



NORTHERN GRAMPIANS SHIRE COUNCIL

ECONOMIC DEVELOPMENT STRATEGY AND ACTION PLAN 2021-31

Background Paper: Socioeconomic Data Analysis





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Jadawadjali, Wergaia, Jupagulk and Dja Wurrung peoples who are the Traditional Custodians of the land on which we discuss in this report. We pay our respects to the Elders both past and present and extend that respect our other Aboriginal clan groups.

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We, the undersigned, are committed to ensuring the on-going development of Northern Grampians, by working with Council to deliver a long term Economic Development Strategy and Action Plan.

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1. Overview

This chapter presents a systematic examination of the components of Northern Grampians economy. It does not provide recommended responses to the data; it is simply a presentation of the economic and social context in Northern Grampians. Insights provided by the data, along with the findings of qualitative research (part 4 and 5 of the background paper) will be used to develop a strategy that is tailored to the chosen approach and Northern Grampians unique circumstances.

Why Data Is Important

Baseline data analysis provides us with an important understanding of:

- Industry mix
- What industries are driving our economy
- The role our economy plays
- The makeup of our community including who is staying, who is going, and the skills that exist within our community

Northern Grampians is intimately linked with the rest of the world through the inflow and outflow of income and goods. Northern Grampian uses resources (local or nonlocal) to produce the output it sells.

The size of economic activity is determined by:

- Inflow of outside income
- Lack of leakage of income
- Volume of resources used to produce the location/region's output

This report presents the 2019 pre-COVID-19 socioeconomic baseline and growth trends by looking at:

- Gross Regional Product
- Value-added
- Exports
- Local sales
- Jobs, wages and salaries
- Productivity
- Size of businesses
- Population
- Migration
- Status of employment

COVID-19 economic impact data is presented for the purpose of understanding and monitoring the economic impact of COVID-19. This is key to predicting the likely longer-term impacts on our businesses and workforce, positioning Council to make strong decisions that will spur long-term recovery and building an evidence base for recovery strategies.

Working With Our Community

The report identifies growing industries, driving industries (industries that have a substantial influence on economic growth) and industries with a level of specialisation. This analysis is used to identify where we need to focus our attention when engaging with our business and wider community to gain a deeper understanding of Northern Grampians unique assets, strengths and opportunities for growth, as well as key issues and barriers to growth.

Qualitative research will also be used to understand:

- Existing linkages between firms/ locations/regions
- How to strengthen existing linkages, and how to establish new, beneficial relationships among firms/locations/regions
- Where Council could focus efforts to influence economic change

Qualitative research will focus on key sectors identified through the data analysis.





2. Executive Summary

Economic Context

In 2019 Northern Grampians' GRP was estimated at \$6730M. GRP has increased from around \$630M in 2014 despite unfavourable population factors and drought conditions. However, Northern Grampians GRP hasn't grown in line with the State or the wider Grampians Region over the past ten years.

In 2019, the most significant industries in terms of total value-added to the Northern Grampians economy were Sheep and Grain (12%), Gold Mining (Non Ferrous Metal Ore Mining) (9.3%) and Meat and Meat Product Manufacturing (7.1%). Over the ten-year period from 2010-2019, the highest total amount (\$M) of value-added came from Mining (17%), Sheep and Grain (9.1%) and Health Care Services (7%). When looking at value-added in 2019 compared to 2010 Sheep and Grain was up by 47%, Gold Mining (Non Ferrous Metal Ore Mining) was down by -63% and Meat and Meat Product Manufacturing was up by 131% in 2019 compared to 2010.

In terms of the strongest percentage growth in 2019 compared to 2010, by far the strongest increase was in 'Other Agriculture' (including vegetable, grape, olive and turf growing and nursery production), which grew by 484% in 2019 compared to 2010. This was followed by Library and Other Information Services (283%), Construction (204%) and Non Metallic Mineral Mining (167%). Other high growth industries in percentage terms included Heavy & Civil Engineering Construction (158%), Residential Care & Social Assistance Service (133%), Bakery Product Manufacturing (125%) and Poultry and Other Livestock (116%).

Northern Grampians total regional export in 2019 was estimated at \$704M.

In 2019 the Meat and Meat Product Manufacturing industry accounted for just over 30% of goods sold outside Northern Grampians. Non Ferrous Metal Ore Mining made up 27% in 2019. Sheep and Grain exported close to 10% of total exports in 2019. The Accommodation industry accounted for \$34M of inflow into the Northern Grampians economy. Basic Chemical Manufacturing drew \$29M into the Northern Grampians economy.

Regional local sales estimate for Northern Grampians 2019 was \$401M. The Sheep and Grain sector accounted for the greatest total amount of local sales (\$100M in 2019) followed by Construction Services (\$51M), Poultry and Other Livestock (\$24M) and Professional, Scientific and Technical Services (\$16M).

Average productivity in Northern Grampians in terms of value-added per worker was estimated at \$0.12M in 2019. Productivity data shows that on a per worker basis, the finance sector contributed the most value-added to the Northern Grampians economy at \$0.62M per worker. Other industries among the most productive were Aircraft Manufacturing which contributed \$0.43M per worker, Cement, Lime and Ready-Mixed Concrete Manufacturing at \$0.36M per worker, Non Ferrous Metal Ore Mining at \$0.31M per worker and Basic Chemical Manufacturing \$0.30M at per worker.

In 2019 the total wages and salaries paid to employees in Northern Grampians was \$332M. Based on 2019 figures, jobs in Health Care Services delivered the greatest in total wages and salaries (\$33M), Residential Care and Social Assistance Services accounted for slightly more (\$33M), Meat and Meat Product Manufacturing made up \$28M, Public Administration and Regulatory Services totalled \$27M, followed by Non Ferrous Metal Ore Mining (\$23M).

In 2019 4,940 people were employed in Northern Grampians. Based on 2019 figures, the Sheep and Grain industry provided the greatest number of jobs in Northern Grampians (521). Health Care services employed 486 people, Retail delivered 475 jobs, Meat and Meat Product Manufacturing jobs totalled 422 jobs, Residential Care and Social Assistance Services employed 378 people, followed by Food and Beverage services employing 271 people.

The key economic indicators presented above were used to identify:

- What industries or occupations have a higher concentration and are more specialised in the Northern Grampians economy compared to the rest of Australia
- What industry sectors were driving our economy pre-COVID-19
- How our industry mix is shifting compared to the National economy

The analysis showed that a higher proportion (or importance) of local employment compared with the rest of Australia lie in Mining, Agriculture, Arts and Recreation Services, Manufacturing, Health Care and Social Assistance and Accommodation and Food Services. Industries which are underrepresented in Northern Grampians compared to the rest of Australia include the professional office-based sectors, Construction and Transport, Postal and Warehousing are also underrepresented in the local economy.

Industry sectors that drove the Northern Grampians economy in 2019 in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) were Meat and Meat Product Manufacturing and Sheep and Grain.

To understand structural changes in the Northern Grampians economy over time, 114 industries were grouped into five sectors that broadly describe the nature of the economic contribution and the jobs offered by each sector. The analysis found that although the Northern Grampians Economy is slightly different to what is observed Nationally, the economy is shifting in the same direction in terms of the proportion of jobs and value-added across broad industry sectors. That is that the primary sector (Agriculture and Mining), the secondary sector (Manufacturing, Construction and Utilities), and the tertiary sector (Wholesaling, Retailing and Transport) are reducing in relative terms within the economy.

Nearly half (49%) of all jobs and value-added in Northern Grampians come from the quaternary sectors (inc. Financial Services, Property Services and Education and Training) and quinary sectors (Health Care and Social Assistance and Accommodation and Food). The primary, secondary and tertiary sector combined represented nearly 51% of value-added. Job numbers also reflect this trend, the quaternary and quinary sectors making up 50.4% of all jobs, compared to the combined total of the primary, secondary and tertiary sectors which contributed 49% of total employment. Over the past decade or so, Northern Grampians economy has become less diverse, however it is the second most diverse economy in the Wimmera Southern Mallee, second to Horsham Rural City.

Official national accounts data, results from the Australian Business Economic Impact Survey (ABEIS), academic publications, and modelling paint a picture of how COVID-19 is impacting Northern Grampians' economy. Many Local Government areas (LGAs) across Australia have experienced a significant decline in output since Australia recorded its 100th confirmed COVID-19 case in the week ending 14 March 2020. Economies with significant Mining and Agriculture industries, as is the case for Northern Grampians, are likely to be buffered somewhat by comparisons to economies with a greater reliance on sectors associated with Tourism. This report shows the estimated impact on key economic indicators in Northern Grampians for February (pre-COVID-19), May and June 2020, as well as JobKeeper estimates. Council will continue to monitor the impacts.

Overall the figures so far show continued job losses and wages and salaries in June compared to May 2020. However losses in total value-added and output were not as significant in June compared to May.

- In Northern Grampians, for June 2020, value-added (\$) to the economy is estimated at \$48M, a fall of -15% of pre-COVID-19 value-added. In May the estimated fall in value-added to the economy represented -16.7% of pre COVID-19 figures.
- For June 2020, total employment is estimated at 4,589, a fall of -7.1% of pre-COVID-19 jobs. Employment in May was estimated to have decreased by -13.4% of pre-COVID-19 job numbers
- For June 2020, the total of wages and salaries is estimated at \$25M, a fall of -8.6%. In May a total loss of -\$3.3M in pre-COVID-19 wages and salaries was estimated.
- For June 2020, industry output is estimated at \$118M, a fall of -11.1%. In May the estimated fall represented -23.1% of pre COVID-19 output in Northern Grampians.
- It is estimated that 26.2% of local businesses have applied for JobKeeper, 63 local government areas in Victoria have more applications and 16 had less than Northern Grampians.



Forecasting the economic impacts of COVID-19 is difficult because we don't know exactly what is going to happen, and key factors are changing so frequently. Future economic impact depends on many global and local factors. What we can do is monitor and understand the economic impact of the pandemic as it unfolds, to build an evidence base for the economic recovery strategy.

Social Context

The size of Northern Grampians population is showing a slow decline, recording a slight annual decrease from year to year, Northern Grampians is one of just eleven regional Victorian municipalities projected to experience decreasing population over the next 20 years. This is in contrast to the growth outlook expected for regional Victoria overall. The age profile of the Shire is older than regional Victorian and Victorian averages, and this ageing structure will become more pronounced over the next twenty years. Although there is a depopulation trend in Northern Grampians, unlike many other rural communities across Australia with economics largely driven by agriculture, the Shire has been able to hold onto a relatively high proportion of the most productive age cohorts.

In 2016 Northern Grampians Shire, a higher rate of people did not change address (63.4%), while a lower rate (27.0%) moved from elsewhere in Australia, and a lower rate (1.5%) moved from overseas. Between 2011 and 2016, the city of Casey was where Northern Grampians received the highest net migration (+40), whilst the highest net loss (-226) was to Ballarat. In 2016, the age group with the highest net migration to Northern Grampians Shire was persons aged 55 to 64 years.

The number of children and young people in education has also fallen since 2011, with implications for the future regional workforce.

The data shows a positive trend towards higher educational attainment and levels of education. In 2016, the proportion of the population with tertiary educational attainment was significantly lower than for the rest of the state. However, unlike many other rural communities across Australia, the Shire has relatively good retention of secondary and even tertiary aged residents which is a welcome trend. The younger worker cohort and those in their most productive age group (Parents and Homebuilders) appear to be attracted to Northern Grampians and many appear to stay. That said, Parents and Homebuilders are also the cohort most likely to leave.

As of 2019, Northern Grampians had an unemployment rate of 4.6%. Like many rural, regional and remote communities, the unemployment rate is relatively low, however has increased since 2013. In 2016 it was estimated that the total Northern Grampians Shire labour force comprised 5119 individuals, of which 4856 or 94.9 % were employed. Of the labour force, 54.6 % was engaged in full time work, while 38.1 % were engaged in part time work. Since the 2011 census the proportion of those engaged in full time work has fallen slightly, while the proportion in part time work has increased.

The most common occupations in Northern Grampians included Managers 19.0%, Labourers 17.4%, Community and Personal Service Workers 14.2%, Professionals 11.9%, and Technicians and Trades Workers 11.8%. The largest growth in occupation numbers has been in Aged and Disabled Care workers, reflecting the ageing population in the region.

The percentage of Northern Grampians population with internet access was lower than that of the wider Grampians Region and Victorian population. Northern Grampians also have a high percentage of people who don't have the internet from their dwelling.

