	*56.8%* ▼
	Children in jobless households (%)	**16.4%** ■	**16.5%** ■	**16.3%** ■	**15.3%** ■
	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%** ▲	**29.0%** ■
	Aboriginal and Torres Strait Islander Victorians	*19.9%* ▲	*19.5%* ▲	*20.3%* ▲	*22.4%* ▼
Skills and education	People aged 15–24 not engaged in work or study (%)	**8.6%** *	**11.3%** *	**7.9%** *	**9.5%** *
	Aboriginal and Torres Strait Islander Victorians	*21.7%* *	*25.0%* *	*18.6%* *	*18.9%* *

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

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

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

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

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

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

(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

The region is likely to have latent labour capacity, despite a comparatively low unemployment rate.

- Growth opportunities may exist by addressing the comparatively high proportion of part-time workers and comparatively low participation rate (especially for female workers).

The workforce is relatively diversified with the seven top employment industries employing 70 per cent of the workforce. This is consistent with the findings of the Location Quotient analysis that found multiple sectors showed signs of employment specialisation within the region.

- While the long term employment impact of COVID-19 remains uncertain, supporting employment pathways into growth industries will be essential to maximising opportunities and attract and retain workers with the required skills and qualifications.

Strong employment growth is projected in the Education and Training, Accommodation and Food Services, Construction, Health Care and Social Assistance and the Retail Trade sectors. These sectors also experienced above average growth in gross value add.

The region is likely to experience challenges related to persistent disadvantage in the Benalla Shire, which has a persistently high unemployment rate as compared to other parts of the region.

- This places considerable pressure on social and health services.
- In the longer-term, negative inter-generational impacts and entrenched disadvantage may persist, unless the issue is addressed.

The labour market in Ovens Murray is relatively self-contained. However due to its proximity to the NSW border and the economic and social interactions between Albury and Wodonga, there is significant labour transaction across the Indigo, Wodonga and Albury corridor. Employment, investment and training opportunities must take into consideration the close relationship among the border towns and regional cities.

Employment[10]

In 2020 there were 62,078 employed persons within Ovens Murray (see Figure 1.4.1). Health Care and Social Assistance (8,685 workers) was the largest employing sector, followed by Agriculture, Forestry and Fishing (6,689 workers) and Manufacturing (6,662 workers). The top seven employing industries account for almost 70 per cent if the region's workforce. Agriculture, the largest employing sub-industry, employees approximately 9.4 per cent of all workers in the Ovens Murray region and 87 per cent of all workers within the Construction sector (see Figure 1.4.2).

Figure 1.4.1: Employment by Industry — Ovens Murray
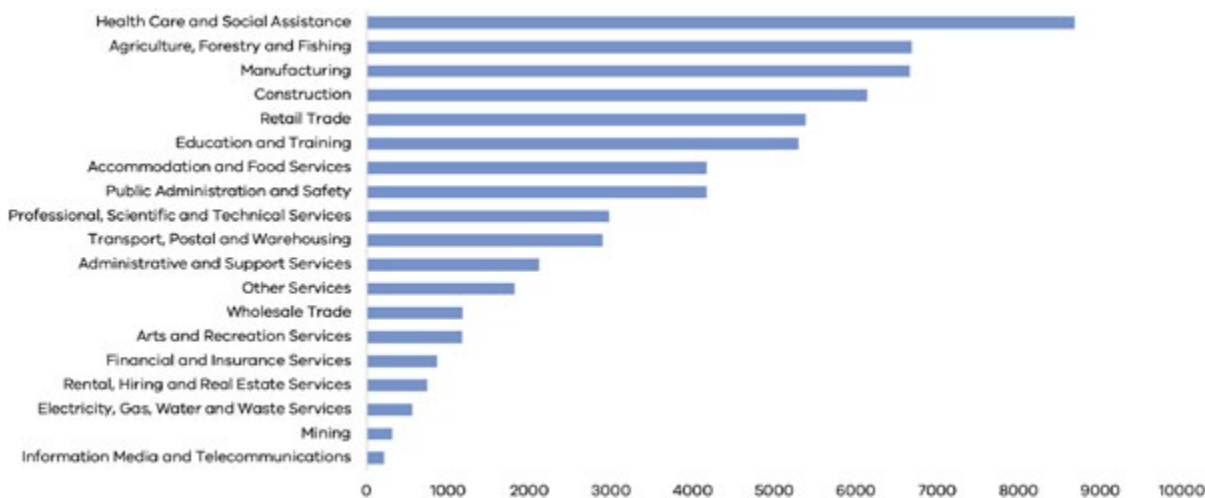
Source: (NIEIR, 2020)

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

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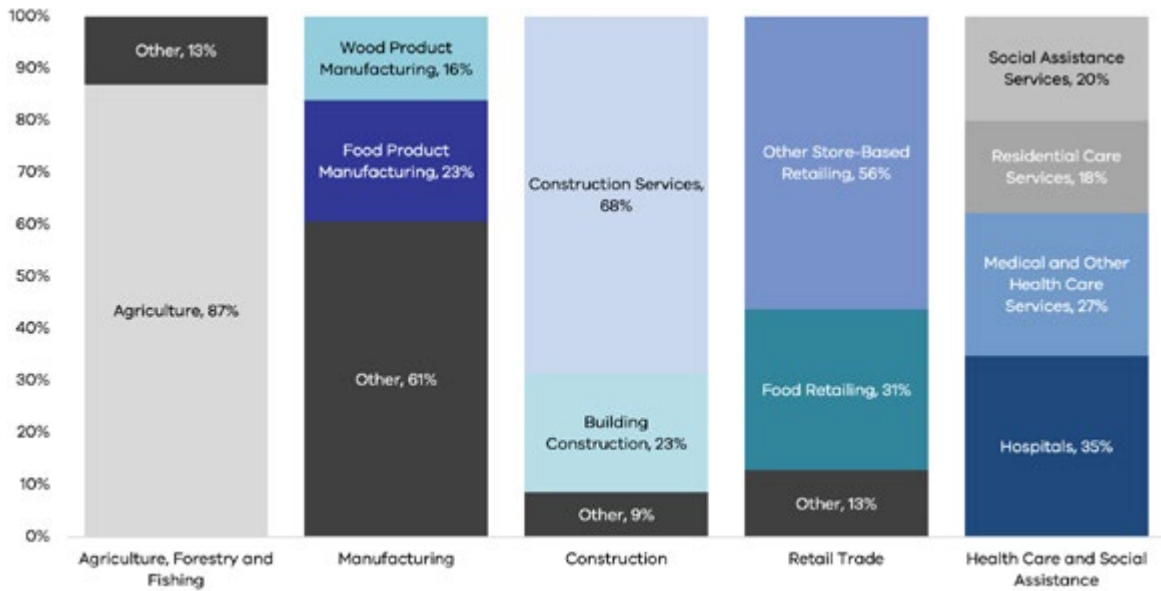
Source: (NIEIR, 2020)

