

Barwon

**Regional Economic
Development Strategy**

SUPPORTING ANALYSIS



Acknowledgement of Country

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

We acknowledge that the Barwon Regional Partnership region is on traditional lands, including those lands of the Wadawurrung people and Eastern Maar Nations, as well as other Traditional Owner groups in Victoria who are not formally recognised.

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

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01 Economic Insights

1.1 Business and Industry Analysis

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

- Traditional reliance on Manufacturing as the pillar of regional economic activity has ceded ground to growing Construction, Health Care and Social Assistance, Education and Training, and Financial and Insurance Services sectors. The increasing importance of these industries reflects the changing nature of the local economies.
- When considering both employment and output, the region is specialised (or concentrated) in Retail Trade and Public Administration and Safety industries. In terms of output alone, it is also strong in Construction, Manufacturing, Retail Trade and Education and Training.
- Across the region, 11 (of 19) sectors have outperformed the average growth rate across the state. This suggests there are a significant number of local factors contributing towards Barwon's impressive economic growth.

The region's international export value has consistently increased over the past decade and now totals \$1.83 billion. Tourism has also realised strong growth, with most visits coming from domestic tourists.

- Barwon is well connected with air and seaports via Geelong Port, Avalon Airport and its proximity to Melbourne. Strong freight connections have enabled the region to achieve strong export growth, particularly in agricultural goods.
- Home to a stretch of beach towns and the state's largest regional city, tourism is a significant contributor to the region's economy, particularly for the Surf Coast Shire LGA.

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

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



LQ Analysis, Employment

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

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

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

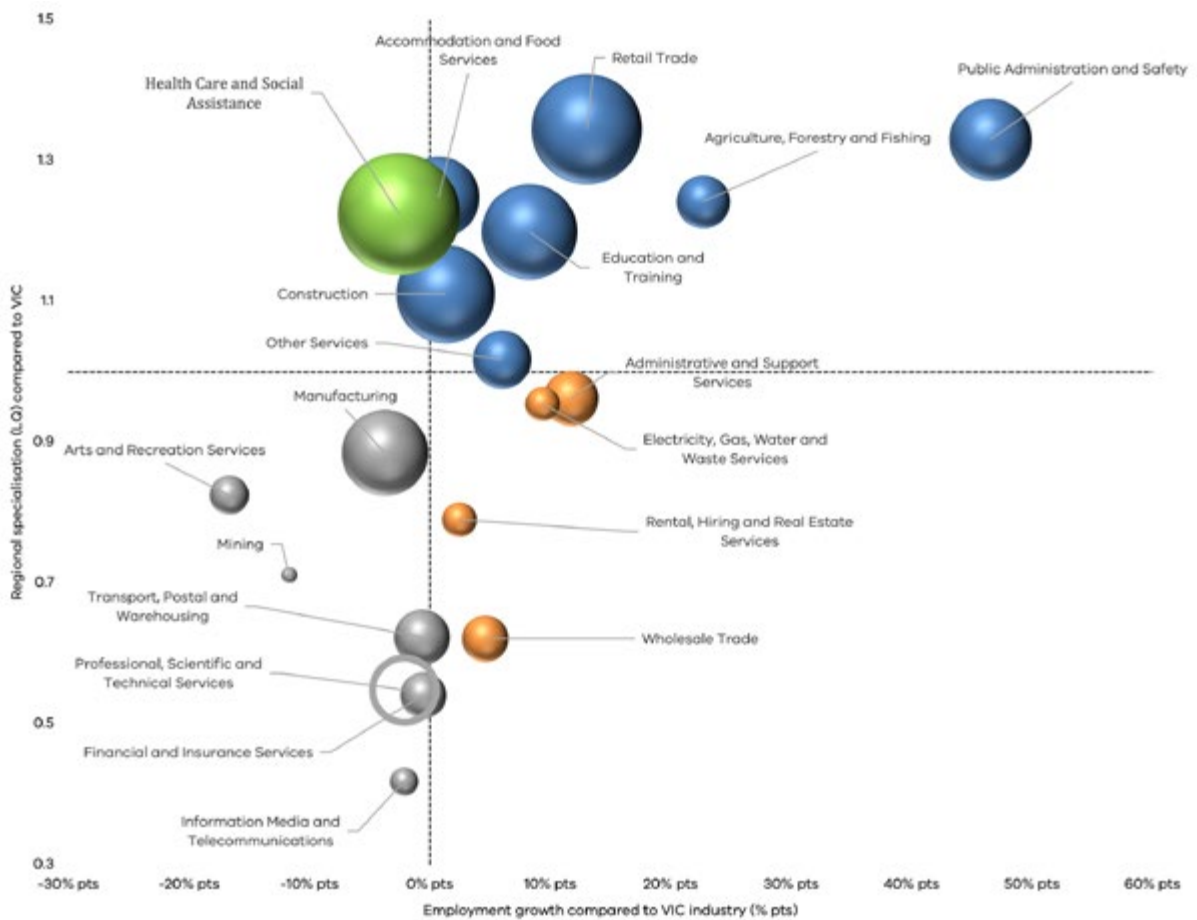
1. The Location Quotient tells us how regions compare to that of the broader economy in terms of size. Where there is variation in size relative to the broader economy, LQ can be an indicator of strength and ‘importance’ to the future of the economy. However, it is only one indicator and further analysis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

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

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

Figure 1.1.1: Location Quotient (Employment)

- Retail Trade scores explained:
- LQ score of 1.34 indicates that the industry is 1.34 times larger, as a share of total employment, than the state average
 - Employment growth compared to Victoria of 13.0% shows that the industry has grown 13.0% pts faster than the industry's state average



(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 Retail Trade and Public Administration and Safety. These industries represent over 20 per cent of the region’s employment, with retail contributing the largest stake at 13 per cent.

Among subindustries, Motor Vehicle and Motor Vehicle Parts Retailing, Residential Care Services, Accommodation, Public Administration, Building Cleaning, Pest Control and Other Support Services, Other Store-Based Retailing, Preschool and School Education, Social Assistance Services and Hospitals all employ at least 1% of workers and are specialised subindustries within the region.



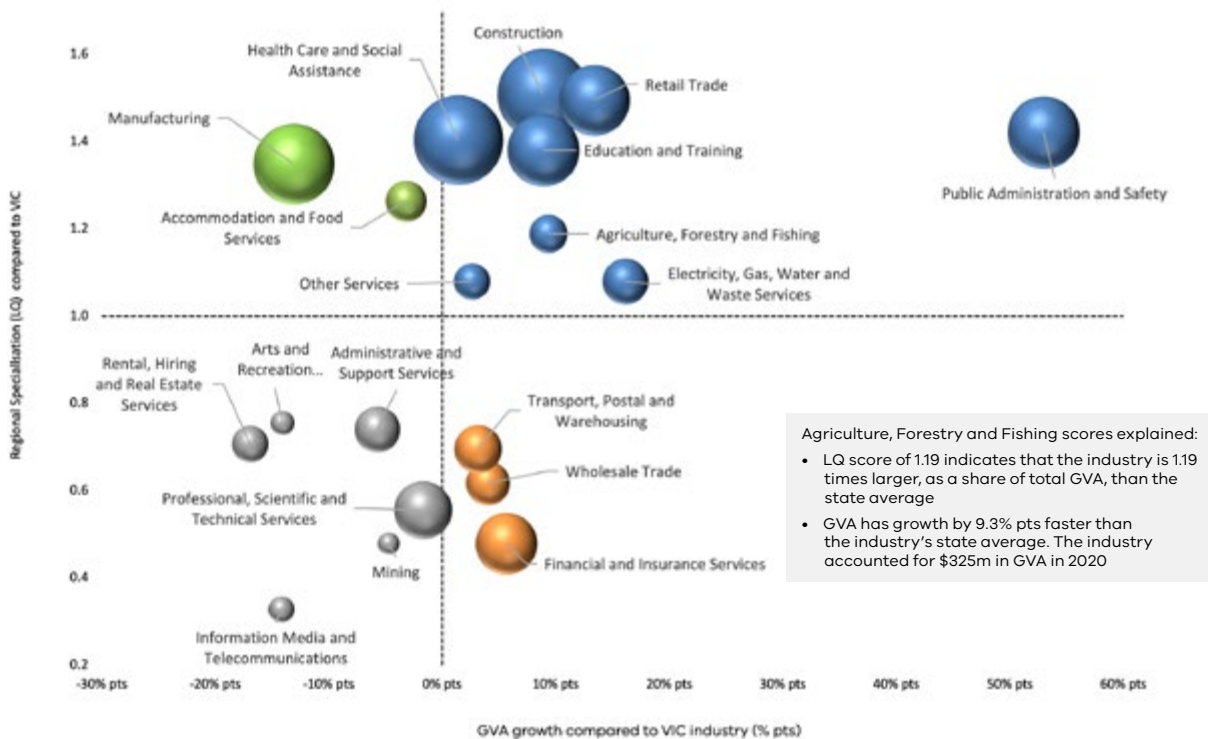
Over the past five years, the region has seen employment growth outpace the state average in eleven (of 19) sectors. Of these, Public Administration, and Safety (+46.5% pts) and Agriculture, Forestry and Fishing (+22.7% pts) recorded the strongest growth relative to the state. Among industries which lagged average employment growth for the state, several industries have LQ scores between 1.00 and 1.25. While these industries are slightly more concentrated than the state average, the difference is not sufficiently great to be defined as a regional specialisation. Above average employment concentration was particularly evident in services-based industries which are driven by population growth, such as Education and Training and Health Care and Social Assistance. There is also specialisation in Agriculture, Forestry and Fishing.

When metropolitan Melbourne is excluded, and Barwon compared with the rest of regional Victoria, the region demonstrates employment specialisations in Financial and Insurance Services, professional, Scientific, and Technical Services and Administrative and Support Services Sectors. Equally, compared with regional Victoria, the region does not exhibit a specialisation in Agriculture, Forestry and Fishing. As governments and local leaders plan for the region's future economic direction, it is important to consider Barwon's position both within regional Victoria and the state.

LQ analysis, GVA

Figure 11.2 (below) identifies Barwon's economic output specialisations in terms of Gross Value Added (GVA). Using the same approach as above, this analysis compares industries' size and growth as a proportion of total economic output relative to Victorian averages. While the employment LQ captures the industry concentration of the regional workforce, it does not capture the economic contribution of employment in terms of output. The GVA LQ analysis provides this insight. The position on the vertical axis indicates the industry's degree of GVA specialisation relative to the Victorian economy. For example, a value of 2.0 means that, as a share of the total output in the local economy, the industry is two times larger than the Victorian average⁴. The position on the horizontal axis indicates the difference in each industries' GVA growth (2015 to 2020⁵) between the region and the Victorian average, the size of each bubble indicates the share of the regions GVA produced by the industry.

Figure 1.1.2: Location Quotient (GVA)



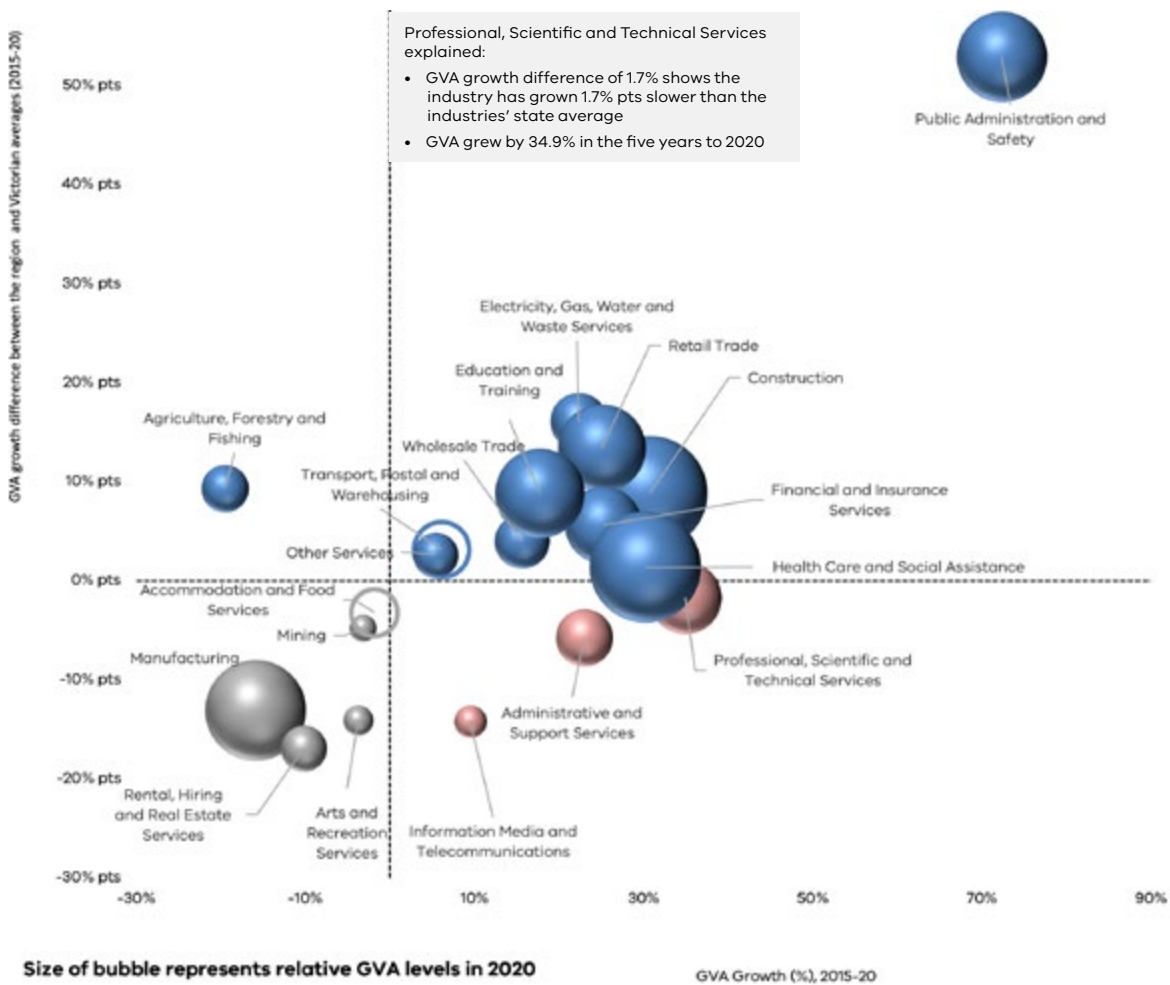
Shift-Share Analysis

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

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

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

Figure 1.1.3: Shift Share Analysis



(NIEIR, 2020) 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.

The position on the vertical axis indicates the difference in each industry's average GVA growth (2015-20) between the region and the Victorian average. The position on the horizontal axis indicates the amount each industry in the region has grown or declined between 2015 and 2020. The size of each bubble indicates the amount of output produced in the industry.

Relative to the Victorian average, 11 (of 19) industries outperformed the average growth across the state, led by public administration and safety (+53.0% pts), Electricity, Gas, Water and Waste Services (+16.1% pts) and Retail Trade (+16.1% pts). Furthermore, 13 sectors saw overall GVA growth between 2015 and 2020.

Of the sectors not to record positive GVA growth (such as Agriculture Forestry and Fishing and Manufacturing), Agriculture, Forestry and Fishing outperformed the sector's average performance across the state. This indicates that the Agriculture, Forestry and Fishing sector faced challenging conditions across the state in recent years and that Barwon recorded strong results relative to other regions.

The region exhibits further strengths among its subindustries. Over the past five years, Agriculture, Fabricated Metal Product Manufacturing, Electricity Supply Water Supply, Sewerage and Drainage Services, Building Construction, Heavy and Civil Engineering Construction, Construction Services, Motor Vehicle and Motor Vehicle Parts Retailing, Food Retailing, Other Store-Based Retailing, Finance, Public Administration, Public Order, Safety and Regulatory Services, Preschool and School Education, Residential Care Services, Social Assistance Services and Personal and Other Service all outperformed the state's average growth rate.

Strong results across a diverse range of sectors indicates the comparative strength of the Barwon region. Consistently outperforming state averages demonstrates that there are many regional characteristics that contribute to the region's success. These should therefore 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.⁶

In Table 1.1.4 on the following page, 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.

6. 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)	Clusters
Agriculture, Forestry and Fishing	1.24	1.15	x
Mining	0.71	0.96	x
Manufacturing	0.88	1.05	x
Electricity, Gas, Water and Waste Services	0.95	1.13	x
Construction	1.11	1.25	?
Wholesale Trade	0.62	0.65	x
Retail Trade	1.35	1.08	?
Accommodation and Food Services	1.25	1.20	?
Transport, Postal and Warehousing	0.62	0.74	x
Information Media and Telecommunications	0.42	0.65	x
Financial and Insurance Services	0.54	0.91	x
Rental, Hiring and Real Estate Services	0.79	0.92	x
Professional, Scientific and Technical Services	0.55	0.84	x
Administrative and Support Services	0.96	0.83	x
Public Administration and Safety	1.33	0.90	?
Education and Training	1.20	0.93	x
Health Care and Social Assistance	1.22	1.23	x
Arts and Recreation Services	0.83	1.16	x
Other Services	1.02	1.07	x

(ABS, 2021) (NIEIR, 2020)

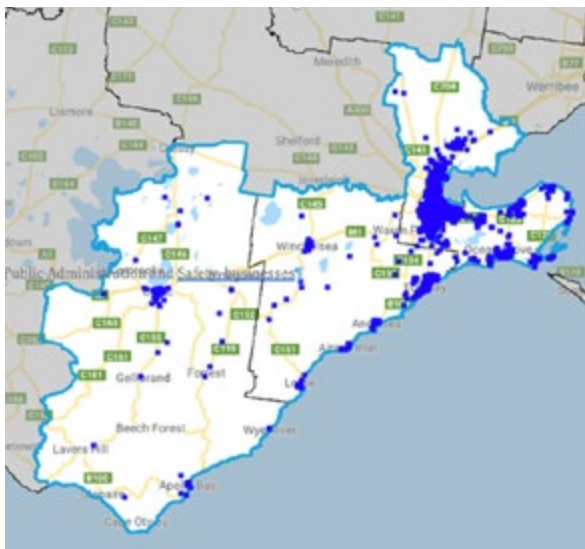
The results indicate that the region has no clear business clusters, however Retail Trade, Accommodation and Food Services and Public Administration and Safety performed strongly in employment clusters, and Construction in business clusters.