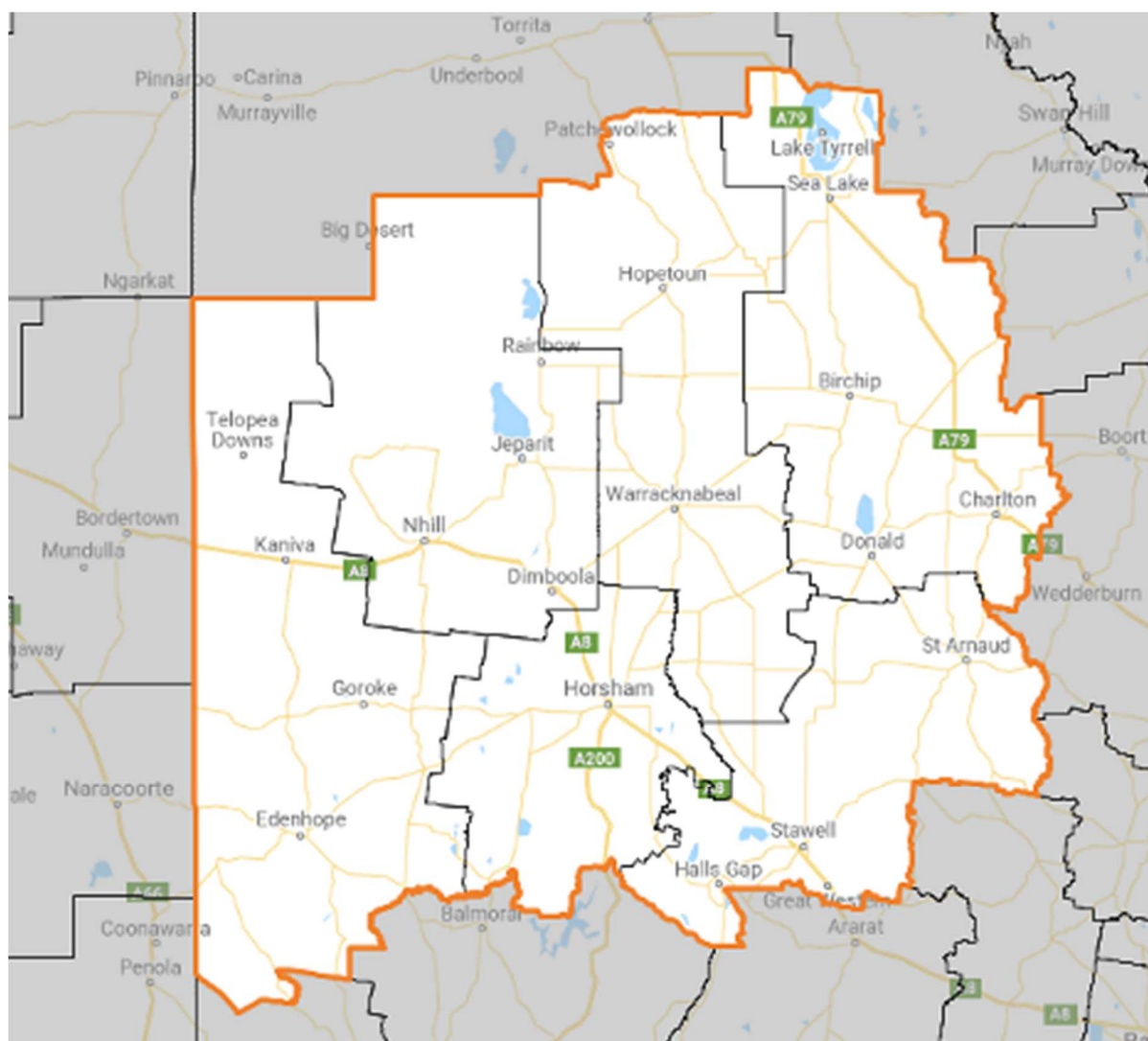
The SEIFA calculation shows that Northern Grampians Shire is among the most disadvantaged in Victoria, at the 17th percentile. A low SEIFA score indicates relatively greater disadvantage in general. Northern Grampians Ranks 135 out of 544 local government areas with SEIFA scores in Australia.

3. Focus area

Northern Grampians Shire is located in Victoria's central west; 110 kilometres west of Ballarat and 220 kilometres north west of Melbourne. It is also at the south-east of Victoria's Wimmera Southern Mallee region.

Northern Grampians is bounded by Buloke Shire in the north, Loddon Shire and Central Goldfields Shire in the east, Pyrenees Shire, Ararat Rural City and Southern Grampians Shire in the south, and Horsham Rural City and Yarriambiack Shire in the west.

Northern Grampians' major towns Stawell in the south and St Arnaud in the north, both service centres for their surrounding rural communities. Smaller townships include Great Western, Halls Gap, Glenorchy, Navarre, Marnoo and Stuart Mill.



Wimmera Southern Mallee



Wider Grampians region map



4. Northern Grampians Economic Context

4.1. Overview of key economic indicators

	Northern Grampians	Grampians Region	Victoria
Gross Regional Product	\$730M	\$14,152M	\$454,590M
Value-added	\$682M	\$12,944M	\$423,628M
Exports	\$704M	\$7,070M	\$114,270M
Local sales	\$401M	\$8,572M	\$377,777
Jobs	4,940	92,613	2,730,332
Wages and Salaries	\$332M	\$6,655M	\$220,353M
BS 2019 Estimated Residential Population:	11,402	250,959	6,596,039
ABS Census Place of Usual Residence Population:	11,436	236,744	5,926,624
Annualised Population Growth Rate (2011–2016):	-0.7%	1.4%	2.1%
Land Area (ha):	572,987.64	4,862,647.17	22,749,563.04
Census Population Density (persons / ha):	0.02	0.05	0.26
Median Age:	48 years	42 years	37 years
Median Weekly Income:	\$513 (\$26,674 pa)	\$580 (\$30,177 pa)	\$644 (\$33,556 pa)
Labour Force Participation Rate:	44.77%	46.75%	49.43%

Table 1: Overview of key economic indicators

4.2. Gross Regional Product

Gross Regional Product (GRP) is the total amount of wealth generated by businesses, organisations and individuals working in the area. Changes GRP over time can represent changes in employment, productivity or the types of industries in the area. GRP is often used to illustrate the size of a regional economy in order to promote a region's investment appeal, however GRP estimates do not fully capture the contribution of a region to the economy.



In 2019 Northern Grampians' GRP was estimated at \$6730M. GRP has increased from around \$630M in 2014 despite unfavourable population factors and drought conditions. GRP data shows that Northern Grampians GRP hasn't grown in line with the broader Grampians region, or with Victoria. Since 2008 Victoria's GRP increased by 35% in real terms, and Grampians region GRP by 27%. Over the same period, Northern Grampians GRP basically remained the same. GRP declined significantly in Northern Grampians between 2011 and 2016 primarily due to the closure of the Stawell Gold Mine and flow on impacts for the region.

Year	Northern Grampian \$M	Grampians Region \$M	Victoria \$M
2008	\$753	\$10,918	\$330,168
2009	\$819	\$11,606	\$354,736
2010	\$843	\$11,286	\$348,912
2011	\$858	\$11,550	\$356,353
2012	\$715	\$10,844	\$369,484
2013	\$728	\$10,842	\$370,980
2014	\$670	\$11,118	\$373,832
2015	\$676	\$11,258	\$378,997
2016	\$744	\$12,469	\$389,605
2017	\$659	\$12,775	\$414,971
2018	\$703	\$13,403	\$430,504
2019	\$730	\$13,930	\$447,462

Table 2: Northern Grampians Real GRP, compared to the Grampians region and Victoria (June 2018 Prices)

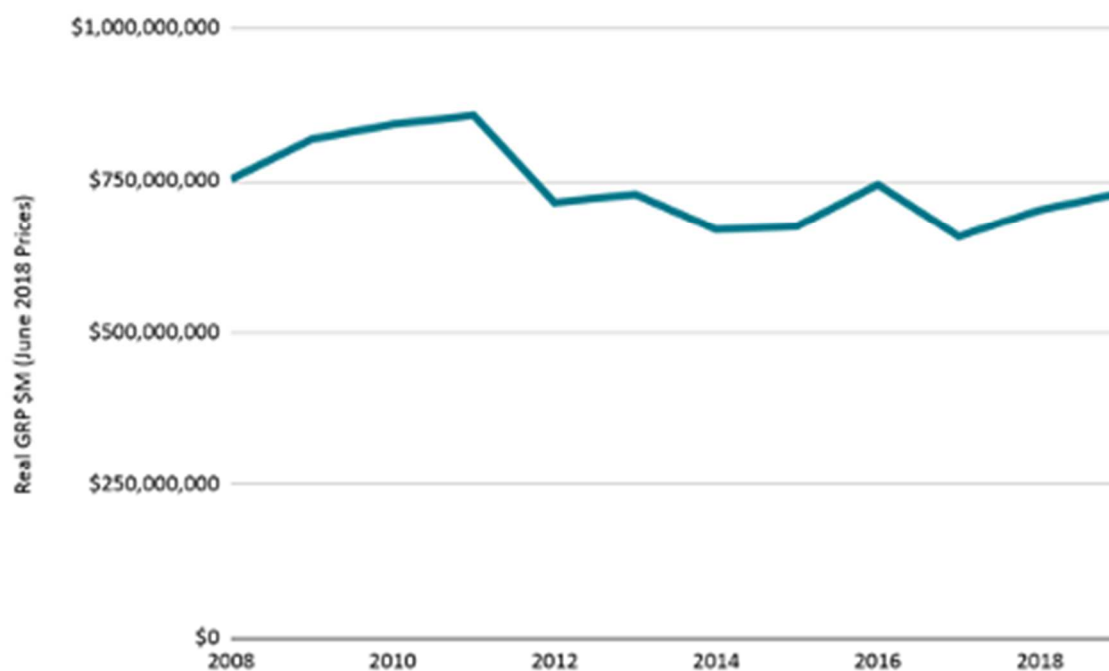


Figure 1: Northern Grampians Real GRP (June 2018 Prices)

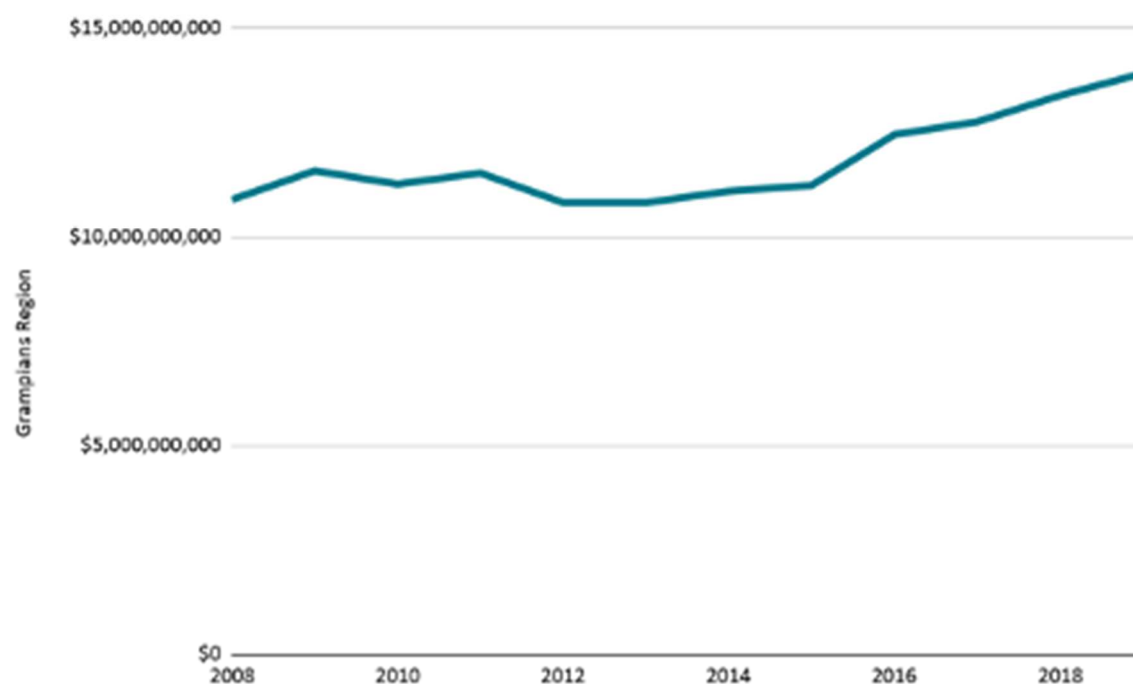


Figure 2: Grampian Regions Real GRP (June 2018 Prices)

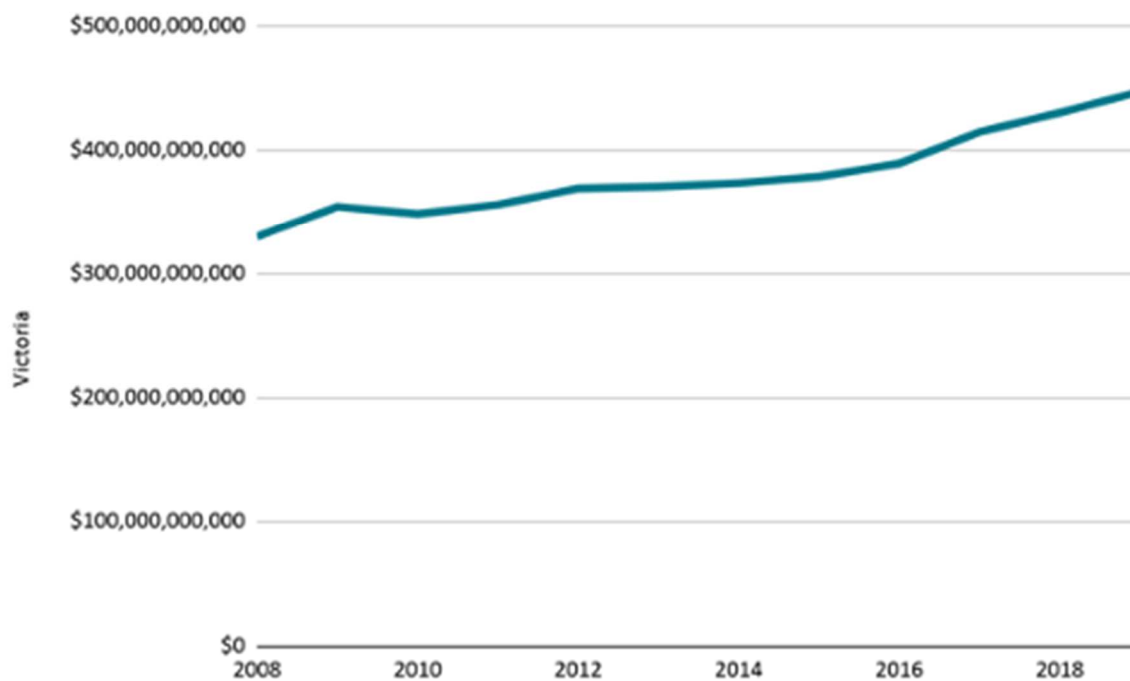


Figure 3: Victoria's Real GDP (June 2018 Prices)

4.3. Value-added

One of the key outcomes of economic development is growth, and value-added is a key economic measure of growth. Value-added tells us how much wealth each business, and collectively the region, is generating at any point in time. It is different from income or turnover, which includes the cost of inputs.

Value is added to our economy when intermediate (raw) goods or services produced in Northern Grampians are purchased and processed in some way by another business in Northern Grampians. The resulting product is resold by that business, outside Northern Grampians. This process represents value-added (\$) to our economy. Every time value is added to goods or services produced in NG, jobs are created, and wages/salaries are spent on other services in Northern Grampians (e.g. retail).

1. Intermediate (raw) goods/services are purchased
2. processed
3. resold outside

= value-added (\$) to NG economy

Everytime value is added to goods unique to NG, jobs are created and wages/salaries are spent on other services (e.g. retail)



Figure 4: Value-added outline

Formally value-added equals wages/salaries plus profits plus tax.