The 10-year average annual growth for employment in the region was 0.4 per cent. This was lower than regional Victoria (1.0 per cent) and metropolitan Melbourne (2.1 per cent). Within the region, nine (of the 19) industries 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)
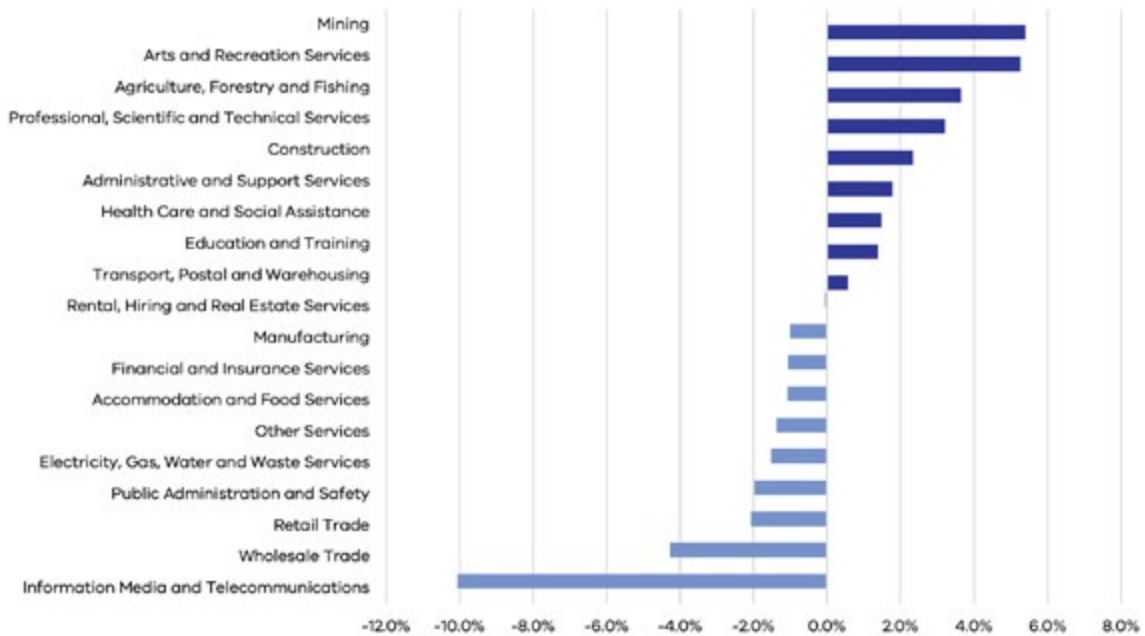
Source: (NIEIR, 2020)

Pre-COVID employment projections (see Figure 1.4.4) forecast an increase of 5.1 per cent in the workforce, driven by employment in Education and Training and Accommodation and Food Services. The largest fall in absolute and percentage terms was to be within the Arts and Recreation Services sector. However, due to the significant disruptions caused by COVID-19, employment outcomes may now be significantly different from those forecast.

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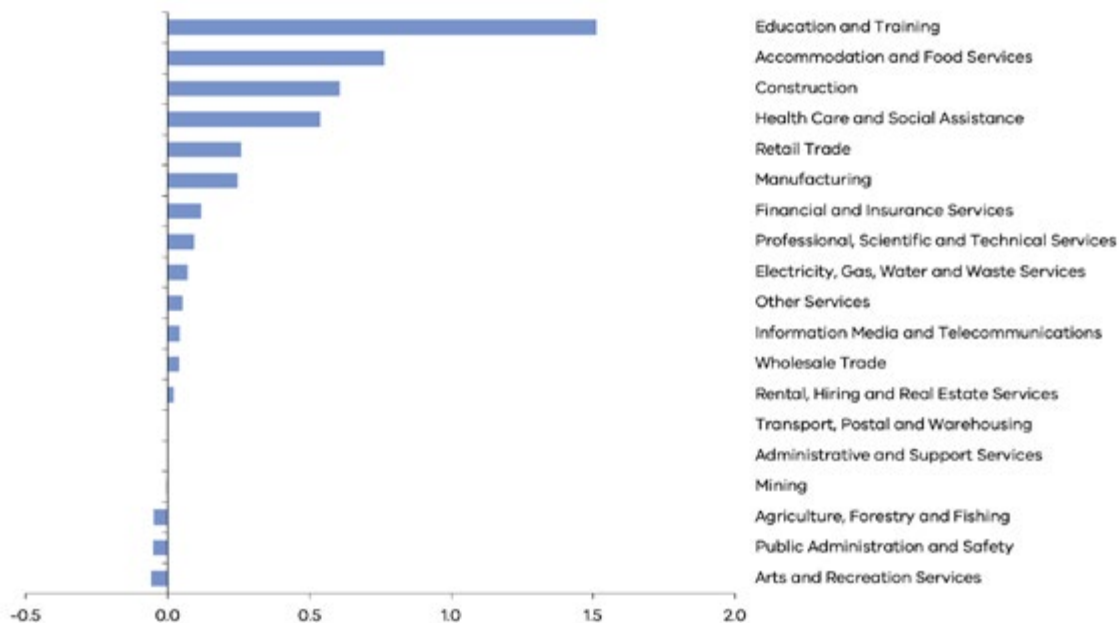
Source: (National Skills Commission, 2020)

The Ovens Murray region has a higher share of workers engaged in part time employment (34 per cent) compared to metropolitan Melbourne (32 per cent), but has a lower share compared to regional Victoria. Of those employed in the region, 34 per cent of employees work part time, compared to 35 per cent in regional Victoria and 32 per cent metropolitan Melbourne (see Figure 1.4.5).

Figure 1.4.5: Composition of Employment (2020)
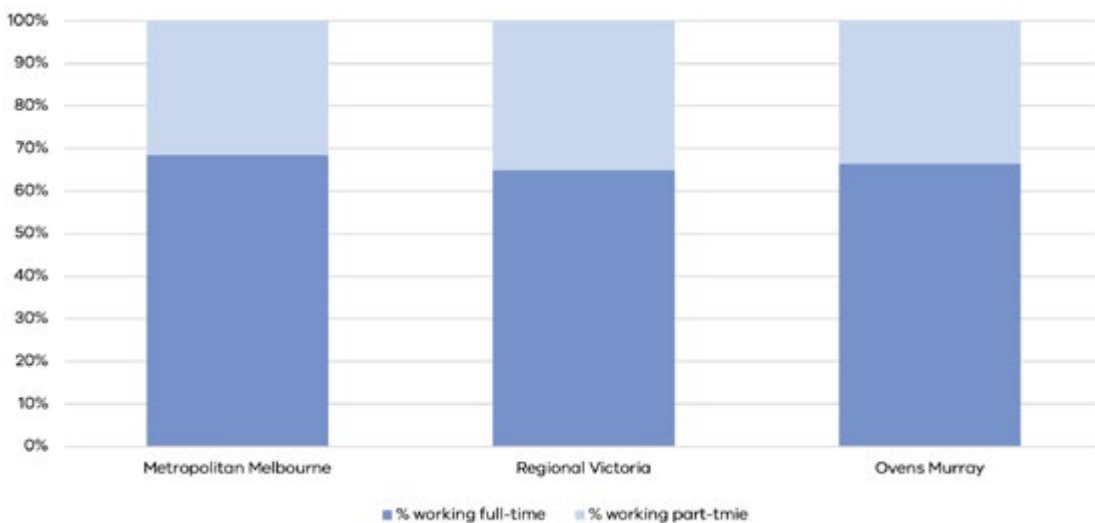
Source: (NIEIR, 2020)

Unemployment rate

Over the last 10 years, Ovens Murray has had a lower unemployment rate than metropolitan Melbourne (see Figure 1.4.7).

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

The region's long-term unemployment rate (December Qtr 2010 to March Qtr 2021) is 4.7 per cent; just below that of regional Victoria (5.3 per cent) and metropolitan Melbourne (5.8 per cent).