While the strong economic diversity, centred around the City of Greater Geelong, contributes to the lack of clusters, several sectors are close to meeting the threshold. Construction, Agriculture, Forestry and Fishing, Accommodation and Food Services and Healthcare and Social Assistance all narrowly missed out being defined as a cluster.

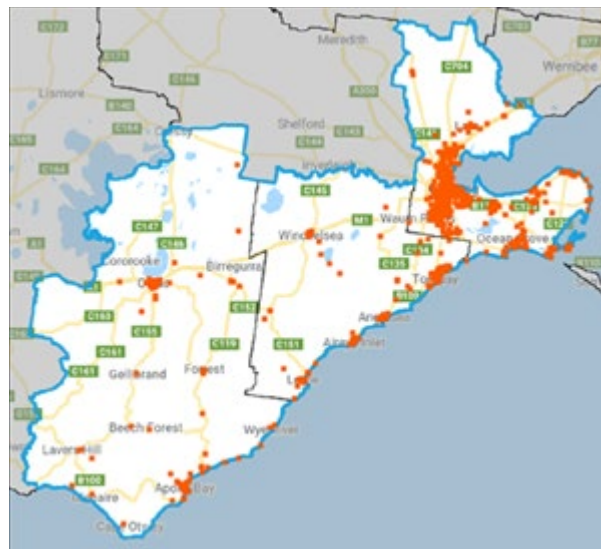
It is important to note that, while the data does not highlight any clusters, they may still be present. By considering the benefits of clustering at a more granular level i.e. subindustry or defined geography, there remains significant scope to explore how clusters may support economic opportunities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

Figure 1.1.5: Employment cluster mapping

Retail Trade businesses



Accommodation and Food Services businesses



Public Administration and Safety businesses



(REMPAN, 2021)

Gross Value Add

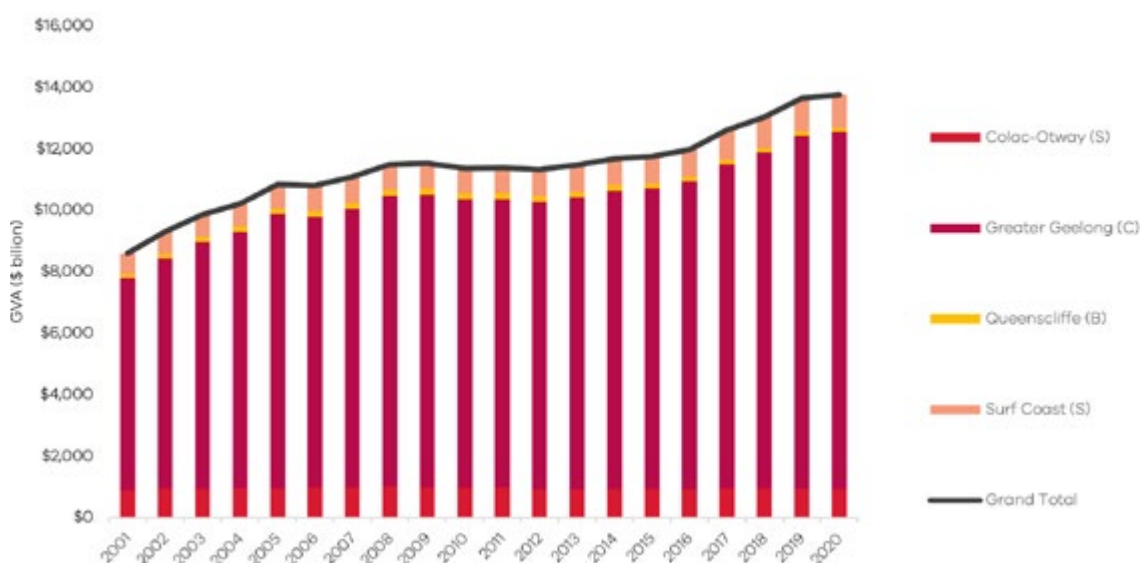
Since the turn of the century, Barwon has realised strong growth in Gross Value Add (GVA); the region's total GVA rose from \$8.6 billion to \$13.8 billion between FY2001 and FY2020 (see Figure 1.1.6).

There have been two periods of significant growth; FY2001 to FY2005 (growing \$1 billion) and FY2015 to FY2020 (growing \$1.8 billion).

Supported by its growing population, Greater Geelong is the largest economy in the region and has driven a significant proportion of the region's growth. Colac Otway, Surf Coast and Queenscliff have also experienced growth over the same period.

Population growth in the region has increased output across a range of sectors, including Health Care and Social Services, Construction, Education and Training, Retail, Financial and Professional Services. This growth has diversified the local economy and offset a decline in Manufacturing, driven by falls in petroleum and Coal Product Manufacturing.

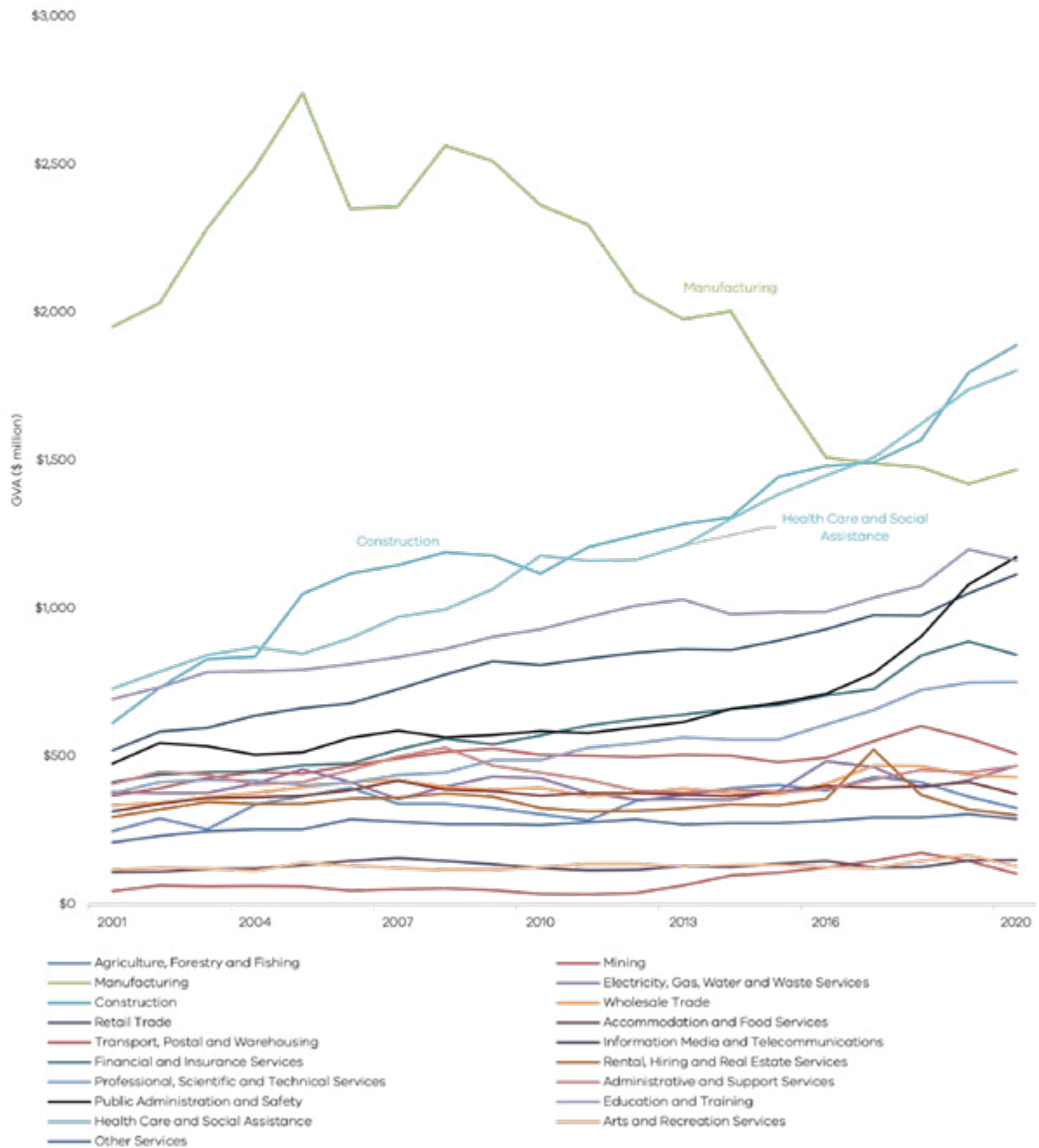
Figure 1.1.6: GVA over time by LGA



(NIEIR, 2020)

Health Care and Construction have grown significantly over the past decade, making them the largest and second largest contributors to Barwon's GVA respectively. Despite declines over the past decade, Manufacturing remains the third largest contributor to Barwon's GVA (see Figure 1.1.7). Other industries servicing the growing population has experienced notable growth over the past two decades. Education and Training, Public Administration, and Retail Trade are now respectively the fourth, fifth and sixth largest sectors in the region.

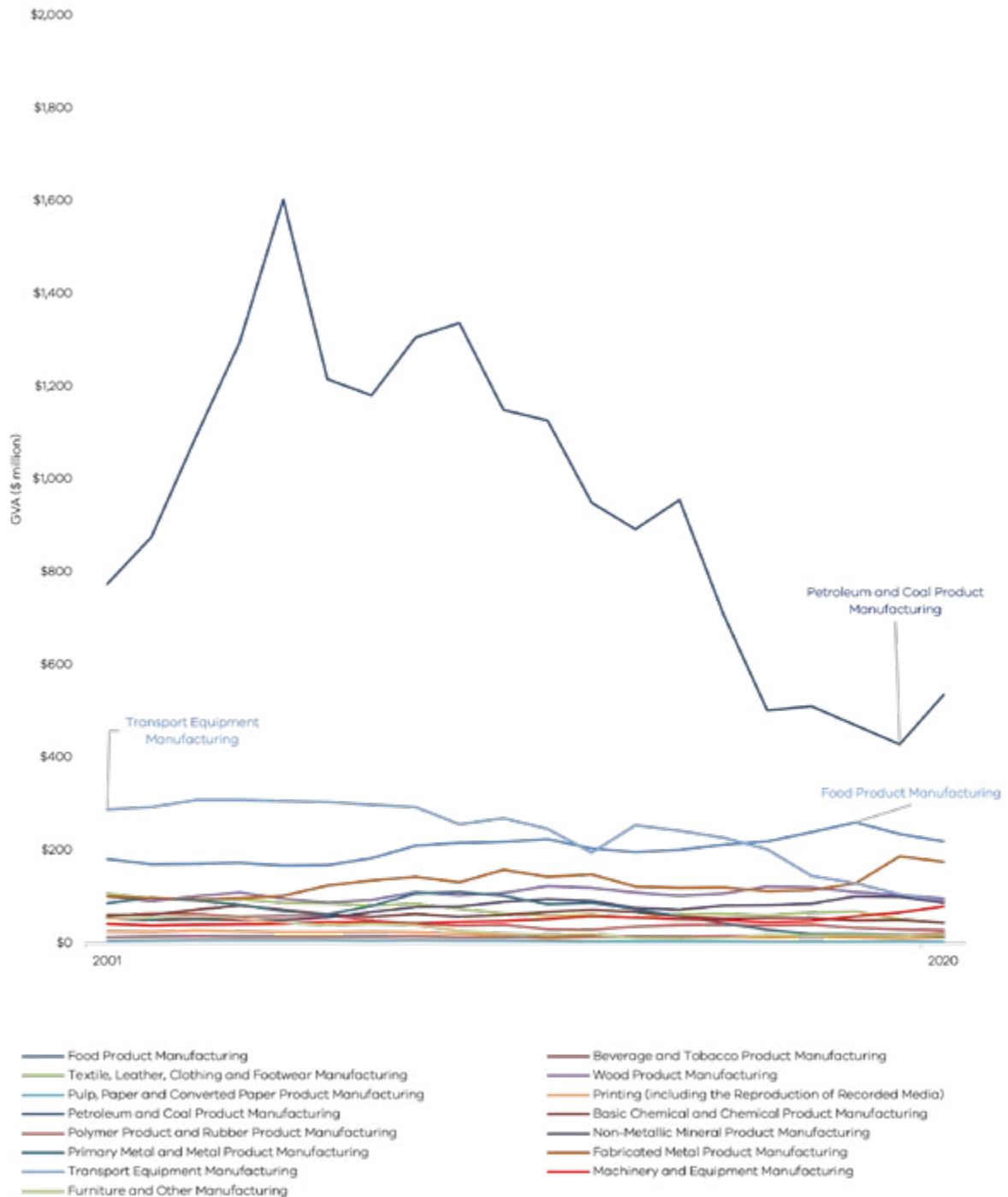
Figure 1.1.7: GVA by industry



(NIEIR, 2020)

At a subindustry level, falls in Manufacturing GVA have been driven by declines in Petroleum and Coal Product Manufacturing, which has decreased since its peak in 2005 (see Figure 1.1.8).

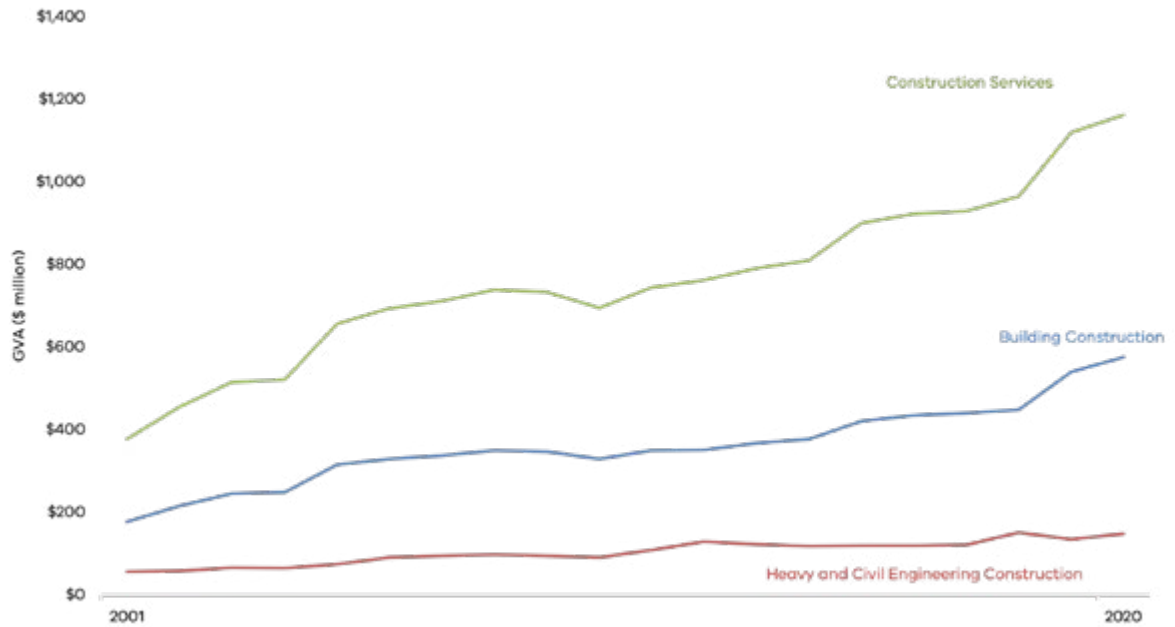
Figure 1.1.8: Manufacturing GVA



(NIEIR, 2020)

Construction Services and Building Construction are the largest contributors to the construction industry's GVA. These subindustries realised steady growth between FY2001 and FY2005 and since FY2010 (see Figure 1.1.9).

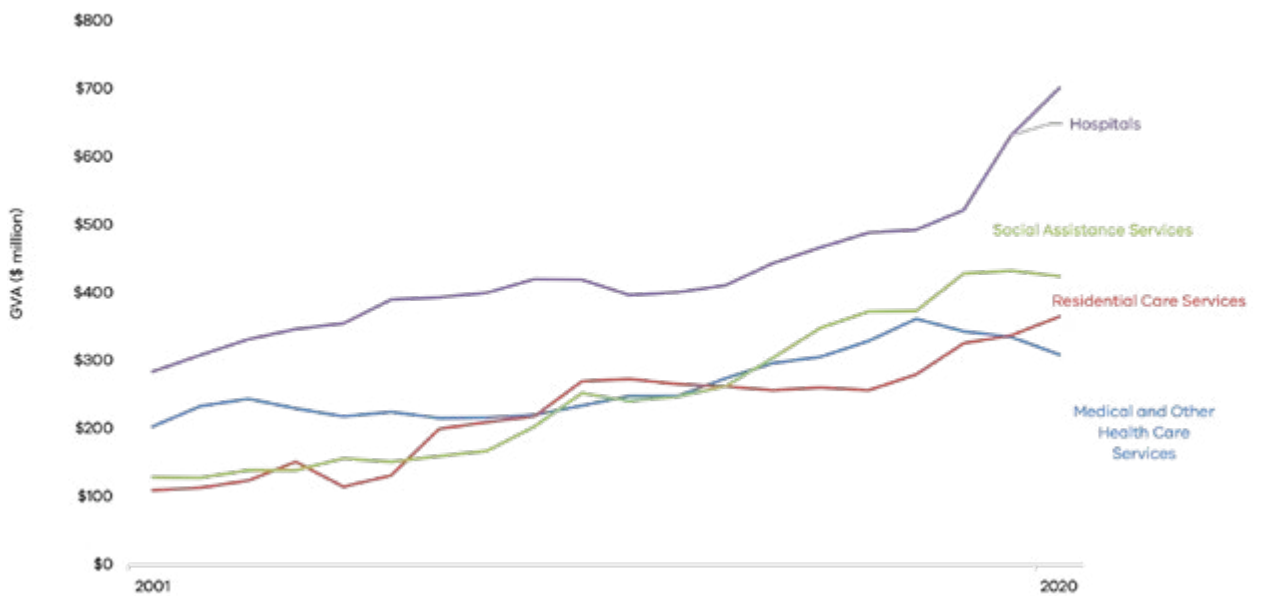
Figure 1.1.9: Construction GVA



(NIEIR, 2020)

Consistent with trends across the state, all Health Care and Social Assistance subindustries have realised strong growth since 2001, partially explained by population and demographic changes. There have been substantial increases in Hospitals GVA in recent years (see Figure 1.1.10).