The total value-added estimate for Northern Grampians in 2019 was \$682M.

In 2019 the most significant industries in terms of total value-added to the Northern Grampians economy were Sheep and Grain (12%), Gold Mining (Non Ferrous Metal Ore Mining) (9.3%) and Meat and Meat Product Manufacturing (7.1%). Over the ten year period from 2010-2019 the highest total amount (\$M) of value-added came from Mining (17%), Sheep and Grain (9.1%) and Health Care Services (7%).

When looking at value-added in 2019 compared to 2010 Sheep and Grain was up by 47%, Gold Mining (Non Ferrous Metal Ore Mining) was down by -63% and Meat and Meat Product Manufacturing was up by 131% in 2019 compared to 2010.

In terms of the strongest percentage growth in 2019 compared to 2010 by far the strongest increase was in 'Other Agriculture' (including vegetable, grape, olive and turf growing and nursery production), which grew by 484% in 2019 compared to 2010. This was followed by library and other Information Services (283%), Construction (204%) and Non Metallic Mineral Mining (167%). Other high growth industries in percentage terms included Heavy and Civil Engineering Construction (158%), Residential Care and Social Assistance Service (133%), Bakery Product Manufacturing (125%) and Poultry and Other Livestock (116%).

Value-add in 2019

The top ten industry sectors contributed over 65% of the total value-added to the Northern Grampians economy in 2019 (release 1 data).

Appendix 11.1 provides a breakdown of the value-added by industry sectors in 2019.

Industry Sector	Northern Grampians (2019 Release 1) (%m)
Sheep, Grains, Beef & Dairy Cattle	\$71.1170
Non Ferrous Metal Ore Mining	\$55.4157
Meat & Meat Product Manufacturing	\$42.2725
Health Care Services	\$41.9059
Residential Care & Social Assistance Services	\$36.2195
Retail Trade	\$34.0994
Public Administration & Regulatory Services	\$32.3108
Education & Training	\$27.6430
Construction Services	\$25.3269
Poultry & Other Livestock	\$24.7315

Table 3: Top Performing sectors in 2019 for value-added (114 sectors)

Change in value-added over time

Based on value-added data from 114 sectors in Northern Grampians over a ten year period, sectors shown in Table 4 made the greatest contribution in the total value added, delivering 65% of the total over the ten year period from 2010-2019. Appendix 11.2 provides a full breakdown.

Industry Sector	Total Value-added over 10 years (2010-2019) (\$M)	Percentage of total VD over 10 years
Non Ferrous Metal Ore Mining	\$941.36	16.85%
Sheep, Grains, Beef & Dairy Cattle	\$508.71	9.10%
Health Care Services	\$367.24	6.57%
Retail Trade	\$329.00	5.89%
Public Administration & Regulatory Services	\$306.93	5.49%
Meat & Meat Product Manufacturing	\$268.36	4.80%
Education & Training	\$248.91	4.45%
Residential Care & Social Assistance Services	\$237.32	4.25%
Wholesale Trade	\$187.86	3.36%
Finance	\$161.76	2.89%
Poultry & Other Livestock	\$161.18	2.88%

Table 4: Total Value-added over 10 years (2010-2019)

Table 1Table 5 shows the difference in value-added (\$M) when comparing the total in 2010 with the total in 2019 (\$M). Appendix 11.3 provides a breakdown of all sectors.

Industry Sector	Difference in Value-added comparing 2010 to 2019 (\$M)
Meat & Meat Product Manufacturing	\$24.05
Sheep, Grains, Beef & Dairy Cattle	\$22.88
Residential Care & Social Assistance Services	\$20.68
Construction Services	\$17.02
Poultry & Other Livestock	\$13.32
Health Care Services	\$10.19
Food & Beverage Services	\$6.79
Administrative & Support Services	\$6.16
Other Agriculture	\$5.67
Heavy & Civil Engineering Construction	\$4.26

Table 5: Difference in Value-added comparing 2010 to 2019 (\$M)

Industry Sector	% difference b/t the total in 2019 & 2010
Other Agriculture	484.25%
Library & Other Information Services	283.99%
Construction Services	204.82%
Non Metallic Mineral Mining	167.40%
Heavy & Civil Engineering Construction	158.46%
Water Supply, Sewerage & Drainage Services	157.16%
Residential Care & Social Assistance Services	133.04%
Meat & Meat Product Manufacturing	131.96%
Bakery Product Manufacturing	125.47%
Poultry & Other Livestock	116.80%
Food & Beverage Services	80.19%

Table 6: Percentage difference of 114 sectors in value-added when comparing the total in 2010 to 2019 (\$M)

Table 7 shows growth trends in value-added (\$M) over three time periods of 114 industry sectors – the ten years since 2010/19, the five years since 2015/19, and the two years since 2018/19. Appendix 11.4 provides a full breakdown of value-added for 114 sectors over those time periods.

Industry Sector	Number of growth years over 10 year period (2010-2019)	Number of growth years over 5 year period (2019-2015)	Number of growth years over 2 year period (2019-2018)
Construction Services	10	5	2
Other Agriculture	10	5	2
Residential Care & Social Assistance Services	9	5	2
Health Care Services	9	4	2
Water Supply, Sewerage & Drainage Services	9	5	2
Non-Residential Property Operators & Real Estate Serv.	9	4	2
Non Metallic Mineral Mining	9	5	2
Library & Other Information Services	9	5	2
Poultry & Other Livestock	8	5	2
Administrative & Support Services	8	5	2
Retail Trade	8	4	2
Finance	8	4	2
Public Order & Safety	8	5	2
Aircraft Manufacturing	8	4	2
Professional, Scientific & Technical Services	8	4	2
Wholesale Trade	8	4	2
Meat & Meat Product Manufacturing	7	5	2
Sheep, Grains, Beef & Dairy Cattle	7	4	2
Food & Beverage Services	7	4	2
Heavy & Civil Engineering Construction	7	3	2
Public Administration & Regulatory Services	7	4	2
Agriculture, Forestry & Fishing Support Services	7	5	2
Accommodation	7	3	2
Bakery Product Manufacturing	7	4	2
Other Food Product Manufacturing	7	4	2
Other Repair & Maintenance	7	4	2
Computer Systems Design & Related Services	7	4	2
Personal Services	7	4	2
Automotive Repair & Maintenance	7	4	2
Postal & Courier Pick-up & Delivery Service	7	5	2
Waste Collection, Treatment & Disposal Services	7	4	2
Heritage, Creative & Performing Arts	7	5	2
Publishing (except Internet & Music Publishing)	7	3	2
Polymer Product Manufacturing	7	4	2
Non Ferrous Metal Ore Mining	7	4	2

Table 7: Industry sector growth years over three time periods in Northern Grampians (114 sector level).

Table 8 and Table 9 look at Northern Grampians industry sectors in broader categories (19 sector level), to capture the value-added by sectors that make up Tourism. Sectors that are widely recognised as being driven in part by the visitor economy, including retail, accommodation and food services, arts and recreation services have been amalgamated to capture the value added by the visitor economy.

Industry Sector	% Difference b/t the total in 2019 & 2010
Construction	120.18%
Electricity, Gas, Water & Waste Services	75.05%
Accommodation & Food Services	70.78%
Agriculture, Forestry & Fishing	69.13%
Health Care & Social Assistance	66.36%
Administrative & Support Services	49.93%
Ownership of Dwellings	43.47%
Rental, Hiring & Real Estate Services	42.43%
Tourism	33.19%
Financial & Insurance Services	27.09%

Table 8: Percentage difference of 19 sectors in value-added when comparing the total in 2010 to 2019 (\$M)

Industry Sector	(2010-2019) 10 year period (no. of growth years)	(2019-2015) Total \$ 5 year period (no. of growth years)	(2019-2018) Total \$ 2 year period (no. of growth years)
Construction	10	5	2
Electricity, Gas, Water & Waste Services	9	5	2
Health Care & Social Assistance	9	5	2
Professional, Scientific & Technical Services	9	4	2
Agriculture, Forestry & Fishing	8	5	2
Ownership of Dwellings	8	4	2
Rental, Hiring & Real Estate Services	8	4	2
Tourism	8	4	2
Financial & Insurance Services	8	4	2
Retail Trade	8	4	2
Transport, Postal & Warehousing	8	4	2
Wholesale Trade	8	4	2
Information Media & Telecommunications	8	4	2
Accommodation & Food Services	7	3	2
Administrative & Support Services	7	4	2
Public Administration & Safety	7	4	2
Education & Training	7	4	2
Other Services	7	4	2
Manufacturing	7	4	2
Mining	7	4	2
Arts & Recreation Services	5	4	2

Table 9: Industry sector growth years over three time periods in Northern Grampians (19 sector level).

4.4. Exports: Goods and services produced in NG and sold outside NG

Table 13 shows regional exports data at the 114 sector level. Regional exports represent the value (\$) of goods and services sold (exported) outside of Northern Grampians that have been generated by businesses or organisations within Northern Grampians. Another way of defining exports is as an inflow of money into the region. Exports mean sales to other parts of Australia and overseas.

The total regional export estimate for Northern Grampians in 2019 was \$704M.

In 2019 the Meat and Meat Product Manufacturing industry accounted for just over 30% of goods sold outside Northern Grampians. Non Ferrous Metal Ore Mining made up 27% in 2019. Sheep and Grains exported close to 10% of total exports in 2019. The Accommodation industry accounted for \$34M in money that flowed into the Northern Grampians economy. Basic Chemical Manufacturing drew \$29M into the Northern Grampians economy.

4.5. Local sales

Table 13 also shows the value of goods and services produced in Northern Grampians, which are sold to local industry sectors as input into production and for value-adding. Local sales data represents the value of goods and services produced in the Northern Grampians region sold to local industry sectors as intermediate inputs into production, and for further value-adding. The total value of local sales for an industry sector relative to exports provides insights into the degree to which the industry is dependent on local demand versus the demand from outside of the region.

Regional local sales estimate for Northern Grampians 2019 was \$401M.

The Sheep and Grain sector account for the great total amount of local sales (\$100M in 2019) followed by construction services (\$51M), poultry and other livestock (\$24M) and Professional, Scientific and Technical Services (\$16M).



4.6. Productivity

Productivity data in Table 13 represents the value-added (\$M) by industry sector, per worker, in Northern Grampians. Economic productivity measures output relative to labour, capital or any other resource. It is typically calculated for the economy in its entirety, as ratios of value-added to employment and to hours worked. Labour productivity may be further broken down by sector to examine trends in labour growth, wage levels, education and experience of the workforce, supply chain logistics and technological improvement. Industries' and regions' productivity are a key factor in attracting investment and creating jobs.

Average productivity in Northern Grampians in terms of value-added per worker was estimated at \$0.121M in 2019.

Productivity data shows that per worker, the finance sector contributed the most value-added to the Northern Grampians economy at \$0.62M per worker. Other industries among the most productive were Aircraft Manufacturing contributed \$0.43M per worker, Cement, Lime & Ready-Mixed Concrete Manufacturing \$0.36M per worker, Non Ferrous Metal Ore Mining \$0.31M per worker and Basic Chemical Manufacturing \$0.3M per worker.



4.7. Wages and Salaries

Wages and salaries in this report refers to the value of entitlements earned by employees from their employers for services rendered, includes wages and salaries received by employees in cash and in kind (e.g. provision of food, accommodation or motor vehicles), and employers' social contributions such as superannuation contributions and workers' compensation premiums.

In 2019 the total wages and salaries paid to employees in Northern Grampians was \$332M.

Some studies have found a positive correlation between the value of wages and salaries and economic growth. The theory is that industries that attract higher wages and salaries create a higher demand for local goods and services, through more money being spent in the local community and therefore more sophisticated goods and services being produced. That's good not just for consumers and producers, but for the overall economy, because producing and selling more, higher-value things makes everyone more productive, and therefore helps increase overall standards of living.

Based on 2019 figures, jobs in Health Care Services delivered the greatest in total wages and salaries (\$33.5 M), Residential Care and Social Assistance Services accounted for slightly more (\$33.1M), Meat and Meat Product Manufacturing made up \$28M, Public Administration and Regulatory Services totalled \$27M, followed by Non Ferrous Metal Ore Mining (\$23M).

4.8. Jobs

Employment numbers represent total numbers of people employed in each sector (without conversions to full-time equivalence). Table 13 provides a breakdown of jobs per sector.

In 2019 4,940 people were employed in Northern Grampians.

Based on 2019 figures, the sheep and grains industry provided the greatest number of jobs in Northern Grampians (521). Health Care services employed 486 people, retail delivered 475 jobs, Meat and Meat Product Manufacturing jobs totalled 422 jobs, Residential Care and Social Assistance Services employed 378 people, followed by food and beverage services employing 271 people.

Table 12 shows that the Shire's employment distribution by the five broad industry groupings is similar to the national average, with two important exceptions:

- Primary industries (agriculture and mining) which, unsurprisingly, are around 4 times greater in Northern Grampians than the national average; simply a reflection of the vast rural sections of the Shire. These are among the Shire's highest comparative advantage sectors.
- Quaternary industries (services to business/organisations) which are under-represented in the Shire and are target areas for economic development. The Shire is not yet a destination of choice for the key sectors of professional, scientific and professional services, information, media and telecommunications services, financial and insurance services, and education and training services. These are among the Shire's highest comparative disadvantage sectors.



5. Specialisation, driving sectors and trends in industry mix

The key economic indicators presented above were used to identify:

- Industries that have a higher concentration and are more specialised in the Northern Grampians economy compared to the rest of Australia
- Industry sectors that were driving our economy pre-COVID-19
- How our industry mix is shifting compared to the National economy

5.1. Specialisation and concentration

Location quotient (LQ) is a method used to identify what industries or occupations have a higher concentration and are more specialised in the Northern Grampians economy compared to the rest of Australia. It is a technique used for assessing a location/region's specialisation in an industry. Essentially, LQs measure the proportion (or importance) of local employment in the industry sector compared to that of Australia. The following LQ analysis compares Northern Grampians with the rest of Australia.

The location quotient is determined by comparing an industry's share of regional employment with its share of National employment. An industry value of less than 1 indicates a low proportion of employment within that industry in Northern Grampians compared to Australia. Industries with a high location quotient are important from a workforce perspective. A value greater than 1 represents a higher proportion of employment in Northern Grampians and that the region is likely to have a competitive advantage in that field of industry.