Unemployment rate estimates since COVID has seen the unemployment rate in the region decline to 3.4%, well below the regional average.

The downward trend in unemployment over time has been relatively consistent across municipalities, as Wodonga and Benalla maintained the region's highest level of unemployment and Indigo, Alpine and Mansfield with similar, lower rates of unemployment.

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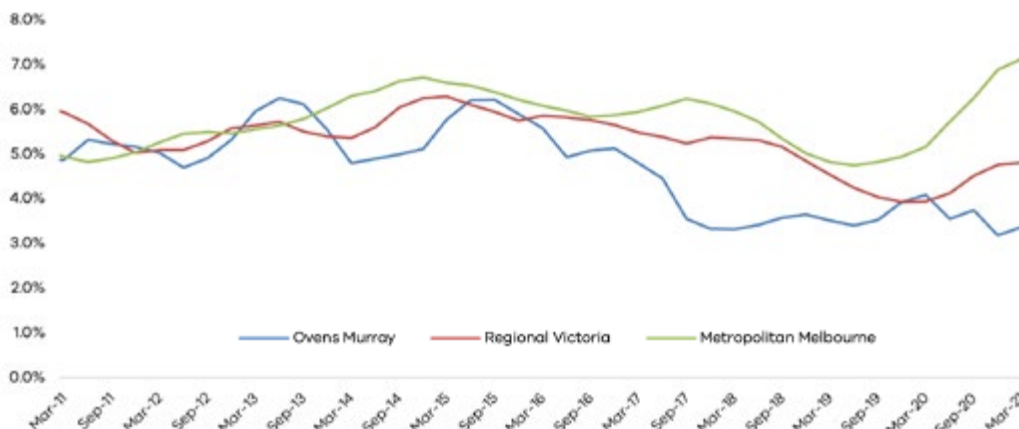
Source: (National Skills Commission, 2021)

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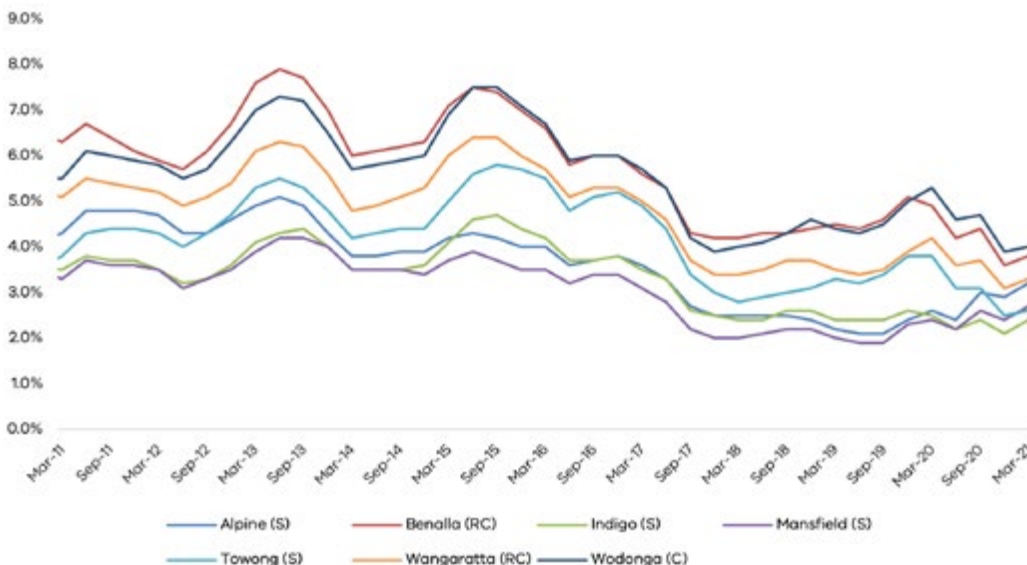
Source: (National Skills Commission, 2021)
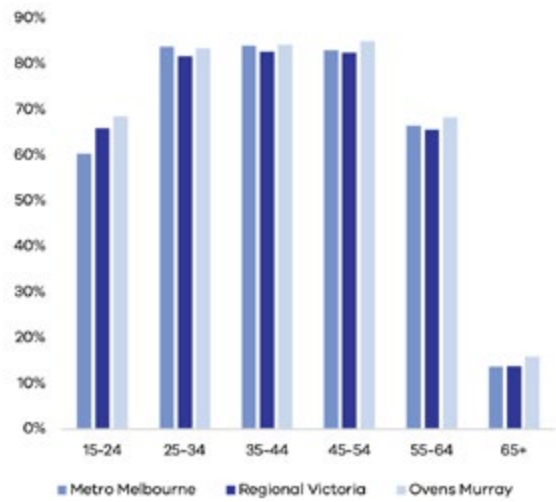
Participation rate

The labour force participation rate in the Ovens Murray region (62.4 per cent) is slightly higher than the average across regional Victoria (60.9 per cent) (see Figure 1.4.8).

This is driven by higher participation rates across all age groups (see Figure 1.4.9). However, the region's participation rate remains below that of Greater Melbourne (65.8 per cent).

Figure 1.4.8: Participation Rate (2016)
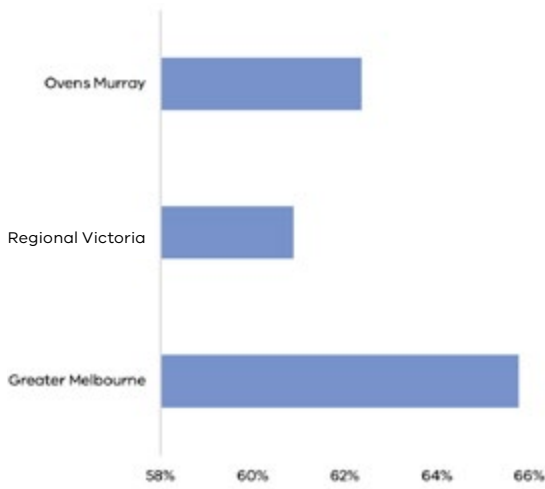
Figure 1.4.9: Participation Rate Age Comparison

Source: (ABS Census, 2016)

The female labour force participation rate in Ovens Murray (58.3 per cent) is significantly lower than the male participation rate (66.7 per cent), which is consistent with the pattern seen in both regional Victoria and metropolitan Melbourne. This does however present an opportunity to boost future economic growth if participation rates among women were to be lifted. (see Figure 1.4.10).

**Figure 1.4.10:** Participation Rate by Gender (2016)
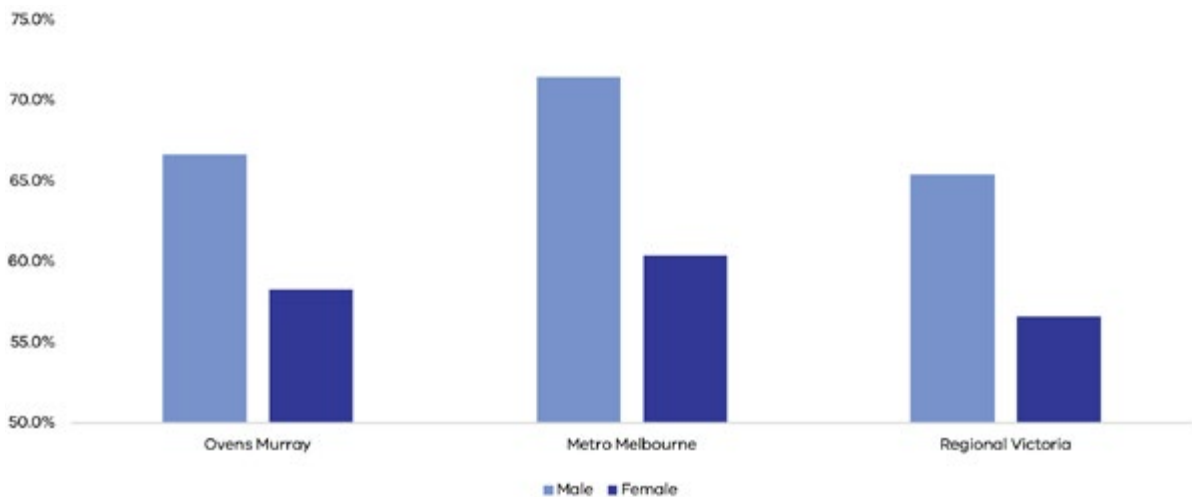
Source: (ABS Census, 2016)