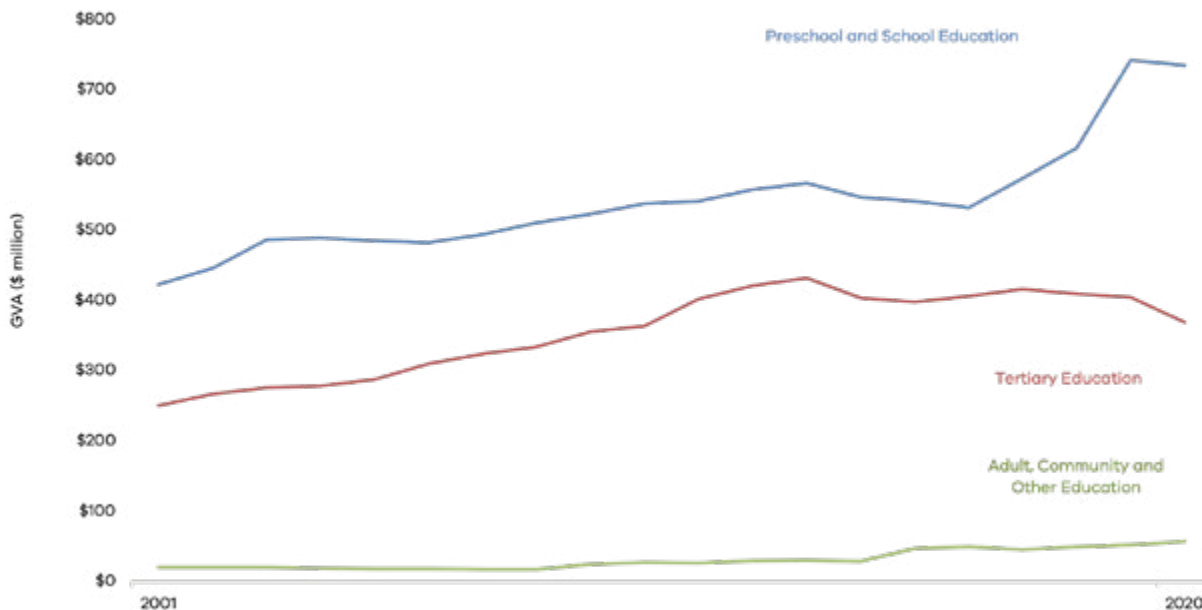
Figure 1.1.10: Health Care and Social Assistance (GVA)



(NIEIR, 2020)

Growth in the Education and Training Services industry has been driven by strong Preschool and School Education growth in the region since FY2016. Tertiary Education has been declining since FY2013. These sectors are heavily concentrated in Geelong, which has established itself as a strong regional education hub (see Figure 1.1.11).

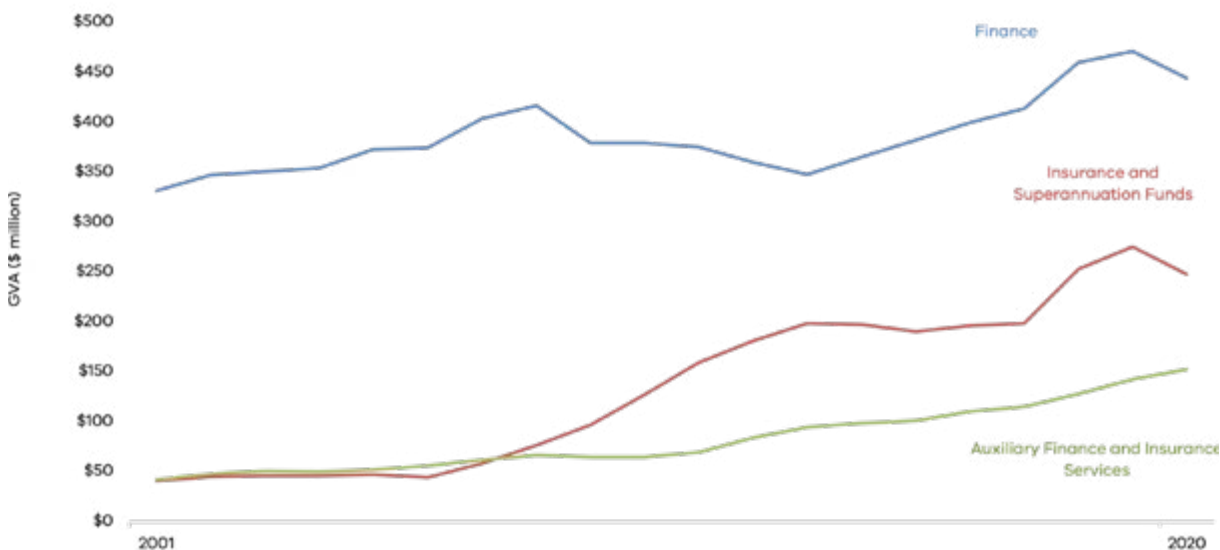
Figure 1.1.11: Education and training services (GVA)



(NIEIR, 2020)

The Finance and Insurance Services industry has realised strong growth between 2001 and 2019, particularly in Insurance and Superannuation Funds (see Figure 1.1.12). A contraction in Finance and in Insurance and Superannuation Funds subindustry in 2020 could be an implication of the COVID-19 pandemic. Auxiliary Finance and Insurance Services has been growing steadily since 2001.

Figure 1.1.12: Financial and Insurance Services (GVA)



(NIEIR, 2020)

Business growth

Over the past five years, more than 7,400 new businesses have established themselves in the Barwon region, mostly concentrated around Geelong. By industry, the highest proportion are in Construction (20 per cent or 1,612 businesses) and Transport, Postal and Warehousing (14 per cent or 1,093 businesses). At a subindustry level, 45 per cent (or 725 businesses) of the new Construction businesses are in Housing Construction, Carpentry, Electrical and Plumbing Services. New businesses in these industries are likely to reflect the region’s population growth and, as it relates to transport, Geelong’s consolidating importance as a hub for moving goods, services, and people.

Other industries of significant business growth are:

- Professional, Scientific and Technical Services (865 new businesses),
- Health Care and Social Assistance (539 new businesses),
- Retail Trade (473 new businesses), and
- Administrative and Support Services (403 new businesses).

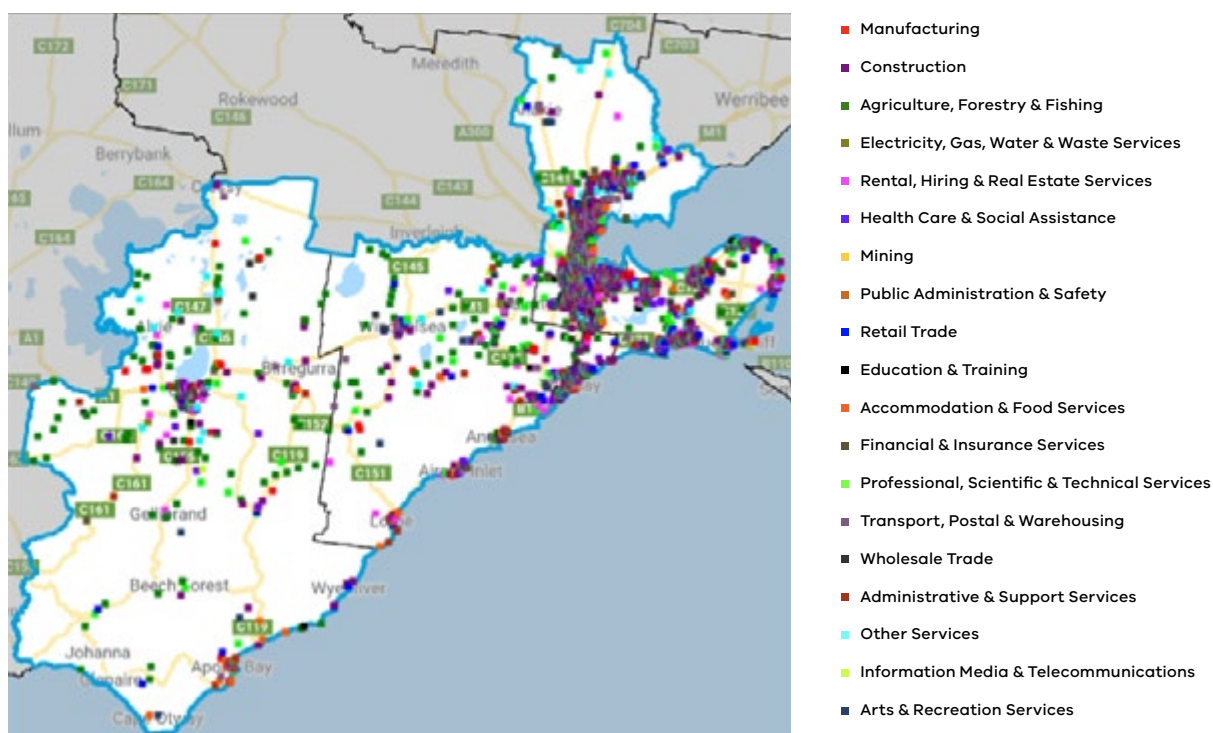
Among subindustries, significant business growth has occurred among:

- Taxi Drivers (358 new businesses),
- Management Advice and Related Consulting Services (289 new businesses),
- Cafés and Restaurants (194 new businesses), and
- Road Freight Transport (185 new businesses).

Many of these areas reflect population growth and Geelong’s emergence as a tertiary economy. However, this emergence also reflects the growing ‘gig economy’ in retail, hospitality, and passenger vehicle services.

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

Figure 1.1.13: Business Entries (September 2015 to September 2020)



Source: (REMPAN, 2021)

International Exports⁷

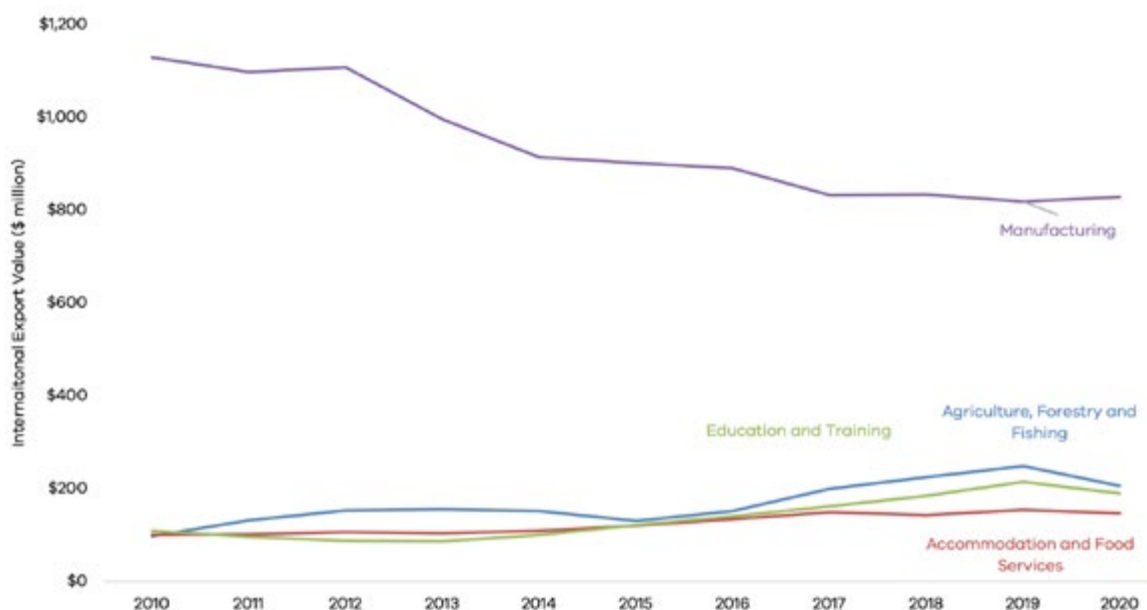
Barwon is home to significant enabling infrastructure which provides the region’s producers with access to international markets. Geelong Port is Victoria’s second largest sea freight location, receiving over 600 vessel visits and handling 12 million tonnes of cargo worth \$7 billion every year, and the region’s Avalon Airport opened a new international terminal in 2018 to service AirAsia flights. International export value from the region has slowly increased over the past decade from \$1.77 billion in 2010 to \$1.83 billion in 2020.

Exports are driven by Manufacturing products however the sector’s value and significance has been steadily falling (see Figure 1.1.14). In 2010, \$1.1 billion in Manufacturing product was sent to international markets, representing 63.8 per cent of Barwon’s total export value. In 2020, the industry’s international value has fallen to \$830 million, 45.4 per cent of total regional export value. This result reflects wider trends of overall declines in production value across the industry. These declines are concentrated in Petroleum and Coal Product, Primary Metal and Metal Product, Transport Equipment Manufacturing, and Textile, Leather, Clothing and Footwear Manufacturing subindustries. The losses have been partly offset by gains in other manufacturing sub-sectors, most notably Food Product Manufacturing. Food Product Manufacturing has realised strong export value growth, reaching \$252.4 million in 2020, up from \$161.1 million in 2010. The region hosts major food processing activity in Geelong and Colac.

Beyond Manufacturing, the region is realising steady international export value growth across industries, particularly from Agriculture, Forestry and Fishing, Education and Training, and Accommodation and Food Services. Despite the impact of international border closures, the three sectors generated \$544.5 million in export value in 2020 (29.8 per cent of total value).

Dairy is the region’s most valuable agricultural export, followed by beef. Led by Japan, China and Indonesia, Asian markets account for over 80 per cent of Victoria’s dairy exports, while the United States leads China and Japan as most significant beef markets. Meanwhile, Education and Training export values have been driven by tertiary education. Growing international student numbers at Deakin University’s two Geelong campuses over the past five years have resulted in significant export value growth; from \$97.7 million in 2010 to \$206.3 million in 2020, down from \$249.4 million in 2019. Over the same period, Accommodation and Food Services have realised steady growth, largely due to Geelong, the Bellarine Peninsula and the Surf Coast’s emergence as popular international tourist destinations.

Figure 1.1.14: International Export Value, Key Industries



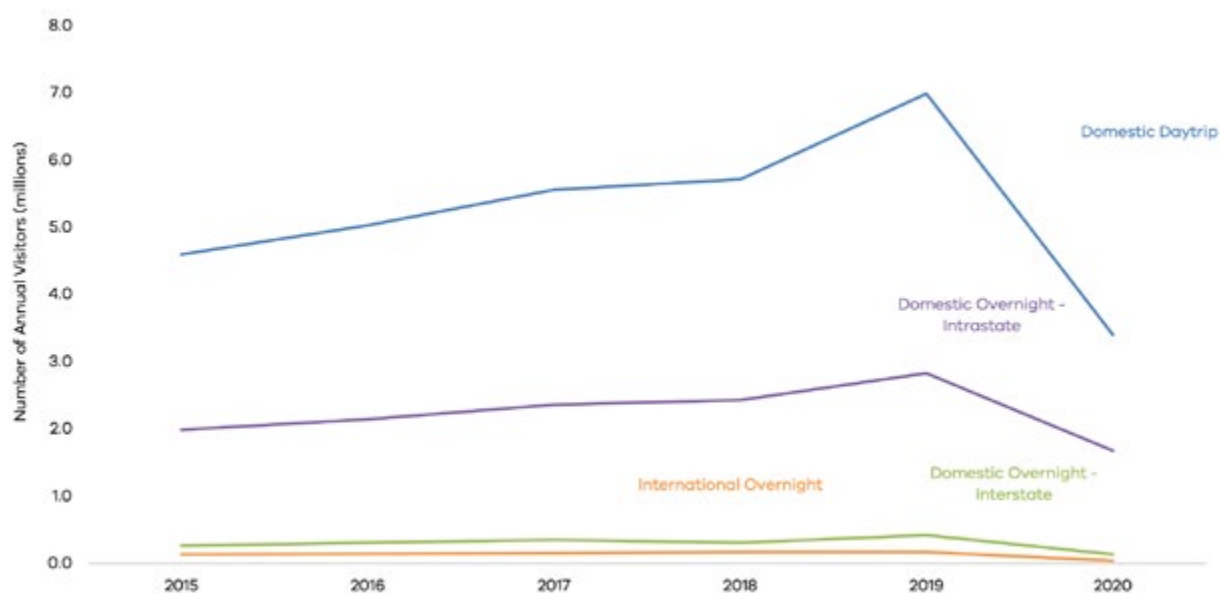
Sources: (NIEIR, 2020)

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

Visitor Economy

Home to a stretch of coastal towns offering idyllic beach holiday locations as well as recreational and historical sites throughout the state's largest regional city, tourism is a significant contributor to the region's economy, particularly for Surf Coast and Queenscliffe LGAs. Prior to COVID-19, visitor numbers and expenditure were growing year-on-year (see Figure 1.1.15). Domestic daytrips visitors have been the most common category of visitation, followed by domestic intrastate overnight visitors. However, restrictions associated with the pandemic including international and state border closures, stay-at-home orders and density limits have significantly impacted the region's visitor economy. The total number of domestic daytrip, and domestic and international overnight visitors fell from 10.4 million in 2019 to 5.3 million in 2020. This decline led to a fall in total visitor expenditure from \$2.0 billion in 2019 to \$1.1 billion 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 1.1.15: Visitation Overview (2015 – 2020)⁸



Source: (Tourism Research Australia, 2021a)

While border closures have resulted in substantial falls in the number of international and domestic interstate overnight visitors (75.9 per cent and 67.7 per cent respectively), declines in domestic day-trippers (51.3 per cent) and domestic intrastate overnight visitors (40.7 per cent) are also high. Due to its proximity to metropolitan Melbourne and popularity as a visitor location, the region has disproportionately realised the negative impacts of restrictions on movement between Victoria's regional and metropolitan areas.