The LQ analysis in Table 10 shows that the relative strengths of Northern Grampians lie in Mining, Agriculture, Arts and Recreation Services, and Manufacturing, Health care and social assistance and Accommodation and food services.

The industries which are underrepresented in Northern Grampians include the professional office based sectors which are more likely to be located in larger regional centres (e.g. Professional, Scientific and Technical Services, and Finance). Construction and Transport, Postal and Warehousing are also underrepresented in the local economy.

The LQs fluctuates depending on what is happening in both Northern Grampians economy and that of Australia. Change in LQ from 2006-2011 shows that in Northern Grampians the mining sector has grown in importance to local employment compared to the overall Australian economy over that period. Agriculture has become more concentrated in Northern Grampians compared to the overall Australian economy from 2011-2016. In the overall Australian economy Agriculture is a relatively modest employer but in the Northern Grampians Economy it is dominant.

Table 10 shows sectors that have a level of specialization in Northern Grampians compared to the wider Australian economy. Location Quotient Northern Grampians 2016 (Compared With the rest of Australia). Sectors with a score of greater than 1.

Industry of employment	2016 Location Quotient	2011 Location Quotient	2006 Location Quotient	Change from 2006- 2011	Change from 2011- 2016
Agriculture, forestry and fishing	5.22	5.37	4.54	-0.83	0.15
Mining	2.22	3.21	4.06	0.85	0.99
Arts and recreation services	1.37	1.27	1.67	0.40	-0.10
Manufacturing	1.87	1.29	1.35	0.06	-0.58
Health care and social assistance	1.35	1.29	1.20	-0.08	-0.06
Accommodation and food services	1.23	1.36	1.14	-0.22	0.13
Public administration and safety	0.94	0.95	0.98	0.03	0.01
Retail trade	0.96	1.07	0.98	-0.09	0.11
Education and training	0.66	0.75	0.83	0.08	0.09
Administrative and support services	0.64	0.65	0.71	0.06	0.01
Transport, postal and warehousing	0.55	0.51	0.62	0.11	-0.04
Electricity, gas, water and waste services	0.55	0.51	0.60	0.09	-0.04
Wholesale trade	0.53	0.64	0.53	-0.11	0.11
Construction	0.52	0.47	0.41	-0.06	-0.05
Rental, hiring and real estate services	0.41	0.41	0.39	-0.02	0.00
Professional, scientific and technical services	0.30	0.36	0.37	0.02	0.06
Financial and insurance services	0.20	0.23	0.26	0.02	0.03
Information media and telecommunications	0.42	0.26	0.21	-0.05	-0.16

Table 10: Location Quotient Northern Grampians 2016 (Compared With the rest of Australia)

5.2. Current Driving Industries

Economic drivers in the Northern Grampians economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) are detailed in Table 11. Backward linkages refer to the industry sectors which spend the most on locally sourced intermediate goods and services per dollar of output.

These industry sectors may not necessarily make the largest contributions to the region's at present however due to well-developed local supply chains these sectors have a significant capacity to deliver broad-based economic benefits for the region.

Table 11 shows sectors that are within the top 30 (of 114 sectors) for all key economic indicators. Sectors that are in the top 30 for all indicators are considered to be driving sectors due to the contribution made to economic activity in the Northern Grampians Region in relation to backward linkages, exports, employment, and value-added.

Appendix 11 provides full industry breakdowns.

Industry Sectors	Backward Linkages	Exports	Employment	Value Added	Total	Key
Sheep, Grains, Beef & Dairy Cattle	Yes	Yes	Yes	Yes	4	Yes
Poultry & Other Livestock	Yes	Yes	Yes	Yes	4	Yes
Agriculture, Forestry & Fishing Support Services	Yes	Yes	Yes	Yes	4	Yes
Non Ferrous Metal Ore Mining	Yes	Yes	Yes	Yes	4	Yes
Meat & Meat Product Manufacturing	Yes	Yes	Yes	Yes	4	Yes
Other Food Product Manufacturing	Yes	Yes	Yes	Yes	4	Yes
Food & Beverage Services	Yes	Yes	Yes	Yes	4	Yes
Road Transport	Yes	Yes	Yes	Yes	4	Yes
Building Cleaning, Pest Control and Other Support Services	Yes	Yes	Yes	Yes	4	Yes

Table 11: Key propulsive industries in NGS

5.3. Change in industry mix

National trends

To understand structural changes in the economy over time, 114 industries can be grouped into five sectors, that broadly describe the nature of the economic contribution and the jobs offered by each sector.

These are:

- **Primary Sector** (agriculture, fishing, forestry and mining industries): This sector generates products from the earth's natural resources.
- **Secondary Sector** (manufacturing, construction, electricity, gas, water and waste): This sector transforms and adds value to natural resource products.
- **Tertiary Sector** (retail trade, wholesale trade, transport, postal and warehousing): This sector provides services which deliver products to consumers.
- **Quaternary Sector** (finance, real estate, information/media, professional/technical/scientific, administrative, and education services): This sector delivers services targeted largely to businesses, and other organisations.
- **Quinary Sector** (health, accommodation and food services, art and recreation, other personal services): This sector delivers services targeted largely to individuals.

Nationally, the three earlier sectors are reducing in relative terms within the economy: primary sector (agriculture and mining), the secondary sector (manufacturing, construction and utilities), and the tertiary sector (wholesaling, retailing and transport).

In 2016 Nationally:

- The primary, secondary and tertiary sectors 39.4% of all jobs
- The quaternary sector (education, finance, business services, communications) reached 49.7% of gross domestic product (GDP) and contributed 34.5% of all jobs
- The quinary sector (health, hospitality, cultural and personal services) rose to 11.8% of GDP and now provides 26.1% of all jobs.

Until the COVID pandemic, more wealth (GDP) was being created from tourism (domestic and international) in Australia than agriculture.

How National jobs trends compare to Northern Grampians

The situation in Northern Grampians is somewhat different as summarised in Table 12. However, the data also shows Northern Grampians economy is shifting in the same direction in terms of jobs and value-added, with the quaternary and quinary sectors now accommodate nearly half of all jobs in the Shire and about half of value added, with:

- Primary Sector making up 16.7% of jobs and contributing 24.5% of value added
- Secondary Sector making up 18.1% of jobs and contributing 17.4% of value added
- Tertiary Sector making up 14.5% of jobs and contributing 9.0% of value added
- Quaternary Sector making up 21.4% of jobs and contributing 30.7% of value added
- Quinary Sector makes up 29.4% of jobs and contributes 18.5% of value added.



		Northern Grampians 2016 Employment by Industry		Northern Grampians 2019 Output and Value Added by Industry		
Sector	Industry	Number of Jobs in the Shire	% of Total Jobs	Output (\$M)	% of Total Output	Value Added (\$000)
Primary Sector (Products from natural resources)	Agriculture, Forestry and Fishing	635	13.1%	\$230.7	14.5%	\$108.2
	Mining	145	3.0%	\$195.0	12.3%	\$58.7
	Total Primary Sectors	780	16.67%	\$425.7	26.8%	\$167.0
Secondary Sector (Production from transforming and value adding to natural resources)	Manufacturing	539	11.1%	\$378.6	23.9%	\$73.9
	Electricity, Gas, Water and Waste Services	41	0.8%	\$17.1	1.1%	\$8.3
	Construction	269	5.5%	\$112.2	7.0%	\$36.7
	Total Secondary Sectors	849	18.1%	\$507.9	32.0%	\$118.9
Tertiary Sector (Services which deliver products to consumers)	Wholesale Trade	87	1.8%	\$28.4	1.8%	\$14.7
	Retail Trade	436	9.0%	\$55.8	3.5%	\$34.1
	Transport, Postal and Warehousing	153	3.1%	\$28.3	1.8%	\$12.3
	Total Tertiary Sectors	676	14.5%	\$112.5	7.1%	\$61.2
Quaternary Sector (Services targeted largely to businesses, and other organisations)	Information Media and Telecommunica tions	12	0.2%	\$3.8	0.2%	\$2.0
	Financial and Insurance Services	41	0.8%	\$26.2	1.7%	\$20.0
	Rental, Hiring and Real Estate Services	29	0.6%	\$128.7	8.1%	\$92.9
	Professional, Scientific and Technical Services	118	2.4%	\$23.7	1.5%	\$11.7
	Administrative and Support Services	114	2.3%	\$18.9	1.8%	\$2.4
	Public Administration and Safety	380	7.8%	\$61.4	3.9%	\$38.8
	Education and Training	306	6.3%	\$37.8	2.4%	\$27.6

	Total Quaternary Sectors	1,000	21.4%	\$310.6	19.6%	\$209.5
Quinary Sector (Services targeted largely to individuals or groups of individuals)	Health Care and Social Assistance	778	16.0%	\$113.1	7.1%	\$78.1
	Accommodation and Food Services	371	7.6%	\$75.1	4.7%	\$29.5
	Arts and Recreation Services	92	1.9%	\$20.4	1.3%	\$7.6
	Other Services	113	2.7%	\$21.8	1.4%	\$10.7
	Total Quinary Sector	1,374	29.4%	\$230.4	14.5%	\$125.9
All Sectors	All Industries	4,679	100.00%	\$1,587.1	100.00%	\$682.5

Table 12: Employment and Output by Sector and Industry, Northern Grampians

SOURCE: Australian Bureau of Statistics, Census of Population and Housing, 2016, Working Population Profile Remplan Economy data

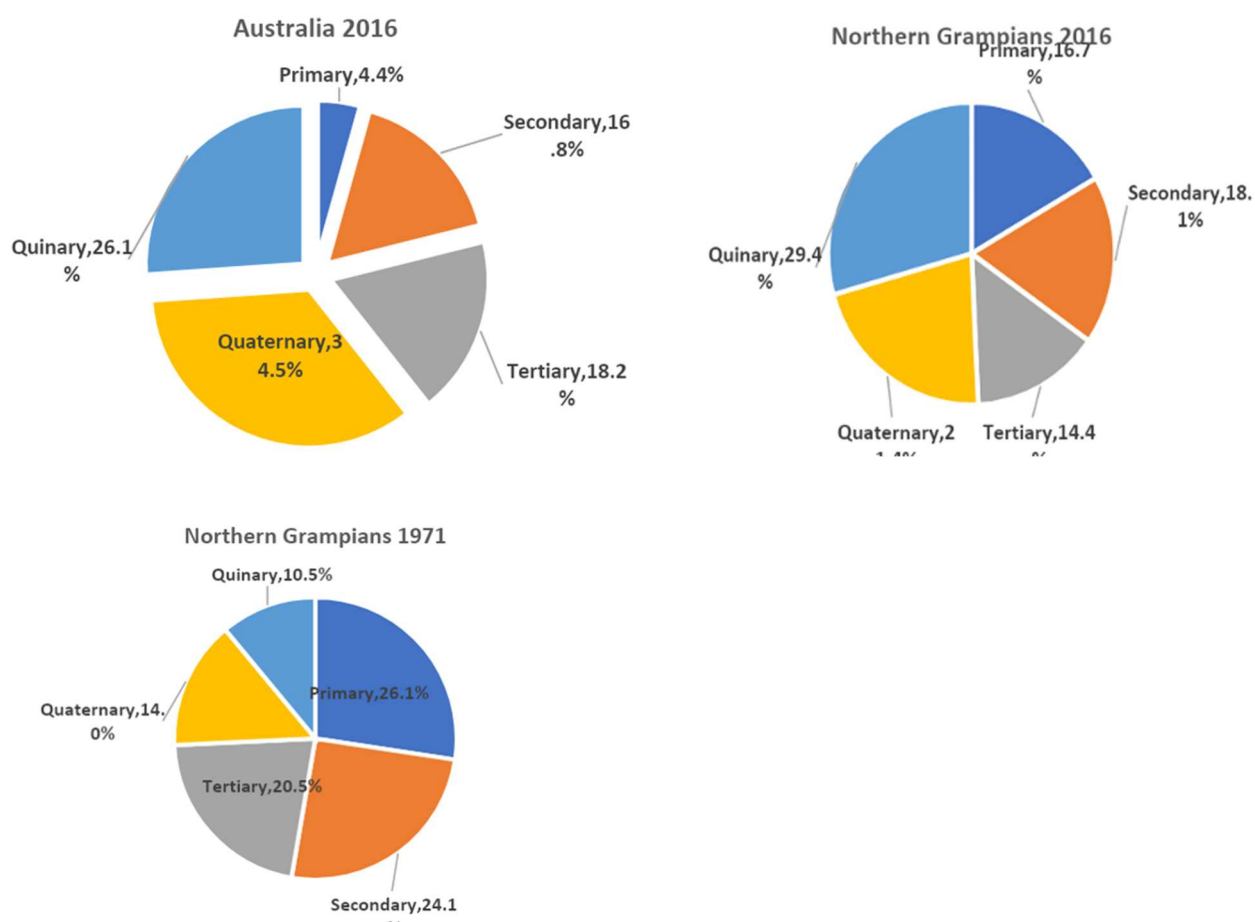


Figure 5: Changing Employment by Sector, Northern Grampians

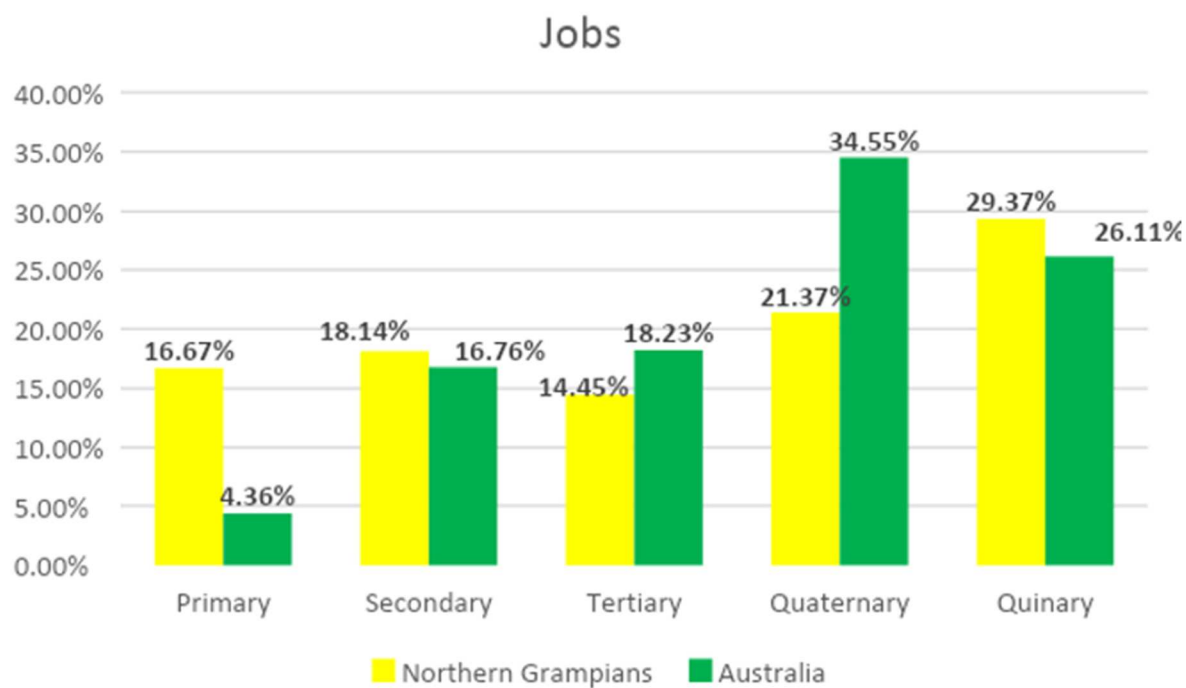


Figure 6: Relative Employment by Broad Grouping, 2016: Northern Grampians and Australia