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

Since 2001, labour productivity in the Ovens Murray region has remained steady at around $115,000 in GRP per workers. This is slightly lower than the regional Victorian average, which has been declining since 2001, converging towards Oven's Murray. Over the same time however, metropolitan Melbourne saw a steady increase. (see Figure 1.4.11).

GRP per worker differs significantly across the LGAs within the region. In 2020, Wangaratta has the lowest labour productivity among councils, while Benalla and Towong remained the highest, both having registered growth in productivity, particularly in the later half for the 2010s (see Figure 1.4.12).

Figure 1.4.11:
Regional Productivity per worker
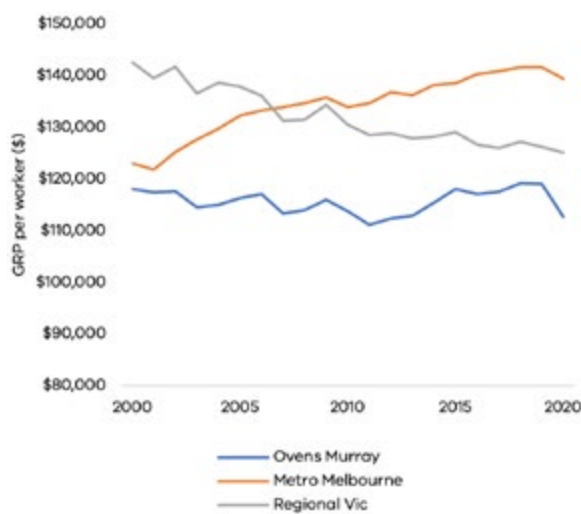
Figure 1.4.12:
LGA Productivity per worker
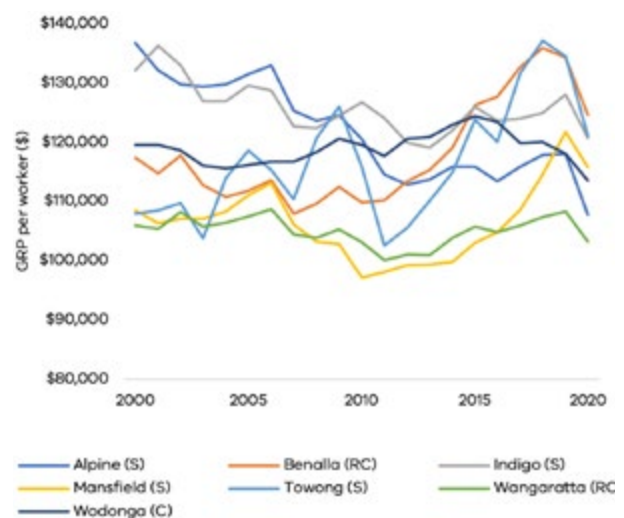
(NIEIR, 2020)

Worker mobility and commuting across regions

The LGAs within Ovens Murray are largely self-sufficient in their labour markets, with little movement between LGAs for commuting to work. Indigo and Wodonga are however the exception to this.

Within the Indigo Shire, only 44% of employed residents work within their shire (otherwise known as Employment Self-containment) (see table 1.4.13). This is reflected in the high level of commuting to nearby regional cities of Wangaratta (500 people), Wodonga (1,500 people) and across the border into Albury (1,000 people) for work (see table 1.4.14).

In Wodonga, 63 per cent of its employed residents work within Wodonga, while over 5,000 residents travel into Albury for work. This reflects the close relationship between Albury and Wodonga and the high level of interconnectedness.

Looking at other councils, the vast majority of people work in the LGA in which they live, and local jobs are filled by local residents. For example, in Mansfield, 91% of local jobs employ a local resident.

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.

Table 1.4.13: Labour mobility

	Alpine (S)	Benalla (RC)	Indigo (S)	Mansfield (S)	Towong (S)	Wangaratta (RC)	Wodonga (C)
Total local workers (working anywhere) (UR)	5,489	5,654	7,491	3,780	2,668	12,620	18,196
Number of jobs in local area (POW)	4,617	5,074	4,826	3,223	2,013	12,310	18,804
Number of local jobs held by locals	4,041	4,118	3,172	2,916	1,678	10,140	11,036
Number of locals employed outside LGA	1,176	1,277	4,008	626	897	1,997	6,530
Employment Self containment	77%	76%	44%	82%	65%	84%	63%
Employment Self Sufficiency	88%	81%	66%	91%	83%	82%	59%

Source ABS, Census 2016

Table 1.4.14: Labour mobility across LGAs

Place of work → / Place of residence ↓	Alpine (S)	Benalla (RC)	Indigo (S)	Mansfield (S)	Towong (S)	Wangaratta (RC)	Wodonga (C)	Outside Ovens Murray
Alpine (S)	4,041	14	112	0	18	287	148	597
Benalla (RC)	13	4,118	3	65	0	525	17	654
Indigo (S)	121	18	3,172	0	82	468	1,475	1,844
Mansfield (S)	0	56	0	2,916	0	28	0	542
Towong (S)	0	0	50	0	1,678	7	338	502
Wangaratta (RC)	225	463	312	22	0	10,140	240	735
Wodonga (C)	43	20	473	0	102	132	11,036	5,760
Outside Ovens Murray	166	381	700	212	133	715	5,532	

Source: (ABS Census, 2016)

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

1.5
Skills

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 livestock farmers, registered nurses and primary school teachers increase.

- 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, 40,000 workers in Ovens Murray worked in skilled occupations (62.1 per cent). As a proportion of the total workforce, this is comparable to regional Victoria (62.2 per cent) and lower than metropolitan Melbourne (67.3 per cent). In the five years to 2021, the number of skilled workers increased by approximately 2,500 workers (6.6 per cent), while the number of low skilled workers decreased by approximately 1,800 workers (7.0 per cent). The rising number of skilled workers is consistent with trends across regional Victoria and metropolitan Melbourne, where employment among skilled workers grew by 8.8 per cent and 22.1 per cent respectively.

Livestock farmers was the single largest employing occupation in Ovens Murray, with sales assistants (general) and registered nurses rounding out the top three. In the five years to 2021, eight of the top ten employing occupations experienced an increase in total number of workers. Six of the top ten employing industries were skilled occupations all of which experienced growth in total workers between 2016 and 2021.