As Australia's vaccine rollout progresses and international travel remains limited, the region has the opportunity to capture tourism demand from those seeking to substitute overseas holidays. To some extent, the region is already realising these benefits; average visitor spend is substantially higher in 2020 than 2019 among domestic intrastate overnight tourists, partly due to the increase in stay lengths. Since the region is proximate to metropolitan Melbourne and is home to the largest airport in regional Victoria, it is well positioned to attract higher spending and longer staying overnight visitors.

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

Table 1.1.16: Visitation & Average Spend (2019 – 2020)⁹

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
Domestic Daytrip	7,002,000	3,409,000	\$93	\$89
Domestic Intrastate Overnight	2,839,000	1,683,000	\$356	\$421
Domestic Interstate Overnight	426,000	138,000	\$504	\$492
International Overnight	179,000	43,000	\$787	\$561

Source: (Tourism Research Australia, 2021a)

Beyond the four major categories of visitation, the region also previously received substantial international day-trippers to the Great Ocean Road, and Geelong and the Bellarine Peninsula. An estimated 801,600 international day-trippers visited the Great Ocean Road in 2019 and 204,600 visited Geelong and the Bellarine Peninsula. With only 243,200 and 62,900 international tourists to each of the destinations staying a night, day-tripping has been the more popular form of visitation. Total international visitation to the Great Ocean Road fell to 195,500 visitors in 2020 and only 65,000 visited Geelong and the Bellarine. It is unlikely that these types of visitors are going to return in the short- to medium-term. To replace the international visitation shortfall, efforts are required to encourage first-time domestic tourists and/or create incentives for past tourists to return.

Most businesses which service visitors are small enterprises. In 2019, there was 3,390 tourism businesses across the region, largely concentrated in the Greater Geelong LGA. Of these, 73.7 per cent have four employees or fewer, with 41.4 per cent sole proprietors. Just 5.5 per cent of businesses have 20 or more employees.

Table 1.1.17: Average Number of Tourism Businesses (2016 – 2019)

Local Government Area	Tourism Businesses
Colac Otway	321
Greater Geelong	2,494
Queenscliffe	87
Surf Coast	488
Total	3,390

Source: (Tourism Research Australia, 2020)

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



1.2 Demographic Profile

Over the past 20 years, Barwon has experienced strong population growth. Notwithstanding the impacts of COVID-19, this trend is expected to continue.

- Between 2019 and 2020, the most important contributor towards the region's population growth was the inflow of domestic migrants.
- Regional growth has been driven by Greater Geelong and, to a lesser extent, the Surf Coast Shire. This trend reflects the growing liveability appeal of regional cities and coastal areas for those seeking a sea change. Colac Otway and Queenscliffe have stable populations.
- 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.

Contrary to regional Victorian trends, population growth from domestic migrants is strong across age-groups however, there are significant intra-regional discrepancies.

- Surf Coast and Queenscliffe are particularly attractive options for older cohorts seeking to retire by the seaside but remain close to amenities in Geelong and Melbourne.
- Reflecting its various educational and employment opportunities and urban appeal, Geelong is realising growth across all age cohorts while Colac Otway is experiencing an outflow of young people.

Population and population growth

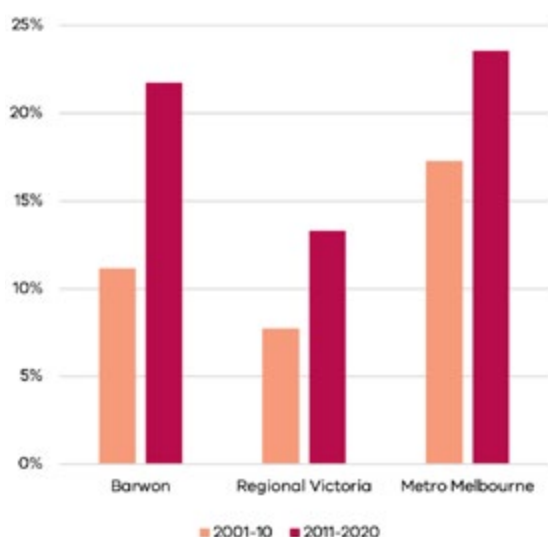
In 2020, Barwon was home to an estimated resident population of 324,307 people. 264,866 (82 per cent) of these lived in Greater Geelong, 34,771 (11 per cent) in Surf Coast Shire, 21,662 (7 per cent) in Colac Otway Shire and 3,008 (1 per cent) in the Borough of Queenscliffe.

Barwon’s population increased by 11.2 per cent between 2001 and 2010 and by 21.8 per cent between 2011 and 2020. While growth has been less than metropolitan Melbourne over the same periods, these rates outpace the average rates across regional Victoria (see Figure 1.2.1).

Barwon’s population was forecast to continue to grow more rapidly than the average rate across regional Victoria however, the impacts of COVID-19 on domestic and international migration are likely to alter previous forecasts (see Figure 1.2.2).

As the major socioeconomic centre, population growth has been driven by strong growth in Greater Geelong. There has also been steady growth in Surf Coast Shire. Meanwhile, Colac Otway and Queenscliffe have experienced limited growth which was forecast to continue prior to COVID-19 (see Figure 1.2.3).

Figure 1.2.1: Population Growth



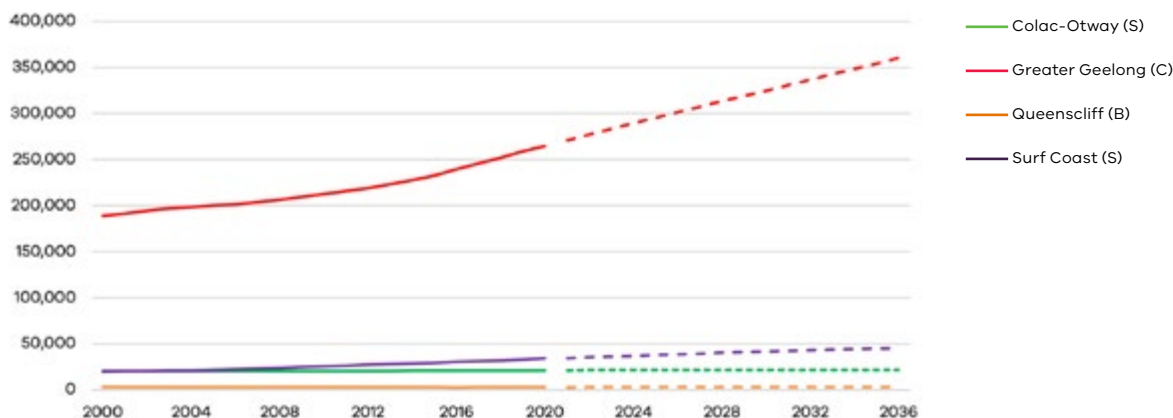
Source: (Australian Bureau of Statistics (ABS), 2020a)

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)



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

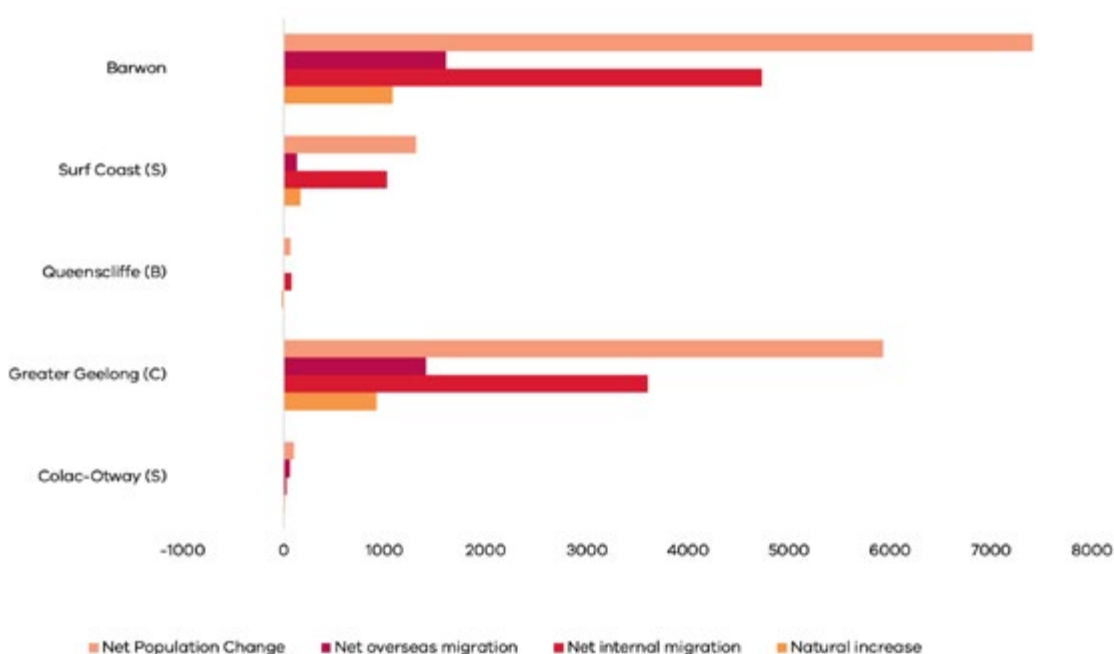
Components of population change

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

Population growth in Greater Geelong and Surf Coast has been driven by Australian residents moving into the area (NIM). Geelong has also seen gains from overseas migrants (NOM) and natural increases. In contrast, Colac Otway and Queenscliffe exhibited no significant population change over the time period.

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

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



Source: (ABS, 2021)

Regional internal migration

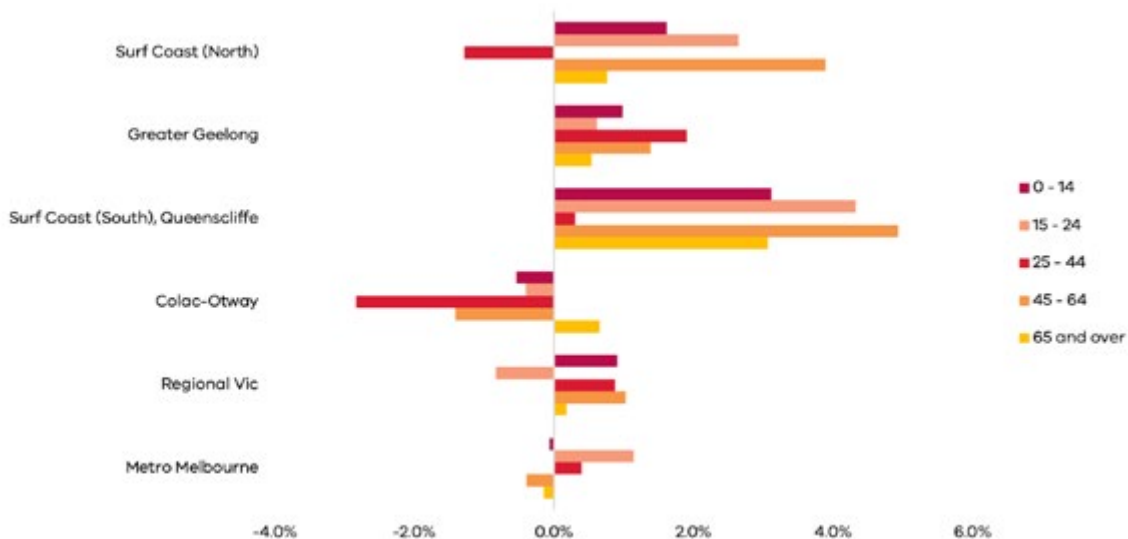
Net internal migration by age data indicates the significant differences between areas and cohorts in the region (see Figure 1.2.5).

Greater Geelong is attracting inward migration across all age groups. This result is likely to be supported by its strong tertiary education system and a diversified economy. This provides young people with more opportunities than many other regional communities. It also offers quality amenities for raising a family and opportunities for mature workers to progress their career.

Surf Coast (North), Surf Coast (South) and Queenscliffe have experienced net internal migration across all age cohorts, with the exception of those aged 25 to 44 years in the case of Surf Coast (North). Growth, particularly in Surf Coast (South) and Queenscliffe, reflects the liveability of these localities and their popularity as retirement options for those who are seeking a sea change but who wish to remain near amenities in Geelong and Melbourne.

Meanwhile, Colac Otway is experiencing declines across most age brackets, excluding the 65 years and over cohort. This is particularly evident for people aged between 25 and 44 years, who may be moving out of the locality to seek out greater education and employment opportunities.

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



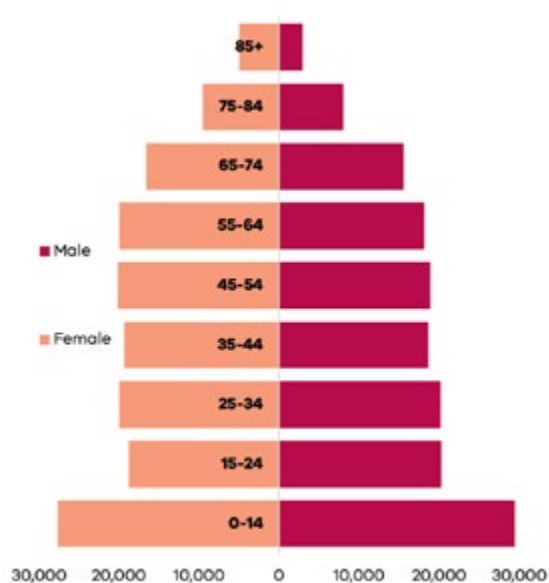
Source: (ABS, 2020b)

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. Surf Coast LGA is split into North and South. The South component includes all the coastal towns along the Great Ocean Road, while the north includes the section of the LGA serviced by the Princes Highway, including the towns of Moriac and Winchelsea.

Population cohort analysis

Barwon’s population is 50.8 per cent female and 49.2 per cent male. With a median age of 40 years, Barwon is one of the youngest Regional Partnership regions. The median age is younger than that of regional Victoria (42 years) but older than that of metropolitan Melbourne (36 years). The working aged population (15 to 64 years) comprise 62.8 per cent of the population and 18.8 per cent of the population are aged 65 years or older (see Figure 1.2.6).

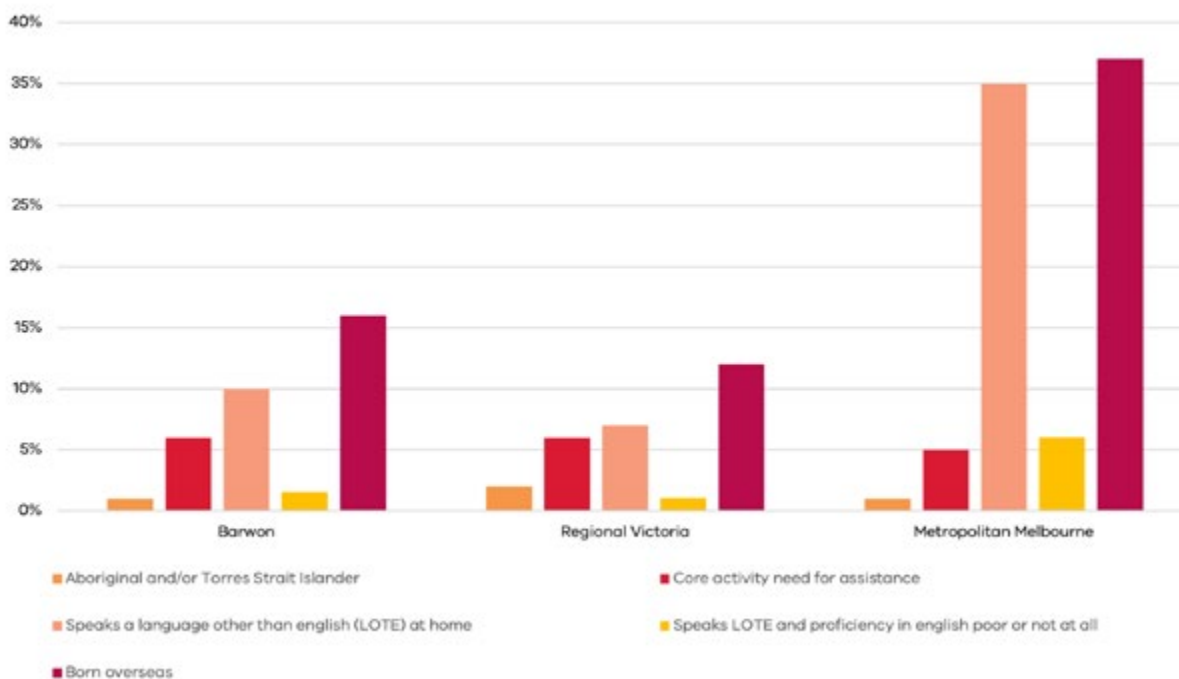
Figure 1.2.6: Population by Age



(ABS, 2020c)

1.0 per cent of the region’s population is Aboriginal and Torres Strait Islander while 6.2 per cent live with a disability. The former is half the regional Victorian average, and the latter is consistent with the regional rate. Barwon has a relatively high proportion of culturally and linguistically diverse (CALD) people; 10.0 per cent of the population speak a language other than English at home, 1.5 per cent speak a language other than English with poor to no proficiency in English, and 16.3 per cent are born overseas. All these measures exceed regional Victorian averages but are significantly lower than metropolitan Melbourne averages (see Figure 1.2.7).