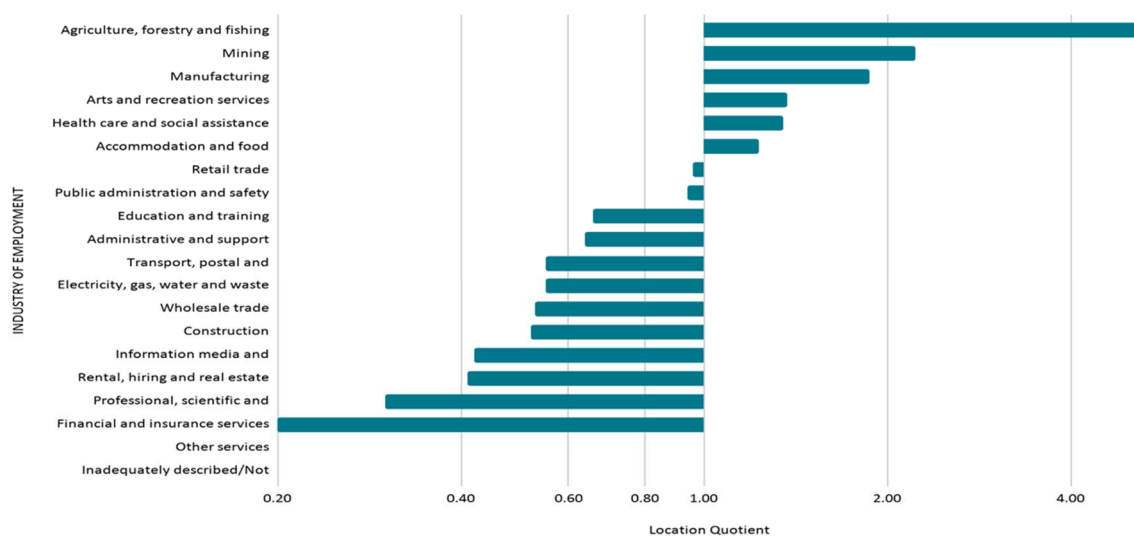


Figure 7: 2016 Location Quotient Northern Grampians (Compared With the rest of Australia)

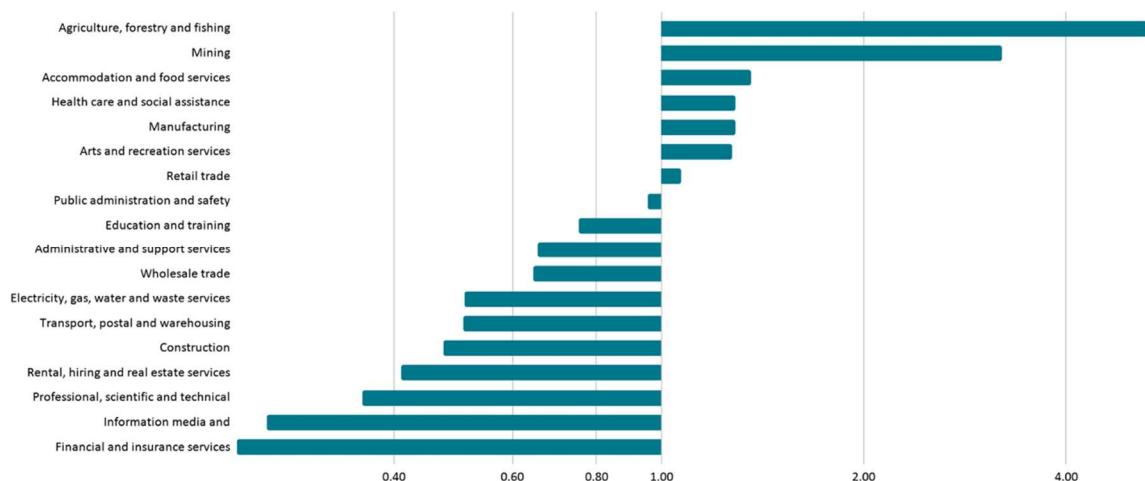


Figure 8: 2011 Location Quotient Northern Grampians (Compared With the rest of Australia)

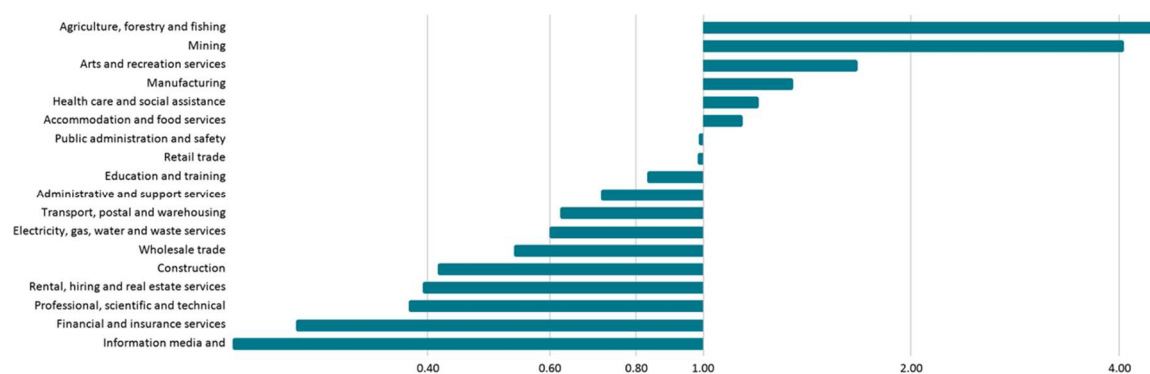


Figure 9: 2006 Location Quotient Northern Grampians (Compared with the rest of Australia)



Industry Sector	Value-added (\$M) (2019)	% of total value-added	Jobs (2019)	% of total jobs	Wages and Salaries (\$M) (2019)	% of total wages & salaries	Productivity (value-added per worker)	Exports (\$M)	% of total exports (\$M)	Local Sales
Sheep, Grains, Beef & Dairy Cattle	\$71.117	10.42%	521	10.55%	\$9.768	2.94%	\$0.137	\$59.62	8.47%	\$100.203
Non Ferrous Metal Ore Mining	\$55.416	8.12%	178	3.60%	\$23.670	7.13%	\$0.311	\$191.04	27.13%	\$1.052
Meat & Meat Product Manufacturing	\$42.272	6.19%	422	8.54%	\$27.806	8.37%	\$0.100	\$217.24	30.86%	\$8.723
Health Care Services	\$41.906	6.14%	486	9.84%	\$33.519	10.09%	\$0.086	\$9.72	1.38%	\$0.996
Residential Care & Social Assistance Services	\$36.219	5.31%	378	7.65%	\$33.168	9.99%	\$0.096	\$15.45	2.19%	\$0.481
Retail Trade	\$34.099	5.00%	475	9.62%	\$22.184	6.68%	\$0.072	\$2.82	0.40%	\$10.499
Public Administration & Regulatory Services	\$32.311	4.73%	255	5.16%	\$27.006	8.13%	\$0.127	\$15.32	2.18%	\$6.667
Pre-School, Primary, Secondary & Special Education	\$25.806	3.78%	261	5.28%	\$23.064	6.95%	\$0.099	\$3.66	0.52%	\$0.003
Construction Services	\$25.327	3.71%	194	3.93%	\$13.522	4.07%	\$0.131	\$1.76	0.25%	\$51.907
Poultry & Other Livestock	\$24.731	3.62%	100	2.02%	\$3.401	1.02%	\$0.247	\$13.99	1.99%	\$24.021
Finance	\$18.069	2.65%	29	0.59%	\$3.504	1.06%	\$0.623	\$2.68	0.38%	\$13.282
Food & Beverage Services	\$15.248	2.23%	271	5.49%	\$10.603	3.19%	\$0.056	\$3.66	0.52%	\$4.323
Wholesale Trade	\$14.740	2.16%	70	1.42%	\$9.184	2.77%	\$0.211	\$4.52	0.64%	\$12.542
Accommodation	\$14.294	2.09%	163	3.30%	\$7.764	2.34%	\$0.088	\$34.89	4.96%	\$1.997
Employment, Travel Agency and Other Administrative Services	\$11.950	1.75%	42	0.85%	\$10.507	3.16%	\$0.285	\$2.41	0.34%	\$15.337
Road Transport	\$9.925	1.45%	93	1.88%	\$5.873	1.77%	\$0.107	\$3.51	0.50%	\$11.654
Professional, Scientific & Technical Services	\$9.610	1.41%	73	1.48%	\$6.907	2.08%	\$0.132	\$0.77	0.11%	\$16.794
Other Food Product Manufacturing	\$7.628	1.12%	32	0.65%	\$3.260	0.98%	\$0.238	\$20.43	2.90%	\$6.578



Basic Chemical Manufacturing	\$7.006	1.03%	25	0.51%	\$3.866	1.16%	\$0.280	\$29.09	4.13%	\$12.208
Heavy & Civil Engineering Construction	\$6.942	1.02%	25	0.51%	\$3.529	1.06%	\$0.278	\$0.07	0.01%	\$2.553
Other Agriculture	\$6.837	1.00%	35	0.71%	\$1.334	0.40%	\$0.195	\$1.63	0.23%	\$8.289
Public Order & Safety	\$6.462	0.95%	59	1.19%	\$5.422	1.63%	\$0.110	\$0.12	0.02%	\$2.470
Water Supply, Sewerage & Drainage Services	\$6.447	0.94%	12	0.24%	\$1.644	0.50%	\$0.537	\$1.11	0.16%	\$3.901
Non-Residential Property Operators & Real Estate Serv.	\$6.161	0.90%	19	0.38%	\$1.813	0.55%	\$0.324	\$0.01	0.00%	\$10.307
Agriculture, Forestry & Fishing Support Services	\$5.552	0.81%	36	0.73%	\$2.381	0.72%	\$0.154	\$5.12	0.73%	\$10.854
Automotive Repair & Maintenance	\$4.513	0.66%	64	1.30%	\$2.948	0.89%	\$0.071	\$1.22	0.17%	\$3.658
Building Cleaning, Pest Control and Other Support Services	\$4.504	0.66%	91	1.84%	\$2.892	0.87%	\$0.049	\$1.88	0.27%	\$6.566
Residential Building Construction	\$4.464	0.65%	40	0.81%	\$1.880	0.57%	\$0.112	\$1.66	0.24%	\$4.813
Sports & Recreation	\$2.920	0.43%	50	1.01%	\$2.151	0.65%	\$0.058	\$0.82	0.12%	\$1.941
Heritage, Creative & Performing Arts	\$2.870	0.42%	47	0.95%	\$1.177	0.35%	\$0.061	\$2.88	0.41%	\$1.208
Other Services	\$2.791	0.41%	18	0.36%	\$2.176	0.66%	\$0.155	\$0.02	0.00%	\$0.224
Wine, Spirits & Tobacco	\$2.691	0.39%	29	0.59%	\$1.451	0.44%	\$0.093	\$9.84	1.40%	\$0.684
Aircraft Manufacturing	\$2.612	0.38%	6	0.12%	\$2.085	0.63%	\$0.435	\$10.04	1.43%	\$0.439
Ceramic Product Manufacturing	\$2.513	0.37%	16	0.32%	\$0.956	0.29%	\$0.157	\$9.71	1.38%	\$0.458
Postal & Courier Pick-up & Delivery Service	\$2.388	0.35%	37	0.75%	\$1.563	0.47%	\$0.065	\$1.81	0.26%	\$3.463
Non Metallic Mineral Mining	\$2.149	0.31%	11	0.22%	\$0.918	0.28%	\$0.195	\$3.13	0.44%	\$1.237