Table 1.5.1: Top 10 employing occupations

Ovens Murray	2021	2016	Change	Skill level[11]
Livestock Farmers	3,900	3,400	600	Skilled
Sales Assistants (General)	2,800	3,400	−600	Low Skilled
Registered Nurses	2,200	1,700	400	Skilled
General Clerks	1,600	1,600	−0	Low Skilled
Retail Managers	1,500	1,400	100	Skilled
Motor Mechanics	1,300	1,300	100	Skilled
Secondary School Teachers	1,300	1,000	200	Skilled
Truck Drivers	1,300	1,200	100	Low Skilled
Primary School Teachers	1,200	1,000	200	Skilled
Receptionists	1,200	1,200	0	Low Skilled

(Department of Education and Training, 2021)

11. 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.

02
Comparative Advantage

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

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

Nonetheless, the above analysis provides a consistent picture of the region's revealed comparative advantage. The region has a strong advantage in Agriculture, Forestry and Fishing, Public Administration and Safety, and some Manufacturing and Health Care and Social Assistance industries, as represented by a mix of high levels employment specialisation, strong GVA growth and business clustering. Furthermore, while accommodation and food retailing has not shown such strong results, the local industry performed strongly across a range of metrics reflecting the important the sector pays in the local economy.

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 (Ovens Murray, Industry profile, 2019), and built upon by a number of other government analysis found the region has considerable strengths across a range of attributes:

2.1
Transport Infrastructure

Ovens Murray is to the North East of Melbourne and is a thoroughfare connecting the south of the state to NSW and Canberra. The region is well connected via road and rail and the regional cities are generally well connected, being within 100km of each other. Additionally, the region's transport links to Melbourne and Sydney (see Figure 1.6.1) allow economic activity to occur interstate and allows access international markets for the region.

A regional profile of the Ovens Murray, completed in 2019 for Infrastructure Victoria, identified that key transport infrastructure is centred around the road network, such as the Hume Freeway. The Hume connects Melbourne to Canberra and Sydney and goes through the centre of Ovens Murray Regional Partnership region. Additionally, the Midland Highway connects the region to Melbourne and Geelong, and the Maroondah Highway connects Mansfield in the south to Melbourne.

The region has strong rail links to Melbourne and Sydney with both freight and direct passenger routes via Wodonga and Wangaratta. Freight access will be further improved with a direct freight route from Oaklands to Yarrawonga joining at Benalla and the Inland Railway expected to be operational by 2025. Access to public transport in the region is lower than the state, while Wangaratta, Benalla and Wodonga have the highest levels of access.

The region has several smaller regional airports and the north has access to Albury Airport, while the south can access Melbourne's airports. There is also freight rail access and road access to the Port of Melbourne.

Figure 2.2.1: Transport Connections, Ovens Murray

Source: (Infrastructure Victoria, 2019)

2.2
Digital Infrastructure[12]

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

Table 2.2.1: ADII score comparison 2021, VIC

Local Government Area	Score
Alpine	63.0
Benalla	61.0
Indigo	66.0
Mansfield	62.0
Towong	62.0
Wangaratta	65.0
Wodonga	69.0
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, Ovens Murray

(NBNco, 2020)
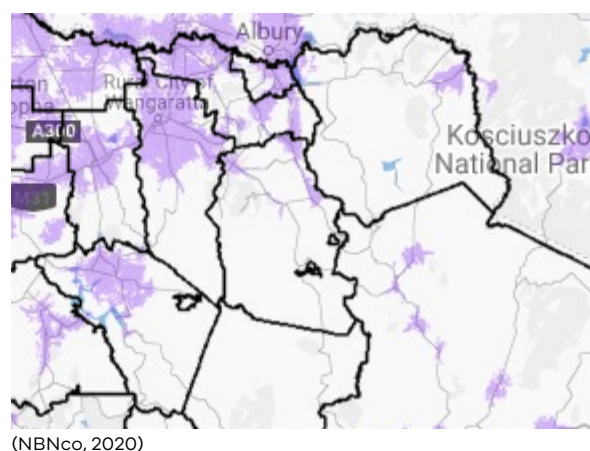
2021 Connecting Victoria roundtable discussions identified a number of key digital issues for the region;

- Increased need for better home connectivity to support remote work, learning and tele health
- Need for better and more reliable connectivity during natural disasters and emergencies such as bushfires
- Need for competitive internet speeds for businesses and tourism, in particular the current infrastructure struggles during peak tourism demand
- Need to increase the regions digital literacy in conjunction with infrastructure improvements.

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

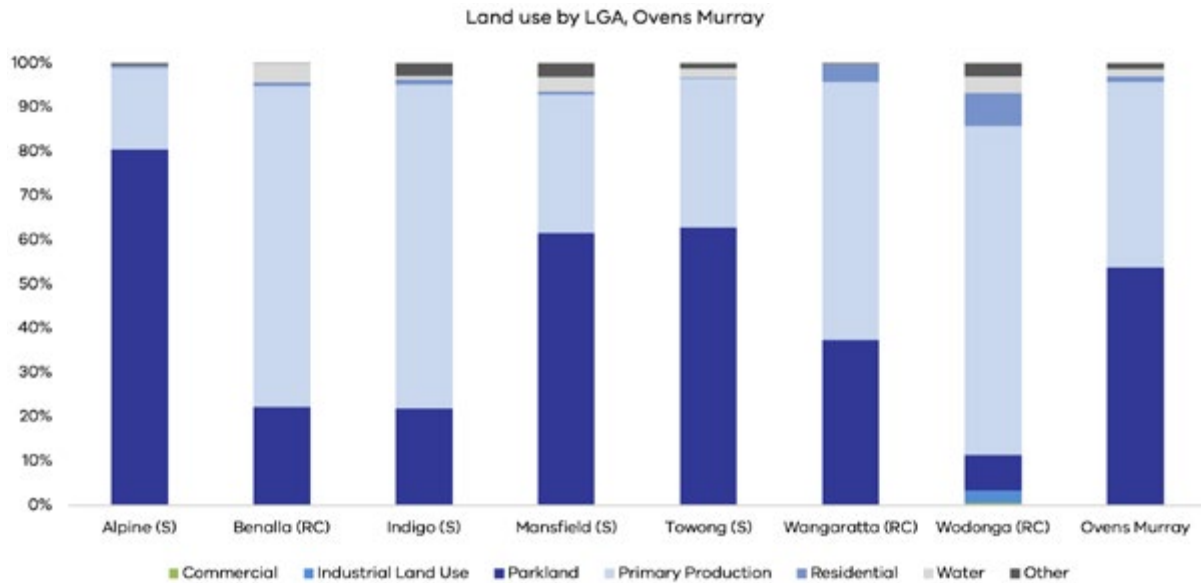|	**Fixed broadband access**	**Mobile access**
Cities and large towns, such as Wodonga	Generally comparable to metropolitan Melbourne with some access to FTTP and widespread provision of FTTN within town centres, but fixed wireless and satellite serving the town fringe and beyond	Generally comparable 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 Yackandandah and Porepunkah	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 dairy grazing around Benalla	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 Alpine Resorts	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)
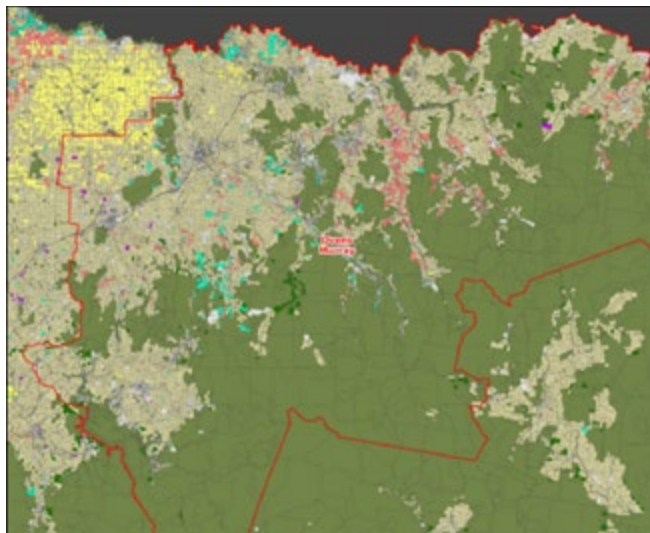
2.3
Natural Endowments