Figure 1.2.7: Population Cohorts



Source: (ABS, 2016a)

1.3 Socio-economic Profile

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, Barwon tends to outperform regional Victorian averages.
- While Surf Coast, Queenscliffe and Greater Geelong LGAs are relatively well off, Colac Otway underperforms the region across all socio-economic measures.
- Relative to general population rates in Barwon, local Aboriginal and Torres Strait Islanders have poorer outcomes across labour force engagement and income measures.

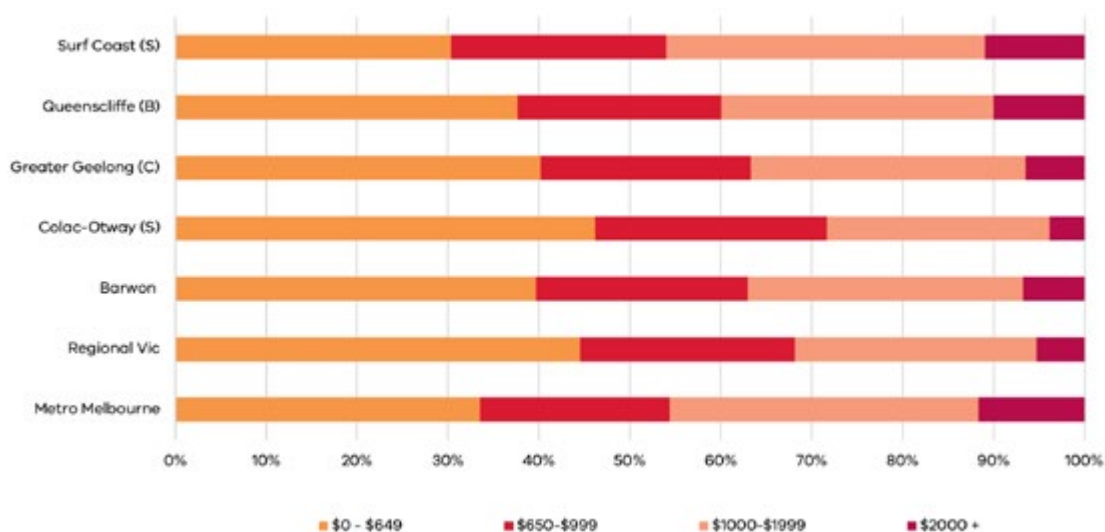
While the region performs strongly overall, there remains significant opportunities to improve educational attainment, engage disadvantaged cohorts and lift wages.

Income

Relative to the rest of regional Victoria, Barwon has high average household incomes however, the region underperforms metropolitan Melbourne. Seven per cent of households in the region earn over \$2,000 per week. This exceeds the regional average (five per cent) however lags the metropolitan Melbourne rate of 12 per cent. 40 per cent of households earn below \$650 per week, which is lower than the regional average (45 per cent) but higher than metropolitan Melbourne (34 per cent).

At an LGA level, Surf Coast and Queenscliffe LGAs have higher average household incomes; 46 per cent and 40 per cent of households respectively earn more than \$1,000 per week. This is significantly more than average across the Barwon region (34 per cent) and regional Victoria (32 per cent). Conversely, Colac-Otway has lower average household incomes; fewer than 30 per cent of households earn above \$1,000 per week while 46 per cent of households earn less than \$650 per week (see Figure 1.3.1).

Figure 1.3.1: Household Income Distribution (Weekly)



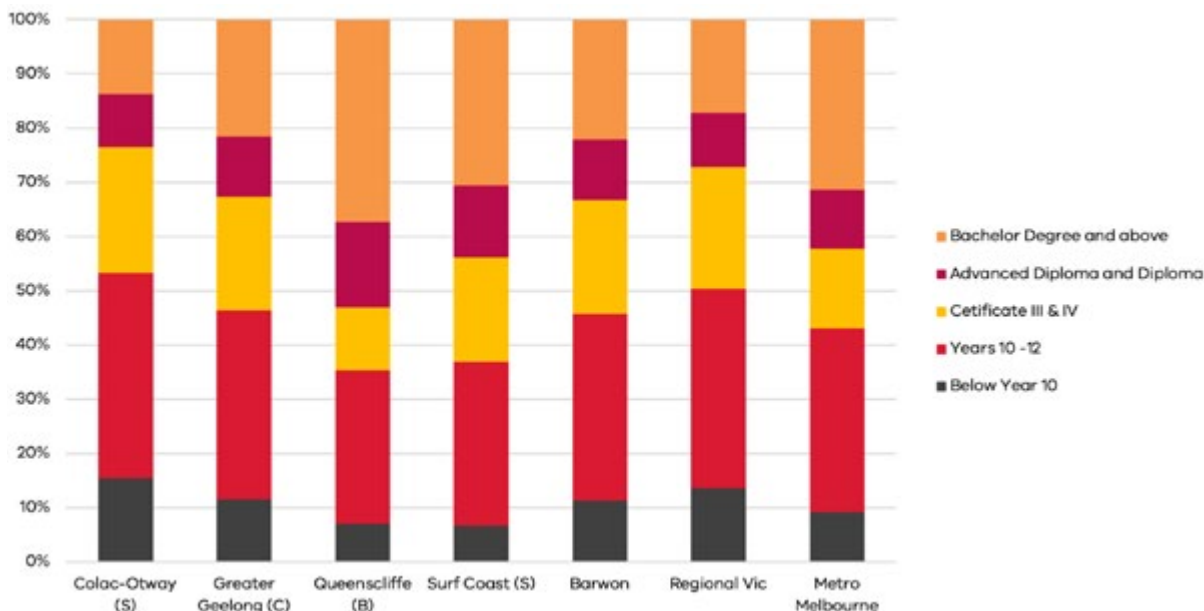
Source: (ABS, 2016b)



Education attainment

Broadly speaking, educational attainment in Barwon exceeds regional averages. There are fewer people who leave school early and more who have attained tertiary qualifications (see Figure 1.3.2). However, there are intra-regional differences. For example, with most people not having progressed beyond secondary school, Colac–Otway has considerably lower educational attainment levels than the rest of the region. Furthermore, Queenscliffe and Surf Coast have very high proportions of people with a bachelor’s degree or higher qualification (37 per cent and 31 per cent respectively). This is significantly higher than the 22 per cent average across Barwon, 17 per cent in regional Victoria, and 31 per cent in metropolitan Melbourne.

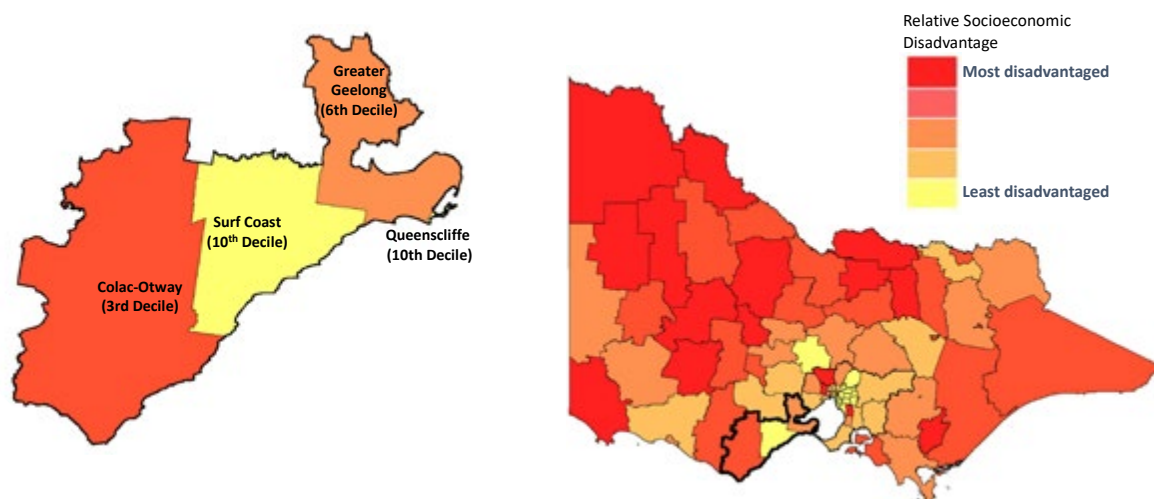
Figure 1.3.2: Educational Attainment (Highest Level)



Source: (ABS, 2016c)

Socio-economic Disadvantage

Map 1.3.3: Index of Relative Socio-economic Disadvantage (IRSD) Rankings (2016)



Source: (ABS, 2016d)

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

Levels of socio-economic disadvantage differ across Barwon. The Surf Coast and Queenscliffe are among the least disadvantaged LGAs in the state. Greater Geelong ranks at an average level while Colac Otway is among the most disadvantaged in the state; ranking 20th most disadvantaged out of 80 in 2016.

Between 2011 and 2016, Surf Coast, Greater Geelong and Queenscliffe realised improvements in their relative levels of disadvantage. In comparison, relative disadvantage in Colac Otway deteriorated. These rankings indicate the growing divide between the most and least disadvantaged parts of the Barwon region (see Table 1.3.4).

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

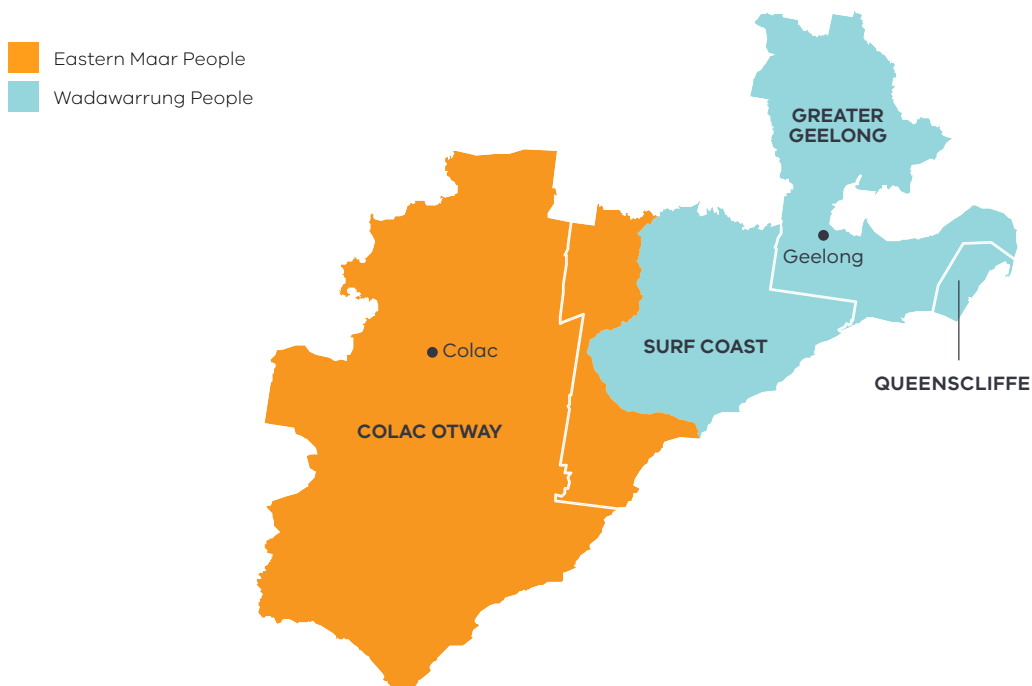
Local Government Area	2016 Rank (of 80)	2016 Decile	2011 Rank (of 80)	
Colac Otway (S)	20	3	21	▲
Greater Geelong (C)	41	6	40	▼
Queenscliffe (B)	75	10	71	▼
Surf Coast (S)	76	10	74	▼

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

Local Aboriginal Communities and Traditional Owners

Figure 1.3.5 illustrates the Traditional Owner groups present in the region.

Figure 1.3.5: Traditional Owner Groups



(First Peoples State Relations, June 2021)

Aboriginal and Torres Strait Islanders¹⁰

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

In the Barwon region, Aboriginal and Torres Strait Islanders are almost two times as likely to be unemployed, with a 11.4 per cent unemployment rate.

The labour force participation rate among Aboriginal and Torres Strait Islanders (57.8 per cent) is more than four percentage points lower than average. Aboriginal and Torres Strait Islander households are more likely to earn less than \$650 per week (49.3 per cent) than average (38.8 per cent).

Furthermore, 18.7 per cent of Aboriginal and Torres Strait Islander young people in Barwon are not engaged in work or study. This is significantly higher than the average rate of 9.5 per cent.

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

Table 1.3.6: Aboriginal and Torres Strait Islander Analysis

Category	Measure	Victoria	Regional Victoria	Metro Melbourne	Barwon
Economic performance	Labour force participation rate (%)	64.5% ■	60.9% ■	65.8% ■	61.9% ■
	- Aboriginal and Torres Strait Islander Victorians	57.8% ■	52.8% ■	62.4% ■	57.8% ■
	Unemployment rate (%)	6.6% ▲	5.9% ▲	6.8% ▲	5.9% ■
	- Aboriginal and Torres Strait Islander Victorians	13.9% ■	16.5% ■	11.8% ■	11.4% ▼
Disadvantage and shared prosperity	Households earning less than \$650 per week (2016 dollars) (%)	34.8% ▼	43.1% ▼	31.8% ▼	38.8% ▼
	- Aboriginal and Torres Strait Islander households	47.7% ▼	56.6% ▼	39.2% ▼	49.3% ▼
	Children in jobless households (%)	16.4% ■	16.5% ■	16.3% ■	15.2% ■
	- Aboriginal and Torres Strait Islander children in households	36.3% ▼	40.9% ▼	31.4% ▼	
Cohesive and liveable communities	People aged 15+ who volunteer (%)	20.9% ▼	26.7% ▼	18.9% ▼	23.7% ▼
	- Aboriginal and Torres Strait Islander Victorians	19.9% ▼	19.5% ▼	20.3% ▼	21.2% ■
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% *	18.7% *

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

Trend

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

- ▲ or ▼ **Favourable trend** – average annual movement of 1.0% or more
- **Stable trend** – average annual movement of less than 1.0%
- ▲ or ▼ **Unfavourable trend** – average annual movement of 1.0% or more
- * Trend not calculated as comparable time series data was unavailable.

Shading

(not applied where comparison between regions is uninformative):

- More favourable than the corresponding regional Vic average – by 5.0% or more
- Similar to the corresponding regional Vic average – difference is less than 5.0%
- Less favourable than the corresponding regional Vic average – by 5.0% or more

(ABS, 2016a)

1.4 Labour Market

With 70 per cent of the region’s workforce spread across seven industries, Barwon’s employment is relatively diversified. Nonetheless, the region is still specialised in Agriculture, Forestry and Fishing, Accommodation and Food Services, and Health Care and Social Assistance.

- Over the past 10 years, employment has grown in 13 industries, with Mining and Professional, Scientific and Technical Services growing the fastest.

The region has outperformed regional Victoria across a range of employment measures.

- Despite intra-regional disparities, Barwon has a lower unemployment rate and higher labour participation rate than average across regional Victoria.
- In contrast, while labour productivity in the region has typically exceeded regional averages, Barwon’s labour productivity now equals that of the regional Victorian average.

Across Greater Geelong and Colac Otway municipalities, local jobs tend to be filled by local workers. In comparison, Queenscliffe and Surf Coast residents are more likely to commute for work.

Employment¹¹

In 2020, there were 156,192 employed persons (see Figure 1.4.1) in Barwon. Health care and Social Assistance (22,020 workers) was the largest employing sector, followed by Retail Trade (18,583 workers) and Construction (18,518 workers). The top seven employing industries account for just over 70 per cent of the region’s workforce. Construction Services is the largest employing sub-industry, accounting for almost 8 per cent of all workers in the region and 65 per cent of workers in the Construction sector (see Figure 1.4.2).