Computer Systems Design & Related Services	\$2.077	0.30%	13	0.26%	\$1.503	0.45%	\$0.160	\$0.22	0.03%	\$2.414
Bakery Product Manufacturing	\$1.997	0.29%	40	0.81%	\$1.750	0.53%	\$0.050	\$1.40	0.20%	\$1.240
Auxiliary Finance & Insurance Services	\$1.920	0.28%	7	0.14%	\$1.059	0.32%	\$0.274	\$0.52	0.07%	\$2.982
Waste Collection, Treatment & Disposal Services	\$1.897	0.28%	19	0.38%	\$1.189	0.36%	\$0.100	\$2.72	0.39%	\$3.309
Personal Services	\$1.800	0.26%	44	0.89%	\$1.262	0.38%	\$0.041	\$0.08	0.01%	\$0.833
Gambling	\$1.785	0.26%	10	0.20%	\$0.912	0.27%	\$0.178	\$1.69	0.24%	\$0.277
Rental & Hiring Services (except real estate)	\$1.698	0.25%	8	0.16%	\$1.061	0.32%	\$0.212	\$0.28	0.04%	\$5.046
Other Repair & Maintenance	\$1.561	0.23%	20	0.40%	\$0.973	0.29%	\$0.078	\$0.00	0.00%	\$3.866
Structural Metal Product Manufacturing	\$1.508	0.22%	7	0.14%	\$0.962	0.29%	\$0.215	\$0.16	0.02%	\$4.109
Library & Other Information Services	\$1.184	0.17%	10	0.20%	\$0.549	0.17%	\$0.118	\$0.95	0.14%	\$0.013
Exploration & Mining Support Services	\$1.154	0.17%	12	0.24%	\$0.673	0.20%	\$0.096	\$0.59	0.08%	\$1.565
Textile Product Manufacturing	\$1.124	0.16%	15	0.30%	\$0.626	0.19%	\$0.075	\$3.51	0.50%	\$1.284
Cement, Lime & Ready-Mixed Concrete Manufacturing	\$1.100	0.16%	3	0.06%	\$0.534	0.16%	\$0.367	\$1.77	0.25%	\$2.165
Polymer Product Manufacturing	\$1.090	0.16%	7	0.14%	\$0.686	0.21%	\$0.156	\$1.92	0.27%	\$2.756
Arts, Sports, Adult, Community & Other Education	\$0.944	0.14%	26	0.53%	\$0.566	0.17%	\$0.036	\$0.13	0.02%	\$0.134



Tech, Vocational & Tertiary Education (undergrad & postgrad)	\$0.893	0.13%	6	0.12%	\$0.797	0.24%	\$0.149	\$0.36	0.05%	\$0.100
Publishing (except Internet & Music Publishing)	\$0.843	0.12%	4	0.08%	\$0.445	0.13%	\$0.211	\$0.29	0.04%	\$1.267
Specialised & Other Machinery & Equipment Manu.	\$0.771	0.11%	8	0.16%	\$0.572	0.17%	\$0.096	\$0.31	0.04%	\$1.805
Iron & Steel Manufacturing	\$0.704	0.10%	8	0.16%	\$0.559	0.17%	\$0.088	\$0.64	0.09%	\$3.069
Other Non-Metallic Mineral Product Manufacturing	\$0.638	0.09%	5	0.10%	\$0.369	0.11%	\$0.128	\$0.92	0.13%	\$1.029
Furniture Manufacturing	\$0.216	0.03%	5	0.10%	\$0.136	0.04%	\$0.043	\$0.02	0.00%	\$0.257

Table 13: Summary of Jobs, wages and salaries against other key economic indicators for each industry sector in NGS based (2019 figures, 114 sector level).

6. Wimmera Southern Mallee Region (WSM)

Economic context

The information detailed in this section relates to industry sectors in the Wimmera Southern Mallee region, which includes the Local Government Areas of Horsham Rural City, Hindmarsh, Northern Grampians, West Wimmera, Buloke and Yarriambiack.

Table 15 shows that Northern Grampians has the most 'advanced' economy in the (Wimmera) region in terms of diversity and labour market distribution, second to the regional capital of Horsham Rural City.

WSM summary:

ABS 2019 Estimated Residential Population:	53,515
ABS 2016 Census Place of Usual Residence Population:	53,584
Land Area (ha):	4,195,523
Census Population Density (persons / ha):	0.013
Gross Regional Product (\$M):	\$3,601
Per Hectare Gross Regional Product (\$):	\$858
Per Capita Gross Regional Product (\$K):	\$67.20
Per Worker Gross Regional Product (\$K):	\$154
Total value-added	\$3,322M
Total jobs	23,360

Table 14: WSM Summary

Municipality	Number of Industries out of 114	Value-added (2019) (\$M)	% of WSM value-added	Jobs	% of WSM jobs
Horsham rural City council	75	\$1,372	42	9,556	41
Northern Grampians	59	\$685	22	4,939	22
Yarriambiack	46	\$361	11	2,543	11
Hindmarch	43	\$319	10	2,218	10
Buloke	43	\$341	11	2,416	11
West Wimmera	35	\$125	4	1,175	5

Table 15: WSM Industry diversity, value-added and jobs.

The major contributors to employment are:

Industry Sector	Jobs	%
Agriculture, Forestry & Fishing	4,649	19.90%
Health Care & Social Assistance	4,098	17.50%
Retail Trade	2,278	9.80%
Other	12,335	52.80%

Table 16: WSM industries by jobs

The major contributors to value-added are:

Industry Sector	\$M	%
Agriculture, Forestry & Fishing	\$679.85	20.50%
Rental, Hiring & Real Estate Services	\$440.44	13.30%
Health Care & Social Assistance	\$366.38	11.00%
Other	\$1,836.23	55.30%

Table 17: WSM Industry by value-added

7. Northern Grampians COVID-19 Economic Impact Insights

Official national accounts data, results from the Australian Business Economic Impact Survey (ABEIS), academic publications, and modelling paint a picture of how COVID-19 is changing Australia's economy.

At a local level, there are important observations and questions. Every region's economy is unique. Not only does every region's economy have its own unique composition of employment across industries, there are also unique combinations of occupations within industries, unique industry supply chains, and patterns of household consumption.

Many Local Government areas (LGAs) across Australia have experienced a significant decline in output since Australia recorded its 100th confirmed COVID-19 case in the week ending 14 March 2020. Economies with significant mining and agriculture industries, as is the case for Northern Grampians, are likely to be buffered somewhat by comparisons to economies with a greater reliance on sectors associated with Tourism.

This report shows the estimated impact on key economic indicators in Northern Grampians for February (pre-COVID-19), May and June 2020, as well as JobKeeper estimates. Council will continue to monitor the impacts.

Forecasting the economic impacts of COVID-19 is difficult because we don't know exactly what is going to happen, and key factors are changing so frequently. Future economic impact depends on many global and local factors.

What we can do is monitor and understand the economic impact of the pandemic as it unfolds. This is important to build an evidence base for the economic recovery strategy, as well as:

- determining and prioritise resources to support the survival of business as we transition out of restriction
- Trying and predict the potential longer term impacts to the businesses and our workforce
- Positioning Council to make strong decisions that will spur long-term recovery
- providing a compelling argument for external funding

Economic impact estimates have been drawn from COVID-19 impact models prepared by REMPLAN. The REMPLAN COVID-19 Impact Model has been developed using a combination of ABS 2016 Census, ABS Weekly Payroll Jobs & Wages, O*NET U.S Department of Labour and Grattan Institute and local data collected from the REMPLAN Australian Business Economic Impact Survey (ABEIS). As at 10 June 98 responses had been received from businesses in Northern Grampians (figure 1) and 2,476 responses nationally).

Participation in the business impact survey in Northern Grampians increased from 85 to 98 businesses from 10 June - 11 August 2020. Council will need to continue to engage with businesses to increase participation and enhance economic impact insights over time.

Overall the figures so far show continued job losses and wages and salaries in June compared to May 2020. However losses in total value-added and output were not as significant in June compared to May.

- In Northern Grampians, for June 2020, value-added (\$) to the economy is estimated at \$48M, a fall of -15% of pre-COVID-19 value-added. In May the estimated fall in value-added to the economy represented -16.7% of pre COVID-19 figures.
- For June 2020, total employment is estimated at 4,589, a fall of -7.1% of pre-COVID-19 jobs. Employment in May was estimated to have decreased by -13.4% of pre-COVID-19 job numbers
- For June 2020, the total of wages and salaries is estimated at \$25M, a fall of -8.6%. In May a total loss of -\$3.3M in pre-COVID-19 wages and salaries was estimated.
- For June 2020, industry output is estimated at \$117M, a fall of -11.1%. In May the estimated fall represented -23.1% of pre COVID-19 output in Northern Grampians.
- It is estimated that 26.2% of local businesses have applied for JobKeeper, 63 local government areas in Victoria have more applications and 16 had less than Northern Grampians.

Appendix 12 provides a full breakdown.





8. Northern Grampians Social Context

8.1. Population

Our population has declined

With a 2019 resident population of 11,402 persons, Northern Grampians ranks 12th in Victorian LGAs. The size of the population is showing a slow decline, recording a slight annual decrease from year to year (the current rate of decline is 0.2%). Projected annual population change to 2036 is for a continued slight decline¹, at the rate of 0.6% to reach 10,209 persons. The Shire is currently recording annual 'natural increase' of about 80 persons (approximately 210 births less 130 deaths per year) and net migration of -160. A continuation of this trend is driving the State Government's population projection to 2036.

Northern Grampians is one of just 11 regional Victorian municipalities projected to experience decreasing population over the next 20 years. This is in contrast to the growth outlook expected for regional Victoria overall.

Our population has aged

The age profile of the Shire is older than regional Victorian and Victorian averages, and this ageing structure will become more pronounced over the next twenty years. Persons aged 65+ years are projected to increase from 23.8% of the population to 33.3% of the population. This would be about 640 additional people in the 65+ years age cohort or 23% more than current levels. The age population is in line with Australia's population generally, that is ageing.

Table x shows that in 1991 the largest cohorts were 10-14 years, 0-4 years, 5-9 years and 25-29 years. In 2006 the largest cohorts were 50-54 years, 55-59 years and 45-49 years. By 2016 the largest group was 60-64 years of age. Since 2011, the population has declined by about 4 per, which has implications for the size of the workforce, and for evolving patterns of demand.

Although there is a depopulation trend in Northern Grampians, unlike many other rural communities across Australia with economics largely driven by agriculture, the Shire has been able to hold onto a relatively high proportion of the most productive age cohorts. While farming communities often have ageing communities, farmers and their families are often economically productive long past 65+ years (the formal cut off for economic productivity in the Australian census).

Unlike many other rural communities across Australia, the Shire has relatively good retention of secondary and even tertiary aged residents which is a welcome trend.

Why is this? Have you good schools? Access to secondary and tertiary education?

The younger worker cohort and those in their most productive age group (Parents and Homebuilders) appear to be attracted to Northern Grampians and many appear to stay.

Why they come and even more importantly, why they want to stay?

That said, Parents and Homebuilders are also the cohort most likely to leave.

Is there a lack of appropriate services? Why are they leaving?

Parents and Homebuilders are high value residents. They are likely to be spending most of their expendable income on their children and living expenses.

¹ Victoria in Future 2019.

8.2. Migration

Looking at the level and type of migration in Northern Grampians Shire can indicate whether the population is sedentary and likely to be in the area for a long time (and perhaps have significant ties to the community), or transient, and likely to move on. The age structure of people who move into and out of Northern Grampians Shire is strongly influenced by the residential role and function of the area and can influence demand for particular service.

In Northern Grampians Shire, a higher rate of people did not change address (63.4%), while a lower rate (27.0%) moved from elsewhere in Australia, and a lower rate (1.5%) moved from overseas.

Between 2011 and 2016, the city of Casey was where Northern Grampians received the highest net migration (+40), whilst the highest net loss (-226) was to Ballarat.

In 2016, the age group with the highest net migration to Northern Grampians Shire was persons aged 55 to 64 years.

Between 2011 and 2016, the net migration for people aged:

- 5 to 11 years to Northern Grampians Shire (+11) was from Casey (C), whilst the highest net loss (-8) was to Ballarat
- 12 to 17 years -30 to Ballarat.
- 18 to 24 years to Northern Grampians Shire (-5) was from Horsham (RC), whilst the highest net loss (-86) was to Ballarat, -35 Bendigo and -51 Geelong
- 25 to 34 years to Northern Grampians Shire (+10) was from Yarra (C), whilst the highest net loss (-38) was to Ballarat and Greater Bendigo -25.
- 35 to 44 years to Northern Grampians Shire (+5) was from Ararat (RC), whilst the highest net loss (-15) was to Ballarat and -8 to Greater Bendigo and Warrnambool.
- 45 to 54 years to Northern Grampians Shire (-1) was from Horsham (RC), whilst the highest net loss (-15) was to Ballarat
- 55 to 64 years to Northern Grampians Shire (+10) was from Wyndham (C), whilst the highest net loss (-5) was to Greater Geelong
- 65 years and over to Northern Grampians Shire (+18) was from Ararat (RC), whilst the highest net loss (-17) was to Ballarat.

8.3. Education

The number of children and young people in education has also fallen since 2011, with implications for the future regional workforce.

In 2016, the proportion of the population with tertiary educational attainment is significantly lower than for the rest of the state, although there is a positive trend towards higher educational attainment as shown in table 28, ten year comparison of the level of education categories for the employed people whose place of work is located within Northern Grampians.

The proportion of the population with a trade qualification is roughly in line with regional Victoria and higher than for the state as a whole. Just under half the population 15 years or older has no post-school qualification, which is noticeably higher than for regional Victoria as a whole.

Table 27 shows all the levels of education categories for the employed people whose place of work is located within Northern Grampians, compared to the Grampians Region and Victoria.

	Work in Victoria (State) (2019 Release 1)		Work in Grampians Region (2019 Release 1)		Work in Northern Grampians (S) (2019 Release 1)	
Level of Education	Jobs	%	Jobs	%	Jobs	%
Not applicable	848,332	31.07%	34,034	36.75%	2,207	44.68%
Certificate	570,730	20.90%	25,288	27.30%	1,450	29.35%
Bachelor Degree	621,401	22.76%	14,400	15.55%	535	10.83%
Advanced Diploma and Diploma	317,020	11.61%	10,340	11.16%	482	9.76%
Level of education not stated	46,479	1.70%	1,863	2.01%	108	2.19%
Graduate Diploma and Graduate Certificate	96,538	3.54%	3,051	3.29%	82	1.66%
Postgraduate Degree	209,657	7.68%	3,275	3.54%	67	1.36%
Level of education inadequately described	20,175	0.74%	361	0.39%	9	0.18%
Total	2,730,332	100.00%	92,613	100.00%	4,940	100.00%

Table 18: Level of education categories for the employed people whose place of work is located within Northern Grampians, compared to Grampians Region and Victoria.