Land use in the region is varied from east to west. The region has much less of its native vegetation cleared than other parts of the state, due to the large amount of national and state parkland in the eastern and southern parts of the region (Figure 2.3.1 and 2.3.2). Alpine, Mansfield and Towong have the most land used for parkland in their boundaries. Primary production is the second largest land use after parkland. Grazing and Dairy takes up much of the land surrounding the native parkland. The region includes the alpine ranges and is bordered by the Murray River. Reserves of water include Lake Eildon in the south, Lake Dartmouth to the east and Lake Hume to the north. The region is a part of the Murray-Darling Basin and water flows from the alpine region down through the Ovens River, Kiewa River and Mitta-Mitta river.

The ecosystems of the Alpine regions and surrounding valleys are important locations of agricultural production and remain a popular tourist destination, attracting visitors year-round.

Figure 2.3.1: Land Use by LGA

Land use by LGA, Ovens Murray

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

The Ovens Murray Region has a diversity of landscapes and environments, including snow-covered mountains, forests and woodlands, river red gum floodplains, mixed farms, irrigated pastures and orchards (State Government Victoria , 2014). This land provides environmental, social and economic value to the region (summarised in Table 2.3.3 and displayed in Figure 2.3.4).

The water resources of the region are critical to the region's position as the major food producing area of the state, and its waterways play a central role in its appeal for tourism. The region is subject to natural hazards such as bushfire and flood and extreme climatic conditions, including drought.
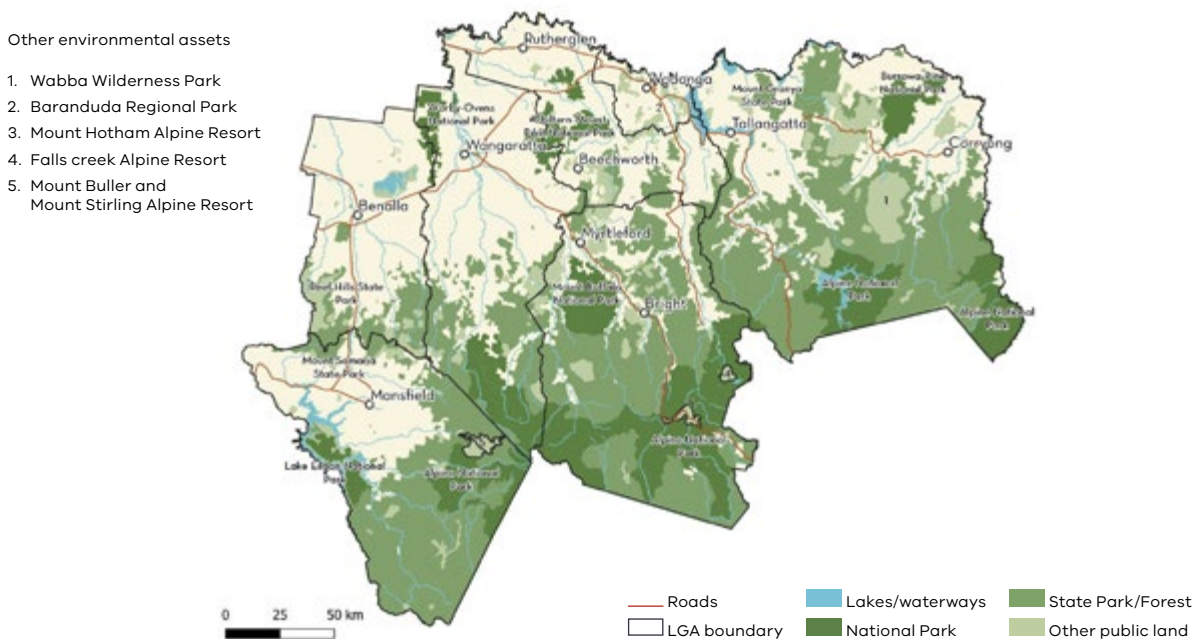
The Alpine resorts and surrounding state and national parks are high value environmental assets, located in the Mansfield, Alpine and Towong LGAs. The area draws tourists during both summer (for hiking, mountain biking, camping and hunting) and winter (for winter sports). As well as being of environmental value the Alpine resorts Falls Creek, Mount Hotham and Mount Buller are large economic contributors to the region

Table 2.3.3: Key Environmental Assets, Ovens Murray

National Parks	State Forest and State Parks	Other
• Alpine National Park • Mount Buffalo National Park • Warby-Ovens National Park • Burrowa-Pine Mountain National Park • Parts of Lake Eildon National Park • Parts of Yarra Ranges • Parts of the Kosciuszko National Park • Chiltern-Mount Pilot National Park • Chiltern National Park	• Reef Hills State Park • Mount Samaria State Park, Mt Granya State Park • Warby Ranges State Park	• Wabba Wilderness Park • Baranduda Regional Park • Mount Hotham, Falls Creek Alpine Resorts, Mount Buller and Mount Stir-ling • Conservation reserves such as the Lake Moodemere Reserve

Source: (Infrastructure Victoria, 2019)

Figure 2.3.4: Key Environmental Assets, Ovens Murray

Other environmental assets

1. Wabba Wilderness Park
2. Baranduda Regional Park
3. Mount Hotham Alpine Resort
4. Falls creek Alpine Resort
5. Mount Buller and
   Mount Stirling Alpine Resort

Roads — Lakes/waterways — State Park/Forest
LGA boundary — National Park — Other public land

Source: (Infrastructure Victoria, 2019)

Mineral resources and forestry

The main mineral resources within the Ovens Murray region have been gold and tin, as well as sand and stone extraction. However, there are now relatively few active operators in the Ovens Murray region. Future mining opportunities may exist for gold, precious metals, base metals, brown coal and molybdenum (State Government Victoria , 2014).

The Ovens Murray region supports a large softwood plantation and commercial timber industry. Nearly 7% of the labour force in the Alpine Shire is employed in the timber industry and nearly 5% in Benalla Rural City.

The Hume region has approximately 65,000 ha of pine plantations including Hancock Victorian Plantations' in Koetong, Berringama and Shelley Plantations in the Towong Shire (Infrastructure Victoria, 2019). Over 10 medium to large businesses are involved in the harvest and haulage of the softwood resource.

The region hosts a number of large softwood processing facilities.

The native timber industry in the region has a long history but is now relatively small, with one medium-sized hardwood mill in Benalla and a smaller mill in Corryong.

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

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

Renewable energy

While renewable energy sources have not been a strong focus in the Ovens Murray region to date, there is hydropower in the region and strong uptake of rooftop solar.

As at 2019, hydropower is generated at the Kiewa Scheme, which comprises several stations at McKay Creek, Bogong, Clover and West Kiewa, which are in the Alpine Shire. Combined, these stations generate an average annual output of 404GWh.