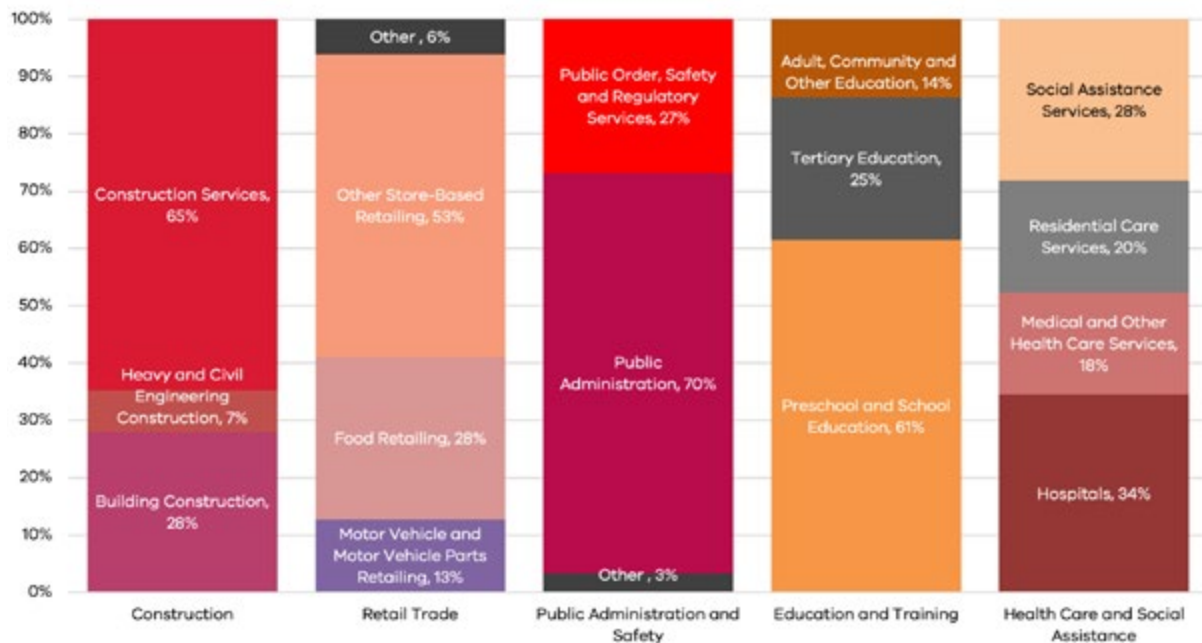
Figure 1.4.1: Employment by Industry



Source: (NIEIR, 2020)

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

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



Source: (NIEIR, 2020)

Over the past ten years, employment grew by an average rate of 2.0 per cent per year. This rate well exceeds the average across regional Victoria (1.0 per cent) but falls short of metropolitan Melbourne (2.1 per cent). Among industries, only four have realised a fall in employment (see Figure 1.4.3).

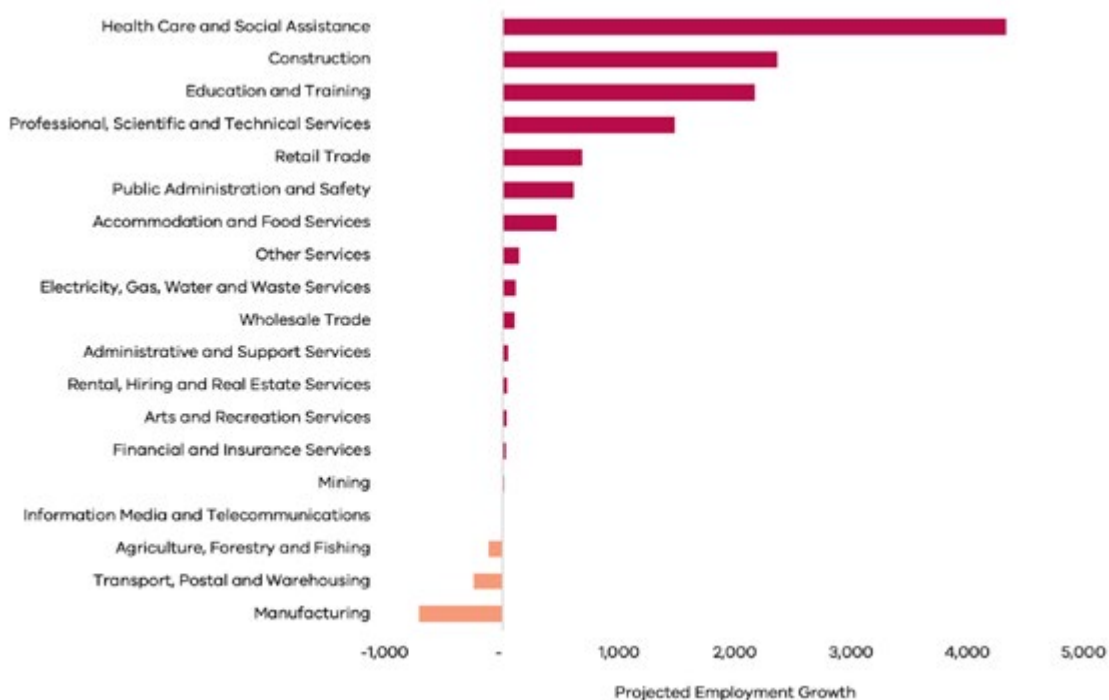
Figure 1.4.3: 10-year Average Annual Growth Rate (2011-20)



Source: (NIEIR, 2020)

Pre-COVID projections (see Figure 1.4.4) forecast employment to increase by 8.4 per cent over the next five years. This growth had been predicted to be driven by employment in Health Care and Social Assistance and Construction. Three industries were expected to see employment declines; Manufacturing, Transport, Postal and Warehousing, and Agriculture, Forestry and Fishing. However, due to the significant disruptions caused by COVID-19, employment outcomes will now significantly differ from those previously forecast.

Figure 1.4.4: Projected change in employment, Geelong SA4, 2019–2024



Source: (National Skills Commission, 2020)

In Barwon, 36 per cent of the workforce works part time (see Figure 1.4.5). This rate is similar to the average rate across regional Victoria (36 per cent) and is significantly higher than that of metropolitan Melbourne (32 per cent).

Figure 1.4.5: Composition of employment (2020)



Source: (NIEIR, 2020)

Unemployment rate

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

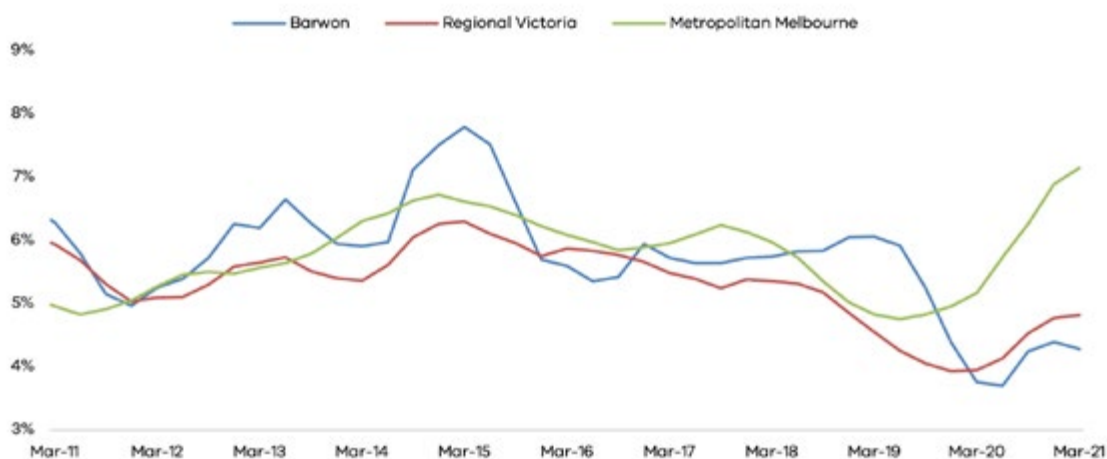
Prior to the onset of the COVID pandemic (March quarter 2020), the unemployment rate in the region was 3.8 per cent. This was below that of regional Victoria (3.9 per cent) and metropolitan Melbourne (5.2 per cent).

The region’s long-term unemployment rate (December Qtr 2010 to March Qtr 2021) is 5.7 per cent, is higher than regional Victoria’s (5.3 per cent) yet lower than metropolitan Melbourne’s (5.8 per cent).

Unemployment rate estimates since COVID has seen the unemployment rate in the region rise to 4.3 per cent, below the regional average.

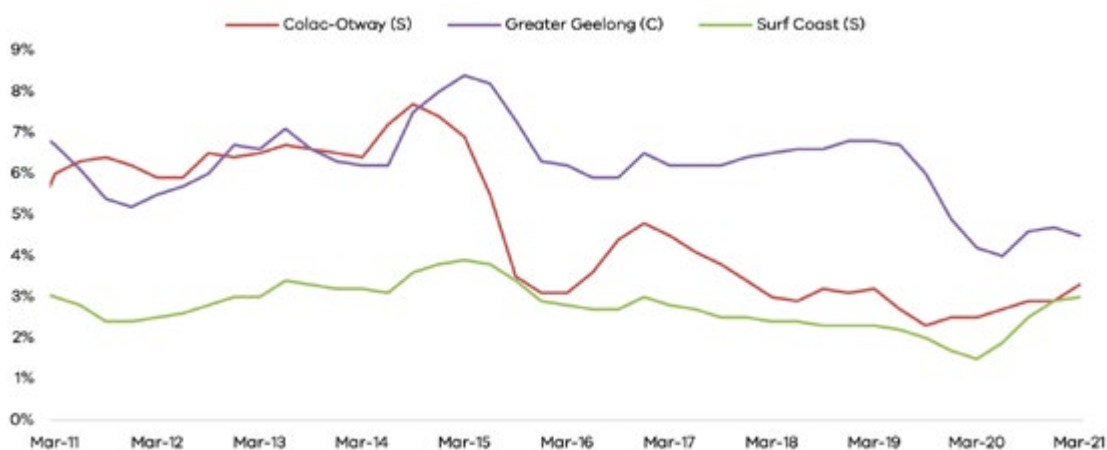
This has been consistent for each LGA. Amongst LGAs, Greater Geelong’s unemployment rate is relatively high (see Figure 1.4.7).

Figure 1.4.6: Unemployment Rate (2011–2020)



Source: (National Skills Commission, 2021)

Figure 1.4.7: Unemployment Rate, Barwon LGAs



Source: (National Skills Commission, 2021)

Note that Queenscliffe does not appear in Figure 1.4.7 as data is unavailable. This is due to time series breaks from the 2011 to the 2016 ASGS.

Participation rate

The labour force participation rate in Barwon (61.9 per cent) slightly exceeds regional Victoria (60.9 per cent) but lags metropolitan Melbourne (65.8 per cent) (see Figure 1.4.8). Participation rates among young and middle-aged groups is higher than the average across regional Victoria, however falls behind for those aged 55 and above. This may reflect Barwon’s popularity as a place to retire at the end of one’s career. Compared with metropolitan Melbourne, the region only exhibits higher participation rates among people aged between 15 and 24 years and 45 and 54 years (see Figure 1.4.9).

Figure 1.4.8: Participation Rate (2016)

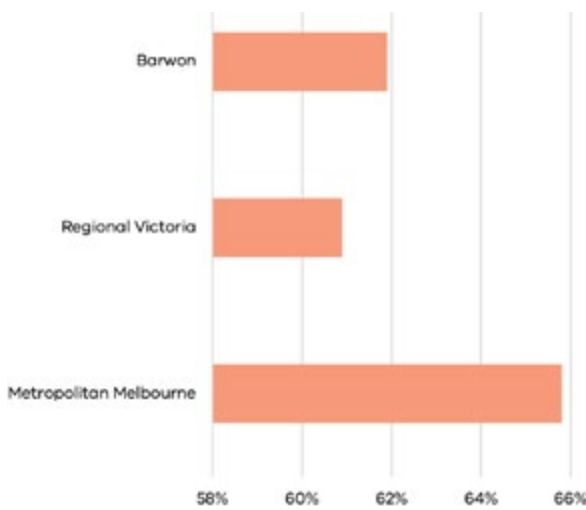
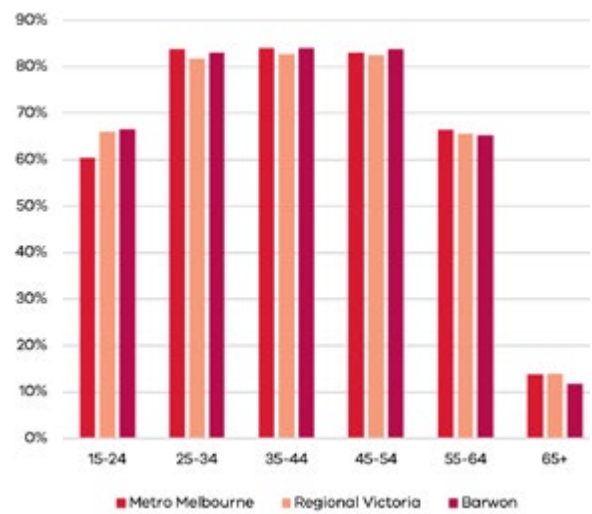


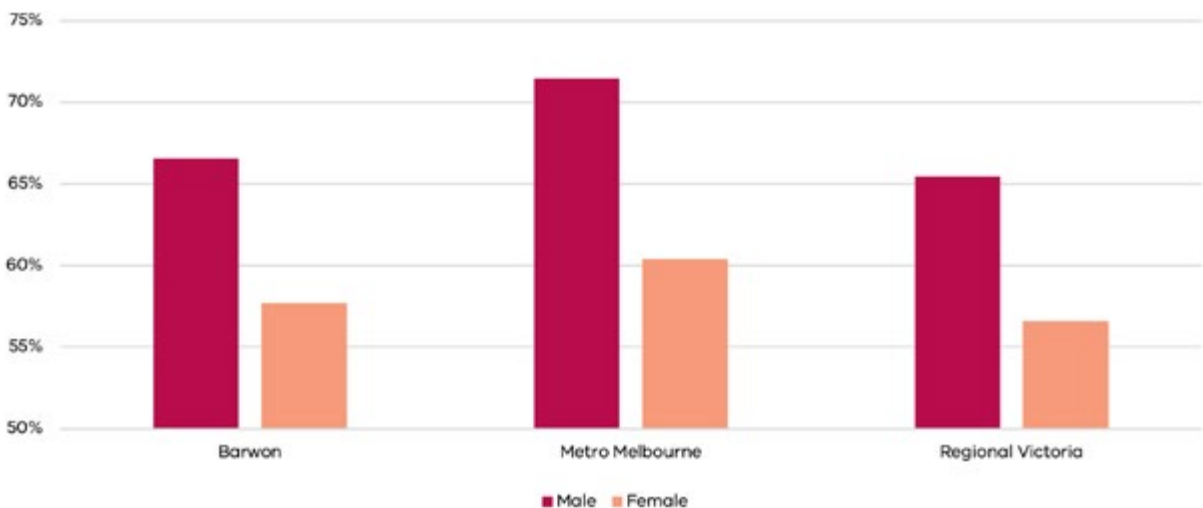
Figure 1.4.9: Participation Rate Age Comparison



Source: (ABS, 2016a)

Consistent with the pattern across the state, the female labour force participation rate in the Barwon Region (57.7 per cent) lags significantly behind the male participation rate (65.2 per cent). While participation rates for both genders exceeds that of regional Victoria, there are opportunities to boost future economic growth if participation rates, particularly for women, could be lifted and employment opportunities created (see Figure 1.4.10).

Figure 1.4.10: Participation Rate by Gender (2016)



Source: (ABS, 2016a)

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

Since 2005, Barwon labour productivity has gradually decreased to converge with the average rate across regional Victoria. The region’s labour productivity is below that of metropolitan Melbourne which has shown a steady increase since the turn of the century (see Figure 1.4.11).

Across LGAs, there are discrepancies in worker productivity. While all are trending downwards since 2005, the Borough of Queenscliffe and Surf Coast Shire have relatively high labour productivity, while Greater Geelong and Colac Otway has relatively lower levels (see Figure 1.4.12)

Figure 1.4.11: Regional Productivity

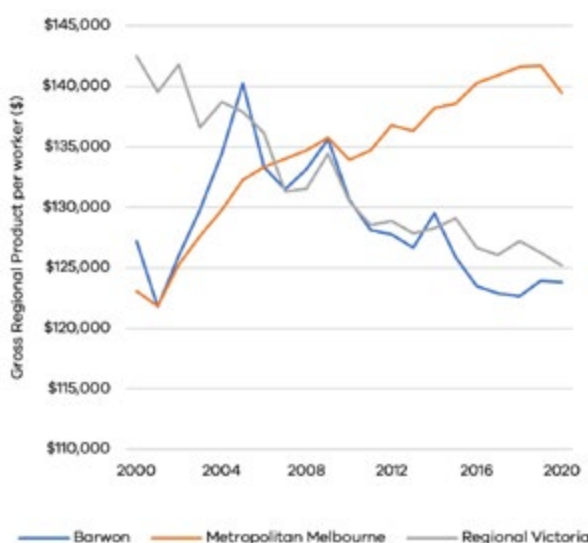
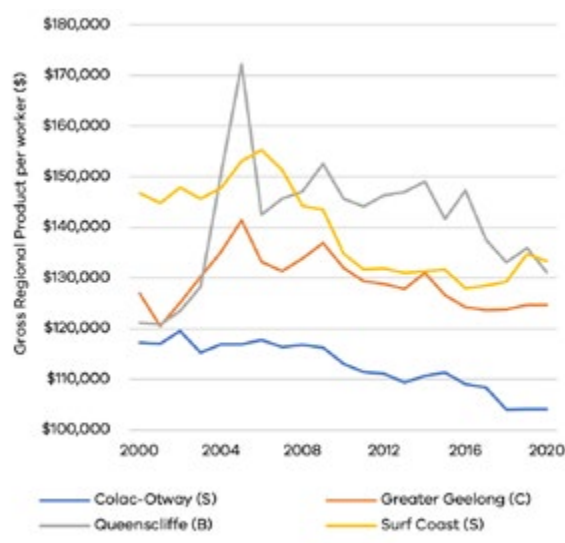


Figure 1.4.12: LGA Productivity, Barwon



(NIEIR, 2020)

Worker mobility and commuting across regions

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.

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

Colac-Otway has the largest proportion of local jobs filled by residents (88 per cent). In comparison, only 31 per cent of jobs in Queenscliffe are filled by local residents.

Consequently, there are also large variations in the proportion of workers who work within their LGA of residence; known as self-containment.

Among LGAs, 90 per cent of employed residents in Colac-Otway work in the municipality. In contrast, only 39 per cent of employed Queenscliffe residents work within the municipality. A significant proportion commute into Greater Geelong for work. Similarly, Surf Coast only has 44 per cent of its resident workers employed in the LGA, with a large number working in Greater Geelong, and Melbourne.