8.4. Employment

Employment by Industry: Northern Grampians 2016

	2016 Census			
	Males	Females	Persons	%
Agriculture, Forestry and Fishing	481	149	635	13.1%
Mining	132	14	145	3.0%
Manufacturing	392	149	539	11.1%
Electricity, Gas, Water and Waste Services	40	3	41	0.8%
Construction	241	27	269	5.5%
Wholesale Trade	63	25	87	1.8%
Retail Trade	181	258	436	9.0%
Accommodation and Food Services	142	231	371	7.6%
Transport, Postal and Warehousing	122	30	153	3.1%
Information Media and Telecommunications	4	13	12	0.2%
Financial and Insurance Services	12	30	41	0.8%
Rental, Hiring and Real Estate Services	18	18	29	0.6%
Professional, Scientific and Technical Services	47	72	118	2.4%
Administrative and Support Services	60	53	114	2.3%
Public Administration and Safety	210	171	380	7.8%
Education and Training	66	240	306	6.3%
Health Care and Social Assistance	144	636	778	16.0%
Arts and Recreation Services	38	52	92	1.9%
Other Services	73	54	133	2.7%
Inadequately described/Not stated	106	73	177	3.6%
Total	2,561	2,292	4,859	100%

Table 19: Employment by industry Northern Grampians 2016

Employment by Industry: Australia 2016

	2016 Census			
	Males	Females	Persons	
Agriculture, Forestry and Fishing	185,212	81,739	266,946	2.5%
Mining	149,060	28,581	177,647	1.7%
Manufacturing	493,124	190,564	683,688	6.4%
Electricity, Gas, Water and Waste Services	88,111	27,642	115,753	1.1%
Construction	793,044	118,009	911,056	8.5%
Wholesale Trade	202,328	105,414	307,741	2.9%
Retail Trade	453,244	600,569	1,053,816	9.9%
Accommodation and Food Services	335,872	402,363	738,231	6.9%
Transport, Postal and Warehousing	382,265	117,228	499,491	4.7%
Information Media and Telecommunications	108,320	71,203	179,521	1.7%
Financial and Insurance Services	186,493	198,114	384,608	3.6%
Rental, Hiring and Real Estate Services	88,667	93,482	182,151	1.7%
Professional, Scientific and Technical Services	426,413	349,560	775,978	7.3%
Administrative and Support Services	173,313	192,420	365,731	3.4%
Public Administration and Safety	380,773	332,366	713,135	6.7%
Education and Training	266,099	659,792	925,895	8.7%
Health Care and Social Assistance	289,962	1,061,051	1,351,015	12.6%
Arts and Recreation Services	92,663	84,002	176,667	1.7%
Other Services	215,410	184,225	399,635	3.7%
Inadequately described/Not stated	297,400	177,746	475,143	4.4%
Total	5,607,777	5,076,066	10,683,842	100.0%

Table 20: Employment by industry Australia 2016

Employment by Broad Industry Sector: Northern Grampians and Australia 2016

Jobs	Northern Grampians		Australia	
Primary	780	16.67%	444,593	4.36%
Secondary	849	18.14%	1,710,497	16.76%
Tertiary	676	14.45%	1,861,048	18.23%
Quaternary	1,000	21.37%	3,527,019	34.55%
Quinary	1,374	29.37%	2,665,548	26.11%
Total	4,679	100.00%	10,208,705	100.00%

Table 21: Employment by broad industry sector Northern Grampians and Australia 2016

Employment in Tourism Characteristic and Tourism Connected Sectors: Northern Grampians 2016

	Jobs		Output	Value Added
Tourism Characteristic	616	12.7%	7.80%	7.24%
Tourism Connected	742	15.3%	5.90%	9.05%
Total	1,358	27.9%	13.7%	16.3%

Table 22: Employment in tourism characteristic and tourism connected sectors Northern Grampians 2016

8.5. Unemployment

As of 2019, Northern Grampians had an unemployment rate of 4.6%. Of this figure, 1.95% were looking for full-time work, and 0.75% were looking for part-time work. Like many rural, regional and remote communities, the unemployment rate is relatively low. People who are unemployed are unlikely to stay in rural, regional and remote communities because many of the social services have been centralised/rationalised to larger regional centres, and hence they tend to drift out of smaller communities.

Years	%
2013	3.80%
2014	4.90%
2015	6.00%
2016	5.50%
2017	5.40%
2018	4.10%
2019	4.60%

Table 23: The unemployment rate in Northern Grampians from 2013-2019

8.6. Labour Force Status

The total number of people usually resident in Northern Grampians zones in all applicable Labour Force Status cohorts on Census Night 2016 was 9,725.

Labour Force Status	Victoria (2016)		Grampians Region (2016) zones		Northern Grampians (S) (2016)	
	Persons	%	Persons	%	Persons	%
Employed, worked full-time	1,670,557	34.47%	69,251	35.97%	3,916	40.27%
Not in the labour force	1,610,132	33.23%	60,035	31.18%	2,794	28.73%
Employed, worked part-time	920,876	19.00%	37,489	19.47%	1,717	17.66%
Employed, away from work	144,694	2.99%	6,485	3.37%	346	3.56%
Unemployed, looking for full-time work	103,129	2.13%	3,896	2.02%	190	1.95%
Unemployed, looking for part-time work	90,340	1.86%	2,775	1.44%	73	0.75%
Not stated	305,978	6.31%	12,616	6.55%	689	7.08%
Total	4,845,706	100.00%	192,547	100.00%	9,725	100.00%

Table 24: Status of Employment – (Based on Australian Bureau of Statistics, Census Dictionary, 2016)

8.7. Income Categories

This report shows all the weekly income categories for the employed people whose place of work is located within Victoria, Grampians Region and Northern Grampians.

Weekly Income	Work in Victoria (State) (2019 Release 1)		Work in Grampians Region (2019 Release 1)		Work in Northern Grampians (S) (2019 Release 1)	
	Jobs	%	Jobs	%	Jobs	%
Negative/Nil income	19,020	0.70%	884	0.95%	44	0.89%
\$1-\$149	102,056	3.74%	4,087	4.41%	245	4.96%
\$150-\$299	115,634	4.24%	4,476	4.83%	168	3.40%
\$300-\$399	122,909	4.50%	4,863	5.25%	282	5.71%
\$400-\$499	145,728	5.34%	6,339	6.84%	321	6.50%
\$500-\$649	223,815	8.20%	9,852	10.64%	585	11.84%
\$650-\$799	283,154	10.37%	11,838	12.78%	766	15.51%
\$800-\$999	347,393	12.72%	13,281	14.34%	848	17.17%
\$1,000-\$1,249	367,465	13.46%	12,329	13.31%	668	13.52%
\$1,250-\$1,499	261,324	9.57%	7,787	8.41%	413	8.36%
\$1,500-\$1,749	215,728	7.90%	6,128	6.62%	224	4.53%
\$1,750-\$1,999	146,650	5.37%	3,715	4.01%	148	3.00%
\$2,000-\$2,999	210,933	7.73%	4,001	4.32%	145	2.94%
\$3,000 or more	129,976	4.76%	1,819	1.96%	39	0.79%
Not stated/Not applicable	38,546	1.41%	1,213	1.31%	44	0.89%
Total	2,730,332	100.00%	92,613	100.00%	4,940	100.00%

Table 25: Northern Grampians weekly income categories (2019)

8.8. Employment Type

In 2016 it was estimated that the total Northern Grampians Shire labour force comprised 5119 individuals, of which 4856 or 94.9 % were employed. Of the labour force, 54.6 % was engaged in full time work, while 38.1 % were engaged in part time work. Since the 2011 census the proportion of those engaged in full time work has fallen slightly, while the proportion in part time work has increased.

Employment Type	Victoria (2016)		Grampians Region (2016) zones		Northern Grampians (S) (2016)	
	Persons	%	Persons	%	Persons	%
Contributing family worker	42,005	1.54%	3,191	3.07%	235	4.84%
Employee	2,263,956	82.74%	83,041	79.85%	3,679	75.82%
Not stated	28,552	1.04%	1,347	1.30%	84	1.73%
Owner manager of incorporated enterprise - employees not stated	2,208	0.08%	110	0.11%	7	0.14%
Owner manager of incorporated enterprise with employees	123,760	4.52%	4,769	4.59%	229	4.72%
Owner manager of incorporated enterprise without employees	70,551	2.58%	2,371	2.28%	94	1.94%
Owner manager of unincorporated enterprise - employees not stated	2,945	0.11%	189	0.18%	19	0.39%
Owner manager of unincorporated enterprise with employees	43,062	1.57%	2,393	2.30%	165	3.40%
Owner manager of unincorporated enterprise without employees	159,090	5.81%	6,583	6.33%	340	7.01%
Total	2,736,129	100.00%	103,994	100.00%	4,852	100.00%

Table 26: The total number of people usually resident in Northern Grampians (S) zones in all applicable Employment Type cohorts on Census Night 2016.

8.9. Occupation

The most common occupations in Northern Grampians included Managers 19.0%, Labourers 17.4%, Community and Personal Service Workers 14.2%, Professionals 11.9%, and Technicians and Trades Workers 11.8%. The largest growth in occupation numbers has been in aged and disabled care workers, reflecting the ageing population in the region. There has also been growth in occupations associated with meat processing with an additional 63 people reporting their occupation as packers and boners. Occupations associated with correctional facilities have also increased by 27. Over the period there have been significant reductions in employment associated with welfare support (but offset by the increase in aged and disabled care workers), central government administration, occupations associated with management of retail trade, mining, and sheet metal work and metal fabrication. The data shows significant change in reported farming occupations, both positive and negative. This seems to relate to changes in how individuals have reported their occupation (eg switching between mixed farming vs specialised farming to cope with weather and market conditions rather than an underlying structural shift), and so has not been identified as an issue of interest.

Occupations experiencing the highest growth are generally low income earners:

- The occupation with the highest growth, food process workers, typically has an income between \$33800 and \$51999.
- Another fast-growing occupation is caregiving. Around 90 % of carers earn less than \$65k per annum.

Occupation	Work in Victoria (State) (2019 Release 1)		Work in Grampians Region (2019 Release 1)		Work in Northern Grampians (S) (2019 Release 1)	
	Jobs	%	Jobs	%	Jobs	%
Clerical and Administrative Workers	365,622	13.39%	11,029	11.91%	354	7.17%
Community and Personal Service Workers	297,591	10.90%	11,803	12.74%	688	13.93%
Labourers	243,074	8.90%	10,930	11.80%	955	19.33%
Machinery Operators And Drivers	153,143	5.61%	5,205	5.62%	344	6.96%
Managers	370,255	13.56%	14,050	15.17%	954	19.31%
Not stated - Inadequately described	23,758	0.87%	611	0.66%	19	0.38%
Professionals	651,119	23.85%	17,317	18.70%	642	13.00%
Sales Workers	269,344	9.86%	9,106	9.83%	431	8.72%
Technicians and Trades Workers	356,425	13.05%	12,563	13.56%	553	11.19%
Total	2,730,332	100.00%	92,613	100.00%	4,940	100.00%

Table 27: Occupation (Source: Remplan Community, Occupation, Australian Bureau of Statistics (ABS), 2016 census)

8.10. Internet

The percentage of Northern Grampians population with internet access was lower than that of the wider Grampians Region and Victoria population.

Northern Grampians also have a high percentage of people of don't have the internet from their dwelling.

Connection	Victoria (2016)		Grampians Region (2016)		Northern Grampians (2016)	
	Persons	%	Persons	%	Persons	%
Internet accessed from dwelling	4,914,510	85.14%	184,603	81.73%	8,396	75.75%
Internet not accessed from dwelling	483,199	8.37%	26,380	11.68%	1,826	16.47%
Not stated	374,406	6.49%	14,900	6.60%	862	7.78%
Total	5,772,115	100.00%	225,883	100.00%	11,084	100.00%

Table 28: Internet access Sources: REMPLAN Community, ABS Census of Population and Housing 2016





9. Socio Economic Indexes for Areas (SEIFA)

Northern Grampians Shire is among the most disadvantaged in Victoria, at the 17th percentile. A SEIFA low score indicates relatively greater disadvantage in general. For example, an area could have a low score if there are (among other things):

- many households with low income
- many people with no qualifications or
- many people in low skill occupations

A SEIFA high score indicates a relative lack of disadvantage in general. For example, an area may have a high score if there are (among other things):

- Few households with low incomes, few people with no qualifications, and few people in low skilled occupations.

Based on pre-COVID-19 figures Northern Grampians lagged behind the majority of Victoria in terms of overall levels of employment, income, education, internet access, professional occupations and housing type.²

The SEIFA score for Northern Grampians (S) in 2016 was 937.

Across Australia's local government areas SEIFA scores range from 188 (most disadvantaged) to 1186 (least disadvantaged).