The region also has several smaller power stations, such as:

- The Dartmouth Power Station in Towong Shire. Located approximately 100 kilometres south-east of Wodonga and generates an annual average output of 217 GWh.
- The Eildon Power Station on the border of Mansfield and Murrindindi Shire. Located on the banks of lake Eildon and generates an annual average output of 184 GWh (AGL, 2020).

The uptake of renewable energy has been driven at the local level by a large number of small community energy groups in Benalla, Rutherglen, Yackandandah, Bright, Tallangatta, Albury Wodonga, Wangaratta and Mansfield. Community renewable energy projects are owned and run by local communities. Community energy projects are diverse and can include solar panels; hot water bulk buys; micro or mini grids; and community-owned solar or wind farms or electricity retailers (DELWP, 2019).

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

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

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04
Strategic context

Ovens Murray Regional Economic Development Strategy

The following table describes the local strategies, plans and frameworks that shaped the Ovens Murray 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

Hume Strategy for Sustainable Communities 2010–20		
Purpose	The Hume Strategy for Sustainable Communities seeks to develop: • a thriving and dynamic economy • an integrated network of efficient and high functioning transportation systems	
Identified priorities	• Environment: Natural resources protected and enhanced for current future generations • Community: Healthy, vibrant and resilient communities • Economic: A thriving and dynamic economy • Transport: an integrated network of efficient and high functioning transportation system • Land use: an efficient and sustainable pattern of urban and rural land use and development	
Influence on the REDS strategic directions	✔	Transport and logistics
		Visitor economy
		Manufacturing
		Resources
	✔	Health and social services

Hume Regional Growth Plan 2014		
Purpose	• Strengthen the efficiency and sustainability of settlements and rural communities • Improve the diversity and resilience of the regional economy • Improve connectivity and mobility • Protect natural assets and heritage	
Identified priorities	• Efficient and sustainable settlements • Sustainable rural communities • A healthy environment and a celebrated heritage • Healthy, vibrant, resilient communities • A thriving and dynamic economy • A mobile and connected region	
Influence on the REDS strategic directions	✔	Transport and logistics
	✔	Visitor economy
	✔	Manufacturing
		Resources
	✔	Health and social services

A Double Triple Vision for Victoria Report	
Purpose	A collaboration between all regional RDA committees in Victoria, the Double Triple Report establishes a strategic agenda for the committee to support future growth and prosperity for rural and regional communities around the state.
Identified priorities	The Double Triple Vision report focuses on the doubling of regional Victoria's population and tripling of its economic output by 2040. The report identified key interventions all tiers of government can take to achieve this vision, including include digital connectivity, population management, workforce skills, new energy, placed-based developments, health and social outcomes, and business competitiveness.
	The report identifies agriculture, manufacturing, coal and other energy sectors, professional services and skills, innovation hubs, regional capitals and infrastructure and digital connectivity as priority industries/focus areas to grow regional Victorian economies.
Influence on the REDS strategic directions	✔ **Transport and logistics**
	Visitor economy
	✔ **Manufacturing**
	✔ **Resources**
	✔ **Health and social services**

Hume Regional Renewable Energy Roadmap 2019	
Purpose	The Roadmap provides a region- specific strategy for Hume. The Roadmap was identified as a priority project through the Goulburn and Ovens Murray Regional Partnerships. The Roadmap seeks to expand the existing economic, social and environmental benefits achieved through renewable energy initiatives and keep the benefits of local energy investments within the community.
Identified priorities	The Roadmap identifies the following priorities and focus areas: • Distributed energy resources • Pumped hydro energy storage • Large scale solar • Bioenergy
Influence on the REDS strategic directions	**Transport and logistics**
	Visitor economy
	Manufacturing
	✔ **Resources**
	Health and social services

Victoria's High-Country Destination Management Plan
2013–2023

Purpose	Identifies regional project priorities over the coming decade, with the region's efforts focused on the priority projects best positioned to leverage collaborative efforts and deliver positive tourism results for the High Country. The plan seeks to increase total visitation and the proportion of domestic, international and overnight visitors.
Identified priorities	• Ride High Country – Rail Trails • Ride High Country – Mountain Bikes • Food, Wine and Beer Industry Innovation • Alpine Snow Growth • Alpine Resort Green Season Activation, • Inland Waterway Hubs • Arts and Culture Invigoration • Digital Excellence

Influence on the REDS strategic directions		**Transport and logistics**
	✔	**Visitor economy**
	✔	**Manufacturing**
		Resources
		Health and social services

Ovens Murray Digital Plan
2019

Purpose	Guide and support a strong, innovative and inclusive digital future for our region.
Identified priorities	• Digital awareness, access to digital services, training and good practice among business, services and industries • Digital skills, removal of digital divide and growth of the digital economy • Digital data use, use of data management practice to apply data for monitoring, benchmarking, informed decision making. • Digital connectivity, encourages uptake of existing and new technologies that connect people, support service delivery, increase business productivity and underpin community safety and resilience.

Influence on the REDS strategic directions	✔	**Transport and logistics**
	✔	**Visitor economy**
	✔	**Manufacturing**
	✔	**Resources**
	✔	**Health and social services**

Alpine Shire, Community Vision 2030	
Purpose	Guides The Alpine Shire's direction for short, medium- and long-term planning by providing a roadmap and vision to create a sustainable community for all residents of the Shire.
Identified priorities	• Unspoilt natural environment • Sympathetic and balanced development • Economic prosperity, diverse employment with focus on tourism, community services, niche agriculture and horticulture • Identity and character of our towns, villages and rural communities, tourism development in Bright and mount beauty • Services and facilities (health, wellbeing and lifestyle) well planned health and community services and infrastructure catering for all ages and offer choice • Linkages between communities, affordable transport links and greater use of walking, cycling and electronics vehicles. • Strong and safe communities, through active engagement and embracing heritage and diversity.
Influence on the REDS strategic directions	✔ **Transport and logistics** ✔ **Visitor economy** ✔ **Manufacturing** **Resources** ✔ **Health and social services**

Mansfield Shire Economic Development Strategy 2020–25	
Purpose	The Mansfield Shire Economic Development Strategy (the strategy) has been prepared to guide the growth and resilience of the local economy over the five tears period between 2020-25. The strategy responds to issues, challenges and opportunities and identifies four key themes and associated objectives.
Identified priorities	• Strengthen and diversify the economy • Build a sustainable resident base through targeted workforce and resident attraction • Enhance the visitor economy • Drive growth in infrastructure and public land enhancement
Influence on the REDS strategic directions	✔ **Transport and logistics** ✔ **Visitor economy** ✔ **Manufacturing** **Resources** ✔ **Health and social services**

Wangaratta Rural City Economic Development Strategy 2018–2023	
Purpose	The Economic Development Strategy has been produced by the Rural City of Wangaratta to fulfil Council's aspirations for a vibrant and prosperous community. The strategy seeks to strengthen driver sectors (agriculture, food/beverage, adventure tourism, health and community care, manufacturing and small business), skill up the labour force, invest in strategic infrastructure and support local businesses.
Identified priorities	• Multi- industry business development, with focus on business growth, attracting new firms, skill gaps • Brand Wangaratta • Value adding to agriculture output, secondary production opportunities, attract new investment. • Growing food and beverage tourism, attracting new investment and align existing tourism infrastructure with agricultural producers to drive visitation. • Growing active tourism with focus on develop King Valley Rail Trail, Ned Kelly Alive and enhance tourism experience • A National centre of excellence for health education, training and research, with focus on education accommodation, hospital precinct, health industry, product services • Supporting key manufacturing enterprise to adopt and diversify and grow, with focus on building innovative capacity. • Infrastructure and land, with focus on improve logistics, aerodrome development, passenger service transport
Influence on the REDS strategic directions	✔ **Transport and logistics**
	✔ **Visitor economy**
	✔ **Manufacturing**
	Resources
	✔ **Health and social services**