These patterns reflect the import role Greater Geelong plays in creating and maintaining employment opportunities across the Barwon region. Furthermore, the data also shows the importance of strong transport connections with metropolitan Melbourne as over 13,500 commute into the city for work (see Tables 1.4.13 and 1.4.14).

Table 1.4.13: Labour Mobility

	Colac Otway (S)	Greater Geelong (C)	Queenscliffe (B)	Surf Coast (S)
Total local workers (working anywhere) (UR)	9,551	103,584	1,046	14,084
Number of jobs in local area (POW)	9,386	95,058	1,279	8,694
Number of local jobs held by locals	8,266	78,907	394	5,854
Number of locals employed outside LGA	1,285	24,677	652	8,230
Employment Self containment	90%	80%	39%	44%
Employment Self Sufficiency	88%	83%	31%	67%

Source ABS, Census 2016

Table 1.4.14: Labour Mobility Across LGAs

Place of work → Place of residence ↓	Colac Otway (S)	Greater Geelong (C)	Queenscliffe (B)	Surf Coast (S)	Outside Barwon
Colac Otway (S)	8,266	254	0	164	541
Greater Geelong (C)	339	78,907	804	2,203	16,387
Queenscliffe (B)	0	410	394	10	185
Surf Coast (S)	253	5,104	9	5,854	2,108
Outside Barwon	523	10,328	72	455	

Source: (ABS, 2016a)



1.5 Skills

Barwon has experienced strong employment growth across a range of occupations, including strong growth in skilled professions. However, employment growth has not been equally distributed across occupations.

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

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

Occupation

In 2021, there were 90,700 workers in Barwon in skilled occupations, which is 61.7 per cent of the local workforce. As a proportion of the total workforce, Barwon has a lower share of skilled workers than regional Victoria (62.2 per cent) and metropolitan Melbourne (67.3 per cent).

In the five years to 2021, the number of skilled workers increased by 12,300 workers (15.7 per cent), while the number of low skilled workers increased by 1,200 workers (2.3 per cent).

The rising number of skilled workers is consistent with trends across regional Victoria and metropolitan Melbourne, where employment among skilled workers grew by 8.8 per cent and 22.1 per cent respectively.

Sales Assistants (General) were the largest employing occupation in Barwon, followed by Registered Nurses and Retail Managers. In the five years to 2021, each of the top ten employing occupations experienced an increase in total number of workers, with the exception of Aged and Disabled Carers. Registered Nurses, Retail Managers and Primary School Teachers have realised the largest increases in workers across the period. Six of the top ten are skilled professions.

Table 1.5.1: Top 10 Employing Occupations

Barwon	2021	2016	Change	Skill level*
Sales Assistants (General)	9,400	9,200	200	Low Skilled
Registered Nurses	5,000	4,000	1,000	Skilled
Retail Managers	4,000	3,100	900	Skilled
General Clerks	3,100	2,900	200	Low Skilled
Primary School Teachers	3,000	2,400	700	Skilled
Receptionists	3,000	2,800	200	Low Skilled
Secondary School Teachers	3,000	2,400	600	Skilled
Aged and Disabled Carers	2,600	2,600	-100	Skilled
Truck Drivers	2,300	2,200	100	Low Skilled
Motor Mechanics	2,100	1,700	500	Skilled

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



02 Comparative Advantage

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

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

Nonetheless, the analysis in this report provides a consistent picture of the region's revealed comparative advantage. As indicated by high levels of employment and GVA specialisation, and business clustering, the region has a strong advantage in Construction, Manufacturing, Retail Trade and Education and Training. This suggests the region has many local factors which may lead to additional economic opportunities.

The drivers behind the comparative advantages of the region are varied and will include local infrastructure, natural resources and proximity to inputs or key markets. A point in time snapshot undertaken by Infrastructure Victoria in 2019 (Barwon, Industry Profile 2019) found the region has considerable endowments across a range of attributes:

2.1 Transport Infrastructure

Barwon is located to the southwest of Melbourne and is well connected to the state capital through an extensive road and rail network (see Figure 2.1.1). These networks connect the region to the ports at Melbourne, Geelong and Portland and are important for supporting economic activity and accessing interstate and international markets.

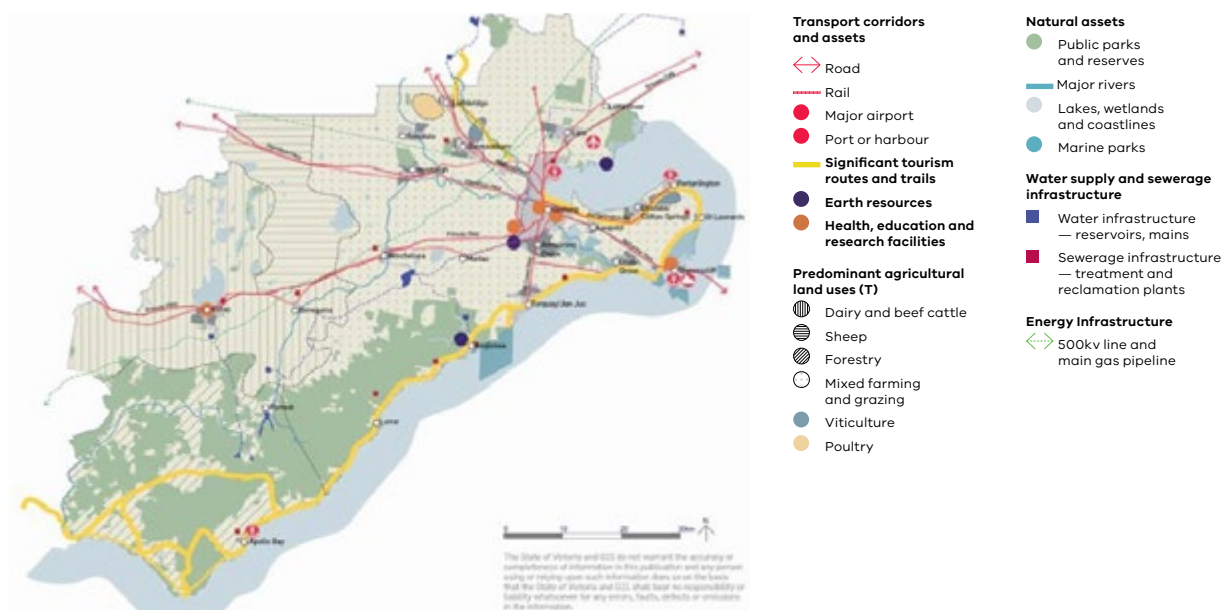
A regional profile of Barwon completed in 2019 for Infrastructure Victoria identified that key transport infrastructure is centred around the road network, including:

- the Princes Highway, connecting Melbourne to Geelong, Warrnambool and Portland through to Adelaide
- the Midland highway which connects Geelong to Ballarat, Bendigo, Shepparton, Benalla and Mansfield
- the Hamilton Highway connecting Geelong to Cressy, Mortlake and Hamilton
- the Great Ocean road connecting the coastal towns from Torquay to Lorne, Apollo Bay and Allansford
- the Bellarine Highway connecting Geelong to Queenscliff and Sorrento (via ferry) and the Surf Coast Highway, connecting Geelong to Torquay.

The rail network includes direct passenger and freight rail routes from Geelong to Melbourne and Warrnambool. The region also has interstate passenger and freight connections between Adelaide/ Perth and Melbourne as well as freight access to Port of Melbourne and Geelong Port.

Avalon Airport is located in the region, providing access to international markets, while also being within close proximity to Tullamarine international airport. The region also has a major port in Geelong Port which handles approximately 12 million tonnes of product per year with 600 vessel visits (Geelong Port, 2020).

Figure 2.1.1: Transport Connections, Barwon



Source: (Infrastructure Victoria, 2019)

2.2 Digital Infrastructure¹²

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

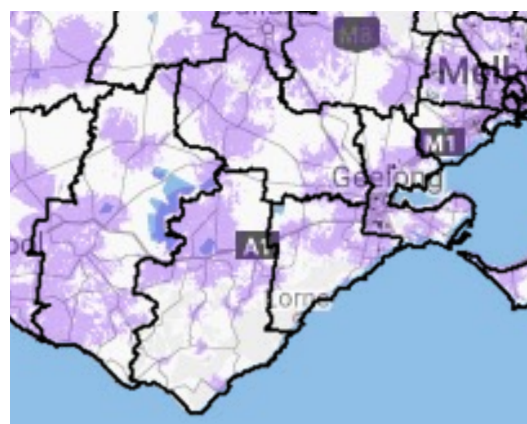
Table 2.2.1: ADII score comparison 2021, VIC

Local Government Area	Score
Colac-Otway	63.0
Greater Geelong	69.0
Queenscliffe	63.0
Surf Coast	70.0
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 2.1.2). In addition, coverage should not be taken to indicate connection quality.

Figure 2.2.2: NBN Rollout map, Barwon



(NBNco, 2020)

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

- The ability of current infrastructure to handle increased network demand due to population growth, remote work and migration trends during COVID and increased dependency on cloud-based services.
- Challenges of emergency workers to effectively communicate using current infrastructure, and associated safety risks.
- The expansion of home businesses is limited by inadequate connectivity in the region.
- Poor connectivity impacts on the visitation experience which dampens the region's economic growth. Investment in NBN and other infrastructure is needed to support tourism and population growth.

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 Barwon Digital Plan found that almost all tourist attractions had issues with fixed access broadband services. Almost half of the tourist spots analysed appear to have inadequate mobile coverage based on public coverage data, with beaches, national parks and trails unsurprisingly underserved (RDV, 2019).

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

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

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

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

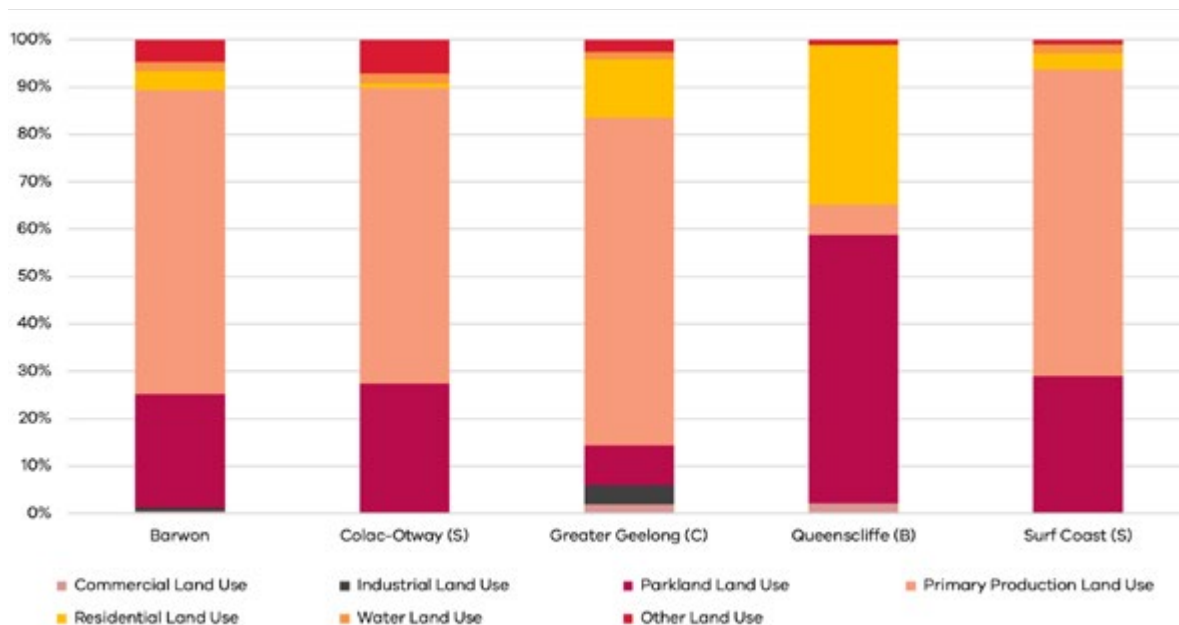
	Fixed broadband access	Mobile access
Cities and large towns, such as Geelong and Colac	Generally comparable to metropolitan Melbourne with some access to FTTP and widespread provision of FTTN within town centres, but fixed wireless and satellite serving the town fringe and beyond	Generally comparable 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 Batesford and Birregurra	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 southwest of Colac	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 Bells Beach	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

Source: (Infrastructure Victoria, 2019)

2.3 Natural Endowments

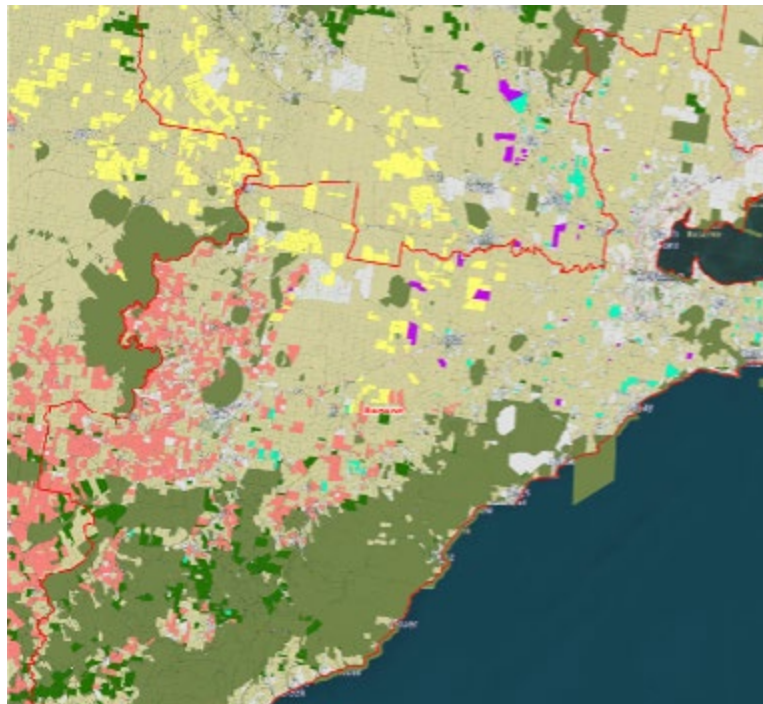
Figures 2.3.1 and 2.3.2 indicate the land use in the Barwon and its constituent LGAs. While land use in the region varies, most is used for primary production (64%). Sheep and Beef grazing covers much of the land across the north of the region, which is also home to other livestock and cropping. To the west, Colac Otway utilises much of its primary production land for dairy. The south west largely comprises public land with some interspersed forestry and primary production activities. Land use around Geelong represents the urban sprawl of the regional centre. The eastern region has more urban area which is expected to grow as the Geelong and Melbourne urban fringes extend. This is likely to cause contested land use between agricultural uses and residential / industrial use (Infrastructure Victoria, 2019).

Figure 2.3.1: Land Use by LGA, Barwon



Source: (ABS, 2017)

Figure 2.3.2: Spatial Map of Land Use



Source: (Agriculture Victoria , 2020)

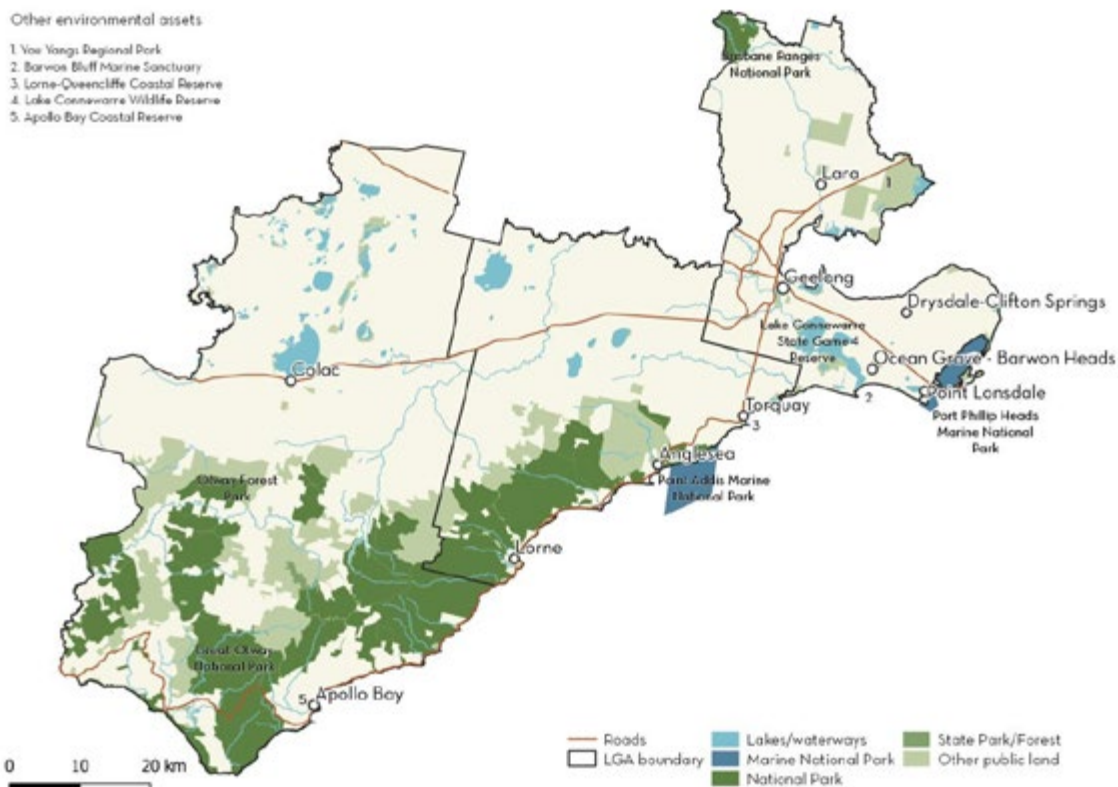
Environmental assets

24 per cent of Barwon’s land is public land and parkland. Queenscliffe has significant proportion of its limited land area as public land while Colac Otway is home to the Great Otway national park. 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 environmental assets are diverse, including coastal and marine parks, wetlands, woodlands, forests and grasslands (Infrastructure Victoria, 2019). Many of these sites are associated with Aboriginal Cultural heritage and provide amenities to local communities and region tourists.