UM2030 Masterplan, Upper Murray 2030 Vision Plan (Towong Shire)
2016

Purpose	The Upper Murray 2030 Vision Plan is the outcome of a community led planning project which identifies and explores the implementation of "game changing" projects for the Upper Murray region.
Identified priorities	Focus areas: • Governance and implementation • Infrastructure and built environment • Business and industry, • Wellbeing and liveability Aims: • Improve the diversity of employment opportunities • Strengthen innovation and technology adoption in the agricultural sector • Strengthen the visitor economy • Improve connectivity (digital and physical)

Influence on the REDS strategic directions	✔	**Transport and logistics**
	✔	**Visitor economy**
	✔	**Manufacturing**
		Resources
	✔	**Health and social services**

Albury-Wodonga Regional Economic Development Strategy (NSW Government)
2018–22

Purpose	The Albury – Wodonga Regional Economic Development Strategy 2018–2022 (the Strategy) sets out a long-term economic vision and associated strategies for the Albury-Wodonga Economic Region.
Identified priorities	• Grow agribusiness and soft wood industries • Grow the transport and logistics sector • Continue to develop and grow the tourism sector • Growth the healthcare sector • Attract and retain talent • Capitalise on the region's ability to be a special economic zone

Influence on the REDS strategic directions	✔	**Transport and logistics**
	✔	**Visitor economy**
	✔	**Manufacturing**
		Resources
	✔	**Health and social services**

Indigo Shire Economic Development Strategy 2018			
Purpose	Five-year strategy (2018/19 - 2022/23) that provides direction for Indigo Shire to build on its economic strengths, while supporting the economy through leadership and collaboration.		
Identified priorities	• Business engagement • Investment attraction • Infrastructure development • Vibrant and activated town centres • Support for agriculture and the agri-food sector		
Influence on the REDS strategic directions	✔	Transport and logistics	
	✔	Visitor economy	
	✔	Manufacturing	
		Resources	
		Health and social services	

Benalla Rural City Tourism and Events Strategy 2018–22			
Purpose	The strategy sets out a plan for growing the visitor economy, setting a target of capturing 11.5% of the High Country's visitors by 2022. The strategy envisions to increase visitor spend, consolidate existing and develop new tourism products, build an increased culture of collaboration.		
Identified priorities	• Offering iconic experiences, build a depth and range of experiences which provide visitors with a compelling range of reasons to visit Benalla • Events and build a strong year-around program of curated events to promote visitation and increase visitor interest in the area. • Leveraging existing strength • Partnerships, engagement and ownership of tourism in Benalla • Building and activating attractive precincts		
Influence on the REDS strategic directions		Transport and logistics	
		Visitor economy	
	✔	Manufacturing	
		Resources	
		Health and social services	

Economic Development Strategy, Gunaikurnai Land and Waters Aboriginal Corporation
2017–22

Purpose	The strategy aims to provide a short to medium-term focus for GLaWAC's economic and business development program. It was designed to align with other relevant statewide and regional plans and strategies, as well as the Whole of Country Plan goal of economic independence.
Identified priorities	The Strategy explores GLaWAC's three roles in economic and business development: • Commercial enterprise development: pursuing commercial business opportunities that support the ongoing financial growth and sustainability of GLaWAC. • Investment attraction and facilitation: identifying, facilitating and supporting major investment into the Gippsland region which is expected to lead to increased employment opportunities and prosperity for the Gunaikurnai community • Small to medium-sized enterprise (SME) business support: Providing support, guidance and advice to small to medium-sized Gunaikurnai-owned businesses with a view to helping facilitate wealth and prosperity.

Influence on the REDS strategic directions		Transport and logistics
	✔	Visitor economy
	✔	Manufacturing
		Resources
		Health and social services

Gunaikurnai Whole of Country Plan, Gunaikurnai Land and Waters Aboriginal Corporation
2015

Purpose	The Plan aims to set the foundation for how the Gunaikurnai people will move forward, manage Country and participate in society. It contains decision-making principles and seven goal areas that together paint a picture of the future the Gunaikurnai people aspire to.
Identified priorities	• Employment, job opportunities and training opportunities in natural resource management and ranger programs • Develop a cultural heritage strategy and promote Gunaikurnai history • Investigate and pursue new business opportunities that use our unique strengths, including bushfood and native fauna farming enterprises, seed collection, nursery management and carbon farming. • Build-up Gunaikurnai tourism and cultural awareness enterprises across our Country

Influence on the REDS strategic directions		Transport and logistics
	✔	Visitor economy
		Manufacturing
		Resources
		Health and social services

Co-operative Management Agreement, Yorta Yorta Nation Aboriginal Corporation and the State of Victoria
2004

Purpose	The Agreement seeks to facilitate: • The active involvement of the Yorta Yorta People in decisions about the management of Designated Areas • The development of mutual recognition and trust between the Yorta Yorta People and the State • The identification and promotion of employment, training and economic development opportunities for the Yorta Yorta People
Identified priorities	• To leverage significant opportunity for Yorta Yorta People through the management of designated areas. • To protect, maintain and render sustainable the environmental value of designated areas. • To assert culture connection, based on ancestry and tradition to designated areas which include but are not limited to the: Barmah State Park, Murray River Reserve, Murray River State Reserved Forest, Know Swamp Water Supply Reserve, Goulburn River State Forest and Kanyapella State Forest and maintain cultural values.

Influence on the REDS strategic directions		
		Transport and logistics
	✔	Visitor economy
		Manufacturing
		Resources
		Health and social services

Strategic Plan, Taungurung Land and Waters Council Aboriginal Corporation (TLaWC) 2016–2020	
Purpose	The one-page plan outlines the aspirations of the TLaWC based on the following vision and values: Vision: • Protecting our Rights • Building our Future Values: • Celebrating Taungurung identity • Engaging with respect • Influencing with integrity • Driving change through leadership
Identified priorities	Key strategies include: • Invest in our business • Pursue economic opportunities • Generate income • Create employment • Bring the mob together • Revive our language, Communicate through electronic and other means • Contribute to health and wellbeing • Connect to culture • Protect the heritage and environmental values of country
Influence on the REDS strategic directions	Transport and logistics
	✔ Visitor economy
	Manufacturing
	Resources
	✔ Health and social services

Taungurung Country Plan Taungurung, Land and Waters Council Aboriginal Corporation (TLaWC)	
Purpose	Provides an outline of Taungurung Country, Culture and People, and communicates Taungurung vision and aspirations in order to: • Assert the Taungurung people's rights as Traditional Owners • Educate and guide decision-makers about Taungurung country • Strengthen country, culture and people, including language • Recognise shared interests and opportunities to work together
Identified priorities	The plan outlines six key areas for action, which are not exclusive but express current priorities: • Identity, recognition and rights • Health and wellbeing, connection to spiritual, cultural and physical emotional and economic strength • Cultural heritage • Tangerang traditional knowledge • Caring for our country, climate change strategies, parks management • Economic independence with focus on ecotourism, fine management, pest control, traditional food and plants, agritourism, cultural tourism, agribusiness
Influence on the REDS strategic directions	Transport and logistics
	✔ Visitor economy
	✔ Manufacturing
	Resources
	✔ Health and social services

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