Table 2.3.3: Key Environmental Assets, Barwon

National Parks	State Forest and State Parks	Other
<ul style="list-style-type: none"> • Great Otway National Park • Brisbane Ranges National Park • Port Phillip Heads Marine National Park • Point Addis Marine National Park 	<ul style="list-style-type: none"> • Lake Connewarre State Game Reserve 	<ul style="list-style-type: none"> • You Yangs Regional Park • Barwon Bluff Marine Sanctuary • Lorne-Queenscliffe Coastal Reserve • Lake Connewarre Wildlife Reserve • Apollo Bay Coastal Reserve

Figure 2.3.4: Key Environmental Assets, Barwon



Source DELWP (2019), DEE (2016).

Source: (Infrastructure Victoria, 2019)

Mineral resources and forestry

The Barwon region is not significant source of mineral resources. However, there are brown coal deposits near Anglesea and Lorne as well as basalt, limestone and sand deposits, including that which is accessed by the Batesford Quarry.

The Barwon region hosts forestry resources in the south west, in Colac Otway, including softwood plantations interspersed in state parkland and reserves (Infrastructure Victoria, 2019).

Renewable energy

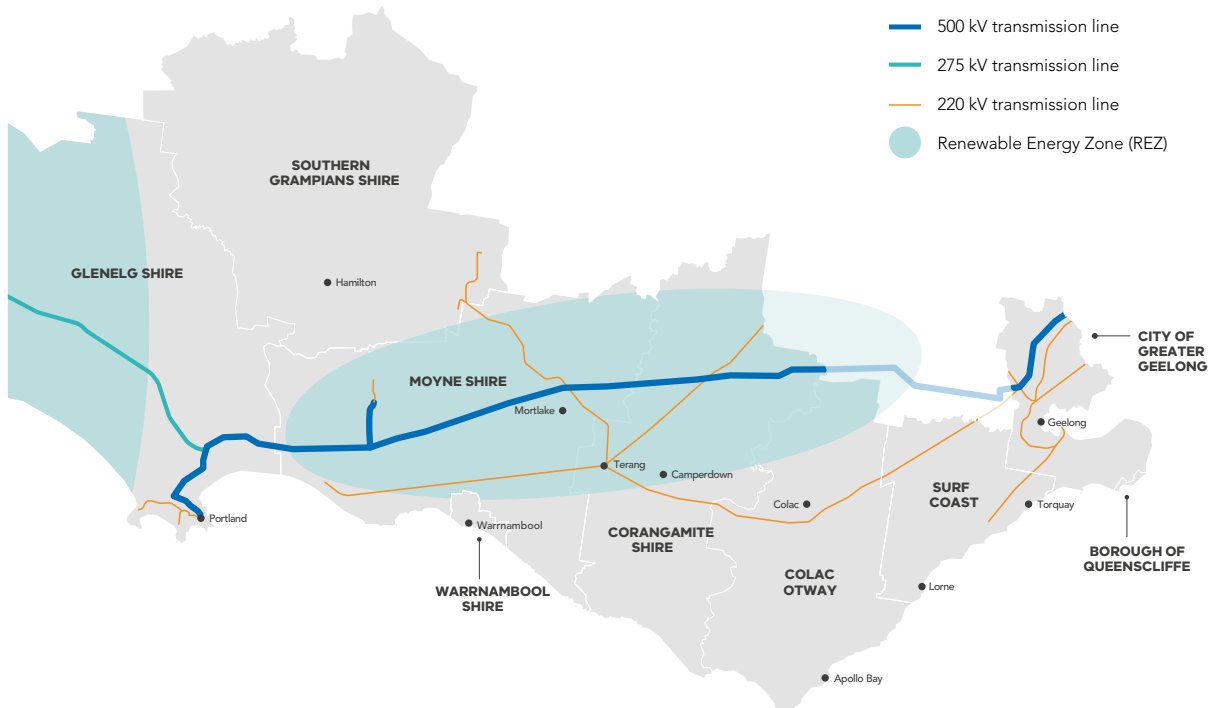
The Barwon region has an array of renewable energy assets, including wind, solar and bioenergy. Solar power is the most prominent source of renewable energy in the region, and along with wind is the communities preferred technology for renewable generation (DELWP, 2019).

The current renewable energy landscape in Barwon includes wind and solar generation in the inland northern areas of Colac Otway as well as solar farms in Geelong and near Torquay. Across LGAs, there is renewable energy generation capacity from existing rooftop solar as well as from commercial solar and wind farms. The regions current total renewable generation capacity is as follows; (DELWP, 2019)

- Colac Otway (140.0MW),
- Surf Coast (11.8MW),
- Greater Geelong (64.1MW), and
- Queenscliffe (1.4MW)

Northern sections of Barwon benefit from existing high voltage transmission infrastructure (see Figure 2.3.5). In particular, a 500kV transmission line links Latrobe Valley areas and the major demand locations of Melbourne and Geelong metropolitan areas to the Portland Aluminium smelter. There is also a transmission line connecting Portland to South Australia via the Heywood interconnector. This high voltage transmission infrastructure provides opportunity for renewable generation to maximise output exported out of the Barwon region, however southern parts of the region would require more significant infrastructure investment to be able to tap into large scale transmission (DELWP, 2019).

Figure 2.3.5: Transmission Infrastructure



Source: (DELWP, 2019)

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04 Strategic context

Barwon Regional Economic Development Strategy

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

The Surf Coast Shire: Economic Development Strategy 2021 – 2031 2021	
Purpose	Strategy is focused on a growing a more diverse and sustainable economy for the Surf Coast, one that strengthens its vibrant local places and businesses, and nurtures new industries servicing national and global markets.
Identified priorities	<p>Place:</p> <ul style="list-style-type: none"> • Events that create a sense of place, community connection and thriving businesses • Connected and inspiring Places <p>People</p> <ul style="list-style-type: none"> • Slow and purposeful tourism • Our culture and identity is shared and celebrated • Jobs for current and future generations <p>Business</p> <ul style="list-style-type: none"> • A thriving, connected business network • A destination of choice for emerging and innovative industries • An economy with a conscience
Influence on the REDS strategic directions	<p>Manufacturing</p> <hr/> <p>✓ Innovation</p> <hr/> <p>✓ Visitor economy</p> <hr/> <p>✓ Service sector</p> <hr/> <p>✓ Sustainability</p>
The Surf Coast Shire: A Prosperous Place Our Economic Story 2021	
Purpose	Lays out the economic narrative for the Surf Coast through the lens of Place, People and Business. Accompanied by the Economic Growth Strategy 2021-2031.
Identified priorities	N/A
Influence on the REDS strategic directions	<p>Manufacturing</p> <hr/> <p>✓ Innovation</p> <hr/> <p>✓ Visitor economy</p> <hr/> <p>✓ Service sector</p> <hr/> <p>✓ Sustainability</p>

Barwon South West Renewable Energy Roadmap 2020	
Purpose	Identifies opportunities to attract investment and better understand the community’s engagement and capacity to transition to renewable energy. Provides intelligence to business, industry and communities seeking to establish or expand new energy technology development, manufacturing or renewable energy generation in Victoria.
Identified priorities	<ul style="list-style-type: none"> • Support energy decentralisation initiatives • Develop and promote policy that fosters regional innovation and local strategies that clearly contribute to Victoria’s overall targets • Understand the impacts of renewable energy generation on local assets • Work with regional TAFEs and universities to develop appropriate skill-based programs • Communicate more clearly and effectively on the benefits, opportunities and limitations of renewable energy technology • Develop a collective, co-ordinated regional vision for G21 and the broader Barwon South West • Look for renewable energy collaboration opportunities • Focus on waste management and its impact on the local area.
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation Visitor economy Service sector ✓ Sustainability
Barwon Digital Plan 2019	
Purpose	Identifies gaps and opportunities across the region’s digital landscape and makes recommendations to address gaps and to realise the region’s full digital potential
Identified priorities	<ul style="list-style-type: none"> • Enhanced NBN and business grade services • Improved opportunities for public WiFi • Adequate mobile coverage • Better connectivity in education sector • Pilot blackspot program for low bandwidth IoT networks • Fast track rollout of 5G • Better service standards • Augmented business clusters and shared services • Improved tourist networks • Digital access for remote communities
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation ✓ Visitor economy ✓ Service sector Sustainability

Colac Otway Economic Development Strategy
2019

Purpose Outlines plans and strategies to help develop the Colac Otway Shire’s existing industries and businesses. The strategy also highlights key projects to be pursued to change the region’s economy, for a sustainable future.

- Identified priorities**
- Support local businesses to grow and succeed in the global market place
 - Build on local competitive advantages
 - Provide a regulatory framework that is consistent and efficient
 - Provide a whole-of-Council approach to business inquiries and investment
 - Respect the natural environment
 - Promote and celebrate sustainable, innovative and creative businesses
 - Facilitate constructive, collaborative working relationships between Government, industry and associations

Influence on the REDS strategic directions	✓	Manufacturing
	✓	Innovation
	✓	Visitor economy
		Service sector
	✓	Sustainability

Barwon Regional Partnership Outcomes Roadmap
2019

Purpose Outlines the long-term outcomes and the challenges associated with achieving them

- Identified priorities**
- An integrated, accessible and progressive transport network
 - Vibrant, liveable cities and towns
 - Protected environments and prepared, resilient communities
 - A flourishing culture of entrepreneurship, innovation and growth
 - Supported, fair and nurturing Barwon communities
 - Strong education futures for our young people
 - A thriving and sustainable Barwon tourism economy

Influence on the REDS strategic directions	✓	Manufacturing
	✓	Innovation
	✓	Visitor economy
	✓	Service sector
	✓	Sustainability

Greater Geelong and the Bellarine Tourism Development Plan
2019

Purpose	Identify key tourism product and supporting infrastructure which will meet the needs of existing and future visitors to the region
Identified priorities	<ul style="list-style-type: none"> • Infrastructure and enabling projects • Experiential product development • Accommodation
Influence on the REDS strategic directions	<p>Manufacturing</p> <hr/> <p>Innovation</p> <hr/> <p>✓ Visitor economy</p> <hr/> <p>Service sector</p> <hr/> <p>Sustainability</p>

Geelong Economic Futures
2017

Purpose	Report to identify credible large-scale economic growth opportunities. It is conceived as a template for a productive approach to regional development - one led with local input and then supported by governments and the markets.
Identified priorities	<ul style="list-style-type: none"> • High-security, low-cost water solutions to drive high value drought proof regional farming • Lead role in Asian biosecurity/infectious disease response through CSIRO Animal Health laboratory • Largest, lowest-cost interstate and seaport road and rail freight terminal being built at Avalon, adjacent to airport • Carbon fibre manufacturing industry, capitalising on Carbon Nexus research centre • Geelong as Asian hub for commercialised training and education in agriculture and agribusiness
Influence on the REDS strategic directions	<p>✓ Manufacturing</p> <hr/> <p>✓ Innovation</p> <hr/> <p>Visitor economy</p> <hr/> <p>✓ Service sector</p> <hr/> <p>Sustainability</p>

Greater Geelong: A Clever and Creative Future 2017	
Purpose	By 2047, Greater Geelong will be internationally recognised as a clever and creative city-region that is forward looking, enterprising and adaptive, and cares for its people and environment. This community vision document, which will guide our region’s development over the next 30 years
Identified priorities	<ul style="list-style-type: none"> • A prosperous economy that supports jobs and education opportunities. • A leader in developing and adopting technology • Creativity drives culture • A fast, reliable and connected transport network • A destination that attracts local and international visitors. • People feel safe wherever they are • An inclusive, diverse, healthy and socially connected community • Sustainable development that supports population growth and protects the natural environment • Development and implementation of sustainable solutions
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation ✓ Visitor economy ✓ Service sector ✓ Sustainability
G21 Region Road Transport Plan 2017	
Purpose	Developed to assist with the development of the transport system by recognising opportunities and challenges, and providing advocacy for improvements.
Identified priorities	<ul style="list-style-type: none"> • Supports the growth of established and emerging industries • Responds to structural changes • Strengthens regional economic and social opportunities • Promotes sustainable transport • Supports population growth within the region
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation ✓ Visitor economy ✓ Service sector ✓ Sustainability

Queenscliffe Economic Development Strategy
2017

Purpose The goal of the strategy is to future-proof the region, ensuring sustainable business, driving economic benefits for the greater community and saluting our heritage values so that our safe haven can welcome and support a thriving population for generations to come.

- Identified priorities**
- Increase sustainable yield from the visitor economy
 - Connect and partner with local government counterparts and large employers in the region
 - Utilise built and natural assets to deliver experiential excellence for visitors
 - Diversify the local economy into non-visitor sectors
 - Present the Borough as a premier location for retirees

Influence on the REDS strategic directions	✓ Manufacturing
	✓ Innovation
	✓ Visitor economy
	Service sector
	Sustainability

Surf Coast Council Plan
2017

Purpose Identifies key priorities and strategic themes that will help guide decision making, as well as incorporates the Surf Coast Shire’s Health and Wellbeing Plan, reflecting Council’s commitment to improving the health and wellbeing of our community.

- Identified priorities**
- Community Wellbeing
 - Environmental Leadership
 - Balancing Growth
 - Vibrant Economy
 - High Performing Council

Influence on the REDS strategic directions	Manufacturing
	Innovation
	✓ Visitor economy
	Service sector
	✓ Sustainability

Revitalising Central Geelong Action Plan
2016

Purpose Sets out initiatives designed to turn central Geelong into a magnet for new jobs and growth. The Action Plan will coordinate state and local government involvement in central Geelong – providing focus for structural, policy and physical changes necessary to attract private sector investment and stimulate growth.

- Identified priorities**
- People living and working in the city
 - Permanent and construction job creation
 - Demand for retail and services
 - Creativity and vibrancy across the city day and night
 - New development opportunities
 - Private sector confidence to invest in central Geelong

Influence on the REDS strategic directions	Manufacturing
	✓ Innovation
	✓ Visitor economy
	✓ Service sector
	Sustainability

Strategic Master Plan – Great Ocean Road Region Visitor Economy
2015

Purpose The primary objective of the Plan is to increase the yield generated from tourism visitation through the provision of quality visitor experiences, providing significant economic benefits to local communities.

- Identified priorities**
- Shipwreck Coast Master Plan
 - Investment attraction and facilitation, both public and private, to address current product gaps
 - Maintenance and renewal of signature product/experiences
 - Destination Development – ongoing implementation, development and renewal of local destination action plans
 - Focus on product development, marketing and visitor servicing to generate increased length of stay, increased spend and dispersal
 - Industry capacity building to grow the quality of the visitor experience
 - Actions to address the challenges of peak visitation in coastal areas

Influence on the REDS strategic directions	Manufacturing
	Innovation
	✓ Visitor economy
	Service sector
	Sustainability

G21 Economic Development Strategy
2014

Purpose	The strategy is an extension of the Geelong Regional Plan and aims to activate its priorities through strategic focuses paired with game changer projects.
Identified priorities	<ul style="list-style-type: none"> • Strategic and Integrated Transport Infrastructure • Geelong City Reactivation • Coordinated Critical Infrastructure Plan • Globally Significant Innovation and Research Centre • Open for Business
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation Visitor economy ✓ Service sector ✓ Sustainability

G21 Regional Growth Plan
2014

Purpose	The plan manages growth and land use pressures to 2050. It pulls together the strategic land use and growth planning already done across the region and builds on this to identify where future residential and employment growth will occur and the critical infrastructure required to support it.
Identified priorities	<ul style="list-style-type: none"> • An efficient and effective transport network • Strong economy and job diversity • A vibrant and healthy Central Geelong • Infrastructure to support new and existing areas • Adequate land set for housing and employment
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation Visitor economy ✓ Service sector ✓ Sustainability

G21 Geelong Regional Plan 2007	
Purpose	Identifies and addresses the challenges the region will face up to 2050 in the areas of environment, settlement, land use, community strength and economy
Identified priorities	<ul style="list-style-type: none"> • Refocus economy • Create sustainable settlements • Strengthen our communities • Protect and enhance our environment
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Manufacturing ✓ Innovation ✓ Visitor economy ✓ Service sector ✓ Sustainability
Eastern Maar Country Plan – Meerreengeeye Ngakeepoorryeeyt 2020	
Purpose	The Plan defines the self-determined vision for the future of the Eastern Maar people.
Identified priorities	<ul style="list-style-type: none"> • Wellbeing of citizens • Active youth • Strong identity • Healthy Country • Cultural strength • Economic independence
Influence on the REDS strategic directions	<ul style="list-style-type: none"> Manufacturing Innovation Visitor economy Service sector ✓ Sustainability

Paleert Tjaara Dja: Wadawurrung Healthy Country Plan
2020

Purpose The plan lays out how Wadawurrung see Country being cared for and managed over the next 10 years. This includes walking together with government (federal, state, and local) and other key stakeholders to achieve self-determination, ensuring sustainable Wadawurrung managed investment in Country going forward.

- Identified priorities**
- Taking care of Country and waters
 - Us supporting us – Cultural Strengthening
 - Strengthening Wadawurrung Corporation

Influence on the REDS strategic directions	Manufacturing
	Innovation
	Visitor economy
	Service sector
	✓ Sustainability

Contact us

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