Northern Grampians:

- Northern Grampians is the fourth most disadvantaged LGAs in Victoria, alongside Mildura.
- This makes 95% of LGAs in Victoria better off than Northern Grampians based on socio-economic indicators.
- Ranks 135 out of 544 local government areas with SEIFA scores in Australia
- There are 409 local government areas which are less disadvantaged
- There are 134 local government areas that are more disadvantaged

² Australian Bureau of Statistics, Census of Population and Housing 2016. Compiled and presented in profile.id

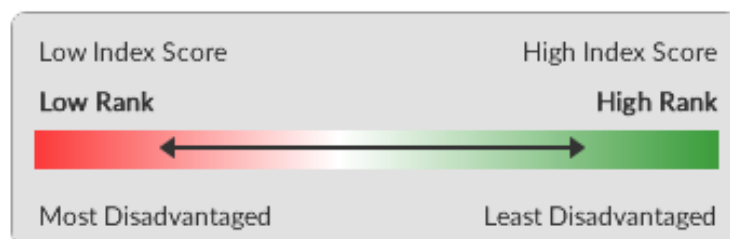
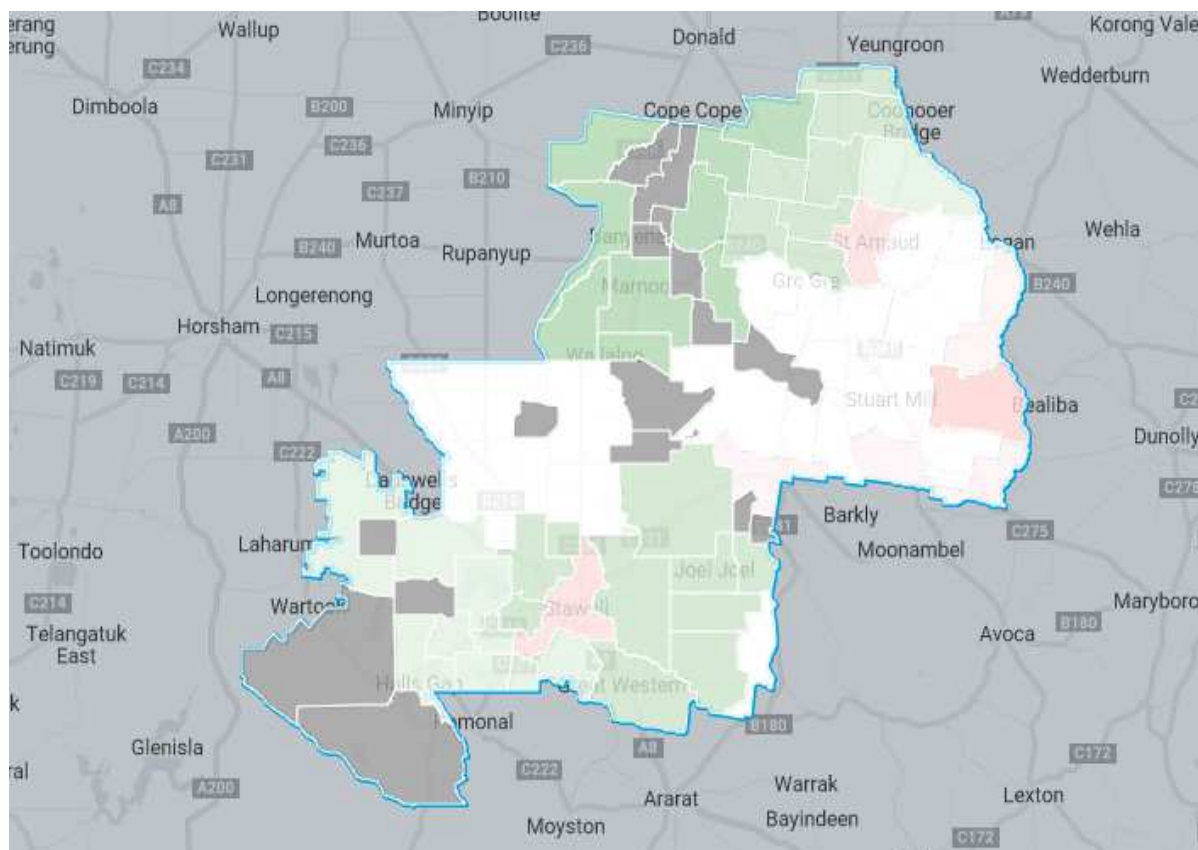


Figure 10: 2 SEIFA index across Northern Grampians. Source: Remplan from the Australian Bureau of Statistics 2016 Census of Population and Housing.



Level of Education	2019, R1		2018 R2		2017 R3		2016 R2		2015 R1		2014 R2		2013 R2		2012 R 2	
	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%
Postgraduate Degree	67	1.36	69	1.40	69	1.40	62	1.19	59	1.23	59	1.23	59	1.23	59	1.24
Graduate Diploma and Graduate Certificate	82	1.66	81	1.65	81	1.65	110	2.10	104	2.18	104	2.18	104	2.18	104	2.19
Bachelor Degree	535	10.83	537	10.87	537	10.87	447	8.54	421	8.86	421	8.86	421	8.86	420	8.84
Advanced Diploma and Diploma	482	9.76	482	9.76	482	9.76	433	8.27	404	8.49	404	8.49	404	8.49	403	8.47
Certificate	1,450	29.35	1,432	29.00	1,432	29.00	1,438	27.45	1,283	26.97	1,283	26.97	1,283	26.97	1,284	26.98
Level of education inadequately described	9	0.18	9	0.18	9	0.18	47	0.90	44	0.93	44	0.93	44	0.93	45	0.95
Level of education not stated	108	2.19	106	2.15	106	2.15	155	2.97	143	3.00	143	3.00	143	3.00	143	3.00
Not applicable	2,207	44.68	2,223	44.99	2,223	44.99	2,545	48.58	2,300	48.35	2,300	48.35	2,300	48.35	2,299	48.33
Total	4,940		4,940		4,940		5,239		4,757		4,757		4,757		4,757	

Table 29: Ten year comparison of the level of education categories for the employed people whose place of work is located within Northern Grampians



10. Key Sectors

The data indicated that the following industries represent a significant portion of employment, value-added, specialisation and growth over time.

The following sectors will be profiled in Part 3 of the background paper and will be the focus of our engagement and targeted as part of the qualitative research process with our business and wider community.

- Agriculture
- Manufacturing
- Resources
- Health Care, residential care and social assistance services
- Tourism

11. Appendix

11.1. Value-added by sector (of 114 sectors) to Northern Grampians Economy

Industry Sector	Northern Grampians (\$) (2019 Release 1)
Sheep, Grains, Beef & Dairy Cattle	\$71.1170
Non Ferrous Metal Ore Mining	\$55.4157
Meat & Meat Product Manufacturing	\$42.2725
Health Care Services	\$41.9059
Residential Care & Social Assistance Services	\$36.2195
Retail Trade	\$34.0994
Public Administration & Regulatory Services	\$32.3108
Education & Training	\$27.6430
Construction Services	\$25.3269
Poultry & Other Livestock	\$24.7315
Finance	\$18.0694
Administrative & Support Services	\$16.4540
Food & Beverage Services	\$15.2484
Wholesale Trade	\$14.7397
Accommodation	\$14.2941
Road Transport	\$9.9249
Professional, Scientific & Technical Services	\$9.6099
Other Food Product Manufacturing	\$7.6284
Basic Chemical Manufacturing	\$7.0063
Heavy & Civil Engineering Construction	\$6.9417
Other Agriculture	\$6.8366
Public Order & Safety	\$6.4621
Water Supply, Sewerage & Drainage Services	\$6.4470
Non-Residential Property Operators & Real Estate Serv.	\$6.1610
Agriculture, Forestry & Fishing Support Services	\$5.5521
Automotive Repair & Maintenance	\$4.5134
Residential Building Construction	\$4.4642
Sports & Recreation	\$2.9196
Heritage, Creative & Performing Arts	\$2.8698
Other Services	\$2.7912
Wine, Spirits & Tobacco	\$2.6905
Aircraft Manufacturing	\$2.6122
Ceramic Product Manufacturing	\$2.5133
Postal & Courier Pick-up & Delivery Service	\$2.3878
Non Metallic Mineral Mining	\$2.1490
Computer Systems Design & Related Services	\$2.0774
Bakery Product Manufacturing	\$1.9966
Auxiliary Finance & Insurance Services	\$1.9199
Waste Collection, Treatment & Disposal Services	\$1.8966
Personal Services	\$1.8004
Rental & Hiring Services (except real estate)	\$1.6979

Other Repair & Maintenance	\$1.5612
Structural Metal Product Manufacturing	\$1.5084
Library & Other Information Services	\$1.1843
Exploration & Mining Support Services	\$1.1543
Textile Product Manufacturing	\$1.1236
Cement, Lime & Ready-Mixed Concrete Manufacturing	\$1.1002
Polymer Product Manufacturing	\$1.0899
Publishing (except Internet & Music Publishing)	\$0.8427
Specialised & Other Machinery & Equipment Manu.	\$0.7709
Iron & Steel Manufacturing	\$0.7039
Other Non-Metallic Mineral Product Manufacturing	\$0.6378
Furniture Manufacturing	\$0.2156

Table 30: Value-added by sector (of 114 sectors) to Northern Grampians Economy

11.2. Total Value-added over 10 years (2010-2019)

Industry Sector	Total Value-added over 10 years (2010-2019)
	Bold= in the top 10 & top 65% of total Value-added)
Non Ferrous Metal Ore Mining	\$941.36
Sheep, Grains, Beef & Dairy Cattle	\$508.71
Health Care Services	\$367.24
Retail Trade	\$329.00
Public Administration & Regulatory Services	\$306.93
Meat & Meat Product Manufacturing	\$268.36
Education & Training	\$248.91
Residential Care & Social Assistance Services	\$237.32
Wholesale Trade	\$187.86
Finance	\$161.76
Poultry & Other Livestock	\$161.18
Construction Services	\$152.42
Accommodation	\$134.31
Food & Beverage Services	\$122.88
Administrative & Support Services	\$122.72
Basic Chemical Manufacturing	\$109.97
Professional, Scientific & Technical Services	\$108.03
Road Transport	\$99.33
Wine, Spirits & Tobacco	\$86.48
Other Food Product Manufacturing	\$67.42
Heavy & Civil Engineering Construction	\$56.17
Non-Residential Property Operators & Real Estate Serv.	\$54.02
Automotive Repair & Maintenance	\$45.87
Public Order & Safety	\$45.28
Polymer Product Manufacturing	\$41.29
Specialised & Other Machinery & Equipment Manu.	\$39.55
Structural Metal Product Manufacturing	\$37.26
Residential Building Construction	\$34.91
Other Agriculture	\$34.90
Water Supply, Sewerage & Drainage Services	\$33.92

Agriculture, Forestry & Fishing Support Services	\$32.75
Ceramic Product Manufacturing	\$29.43
Sports & Recreation	\$29.14
Publishing (except Internet & Music Publishing)	\$25.33
Computer Systems Design & Related Services	\$25.16
Waste Collection, Treatment & Disposal Services	\$25.01
Other Services	\$24.54
Heritage, Creative & Performing Arts	\$24.50
Personal Services	\$18.68
Postal & Courier Pick-up & Delivery Service	\$17.82
Bakery Product Manufacturing	\$15.85
Non Metallic Mineral Mining	\$14.73
Aircraft Manufacturing	\$14.56
Exploration & Mining Support Services	\$13.60
Other Repair & Maintenance	\$11.99
Other Non-Metallic Mineral Product Manufacturing	\$10.22
Non-Residential Building Construction	\$9.91
Iron & Steel Manufacturing	\$9.88
Textile Product Manufacturing	\$9.34
Rental & Hiring Services (except real estate)	\$8.80
Other Wood Product Manufacturing	\$7.35
Library & Other Information Services	\$7.11
Other Fabricated Metal Product Manufacturing	\$6.90
Auxiliary Finance & Insurance Services	\$6.80
Insurance & Superannuation Funds	\$6.01
Metal Containers & Other Sheet Metal Prod. Manu.	\$5.78
Printing (including the reproduction of recorded media)	\$4.41
Air & Space Transport	\$4.16
Basic Non-Ferrous Metal Manufacturing	\$3.82
Furniture Manufacturing	\$3.39
Cement, Lime & Ready-Mixed Concrete Manufacturing	\$3.26
Water, Pipeline & Other Transport	\$2.75
Motor Vehicles & Parts; Other Transport Equip. Manu.	\$2.23
Other Manufactured Products	\$1.89
Transport Support Services & Storage	\$1.75
Telecommunication Services	\$1.53
Grain Mill & Cereal Product Manufacturing	\$1.41
Prof, Scientific, Computer & Electronic Equip. Manu.	\$0.70
Clothing Manufacturing	\$0.40

Table 31: Total Value-added over 10 years (2010-2019)

11.3. Difference in Value-added (\$M) comparing the total 2010 with the total in 2019 (\$M)

Industry Sector	Difference b/t the total in 2019 & the total in 2010
Meat & Meat Product Manufacturing	\$24.05
Sheep, Grains, Beef & Dairy Cattle	\$22.88
Residential Care & Social Assistance Services	\$20.68
Construction Services	\$17.02
Poultry & Other Livestock	\$13.32
Health Care Services	\$10.19
Food & Beverage Services	\$6.79
Administrative & Support Services	\$6.16
Other Agriculture	\$5.67
Heavy & Civil Engineering Construction	\$4.26
Retail Trade	\$4.15
Water Supply, Sewerage & Drainage Services	\$3.94
Finance	\$3.66
Public Administration & Regulatory Services	\$2.83
Education & Training	\$2.68
Public Order & Safety	\$2.64
Aircraft Manufacturing	\$2.61
Non-Residential Property Operators & Real Estate Serv.	\$2.59
Agriculture, Forestry & Fishing Support Services	\$2.41
Accommodation	\$1.68
Non Metallic Mineral Mining	\$1.35
Bakery Product Manufacturing	\$1.11
Cement, Lime & Ready-Mixed Concrete Manufacturing	\$1.10
Residential Building Construction	\$1.06
Library & Other Information Services	\$0.88
Other Food Product Manufacturing	\$0.87
Auxiliary Finance & Insurance Services	\$0.58
Other Repair & Maintenance	\$0.57
Computer Systems Design & Related Services	\$0.44
Personal Services	\$0.24
Insurance & Superannuation Funds	\$0.00
Water, Pipeline & Other Transport	\$0.00
Basic Non-Ferrous Metal Manufacturing	\$0.00
Other Manufactured Products	\$0.00
Automotive Repair & Maintenance	-\$0.16
Clothing Manufacturing	-\$0.17
Postal & Courier Pick-up & Delivery Service	-\$0.18
Other Services	-\$0.20
Rental & Hiring Services (except real estate)	-\$0.29
Furniture Manufacturing	-\$0.33
Waste Collection, Treatment & Disposal Services	-\$0.36
Prof, Scientific, Computer & Electronic Equip. Manu.	-\$0.37
Other Fabricated Metal Product Manufacturing	-\$0.46
Metal Containers & Other Sheet Metal Prod. Manu.	-\$0.49
Road Transport	-\$0.51

Air & Space Transport	-\$0.56
Iron & Steel Manufacturing	-\$0.57
Grain Mill & Cereal Product Manufacturing	-\$0.58
Textile Product Manufacturing	-\$0.70
Telecommunication Services	-\$0.73
Sports & Recreation	-\$0.75
Heritage, Creative & Performing Arts	-\$0.85
Transport Support Services & Storage	-\$0.89
Ceramic Product Manufacturing	-\$0.93
Motor Vehicles & Parts; Other Transport Equip. Manu.	-\$1.09
Other Non-Metallic Mineral Product Manufacturing	-\$1.11
Exploration & Mining Support Services	-\$1.15
Other Wood Product Manufacturing	-\$1.18
Professional, Scientific & Technical Services	-\$1.19
Printing (including the reproduction of recorded media)	-\$1.27
Publishing (except Internet & Music Publishing)	-\$1.66
Non-Residential Building Construction	-\$2.29
Wholesale Trade	-\$2.81
Structural Metal Product Manufacturing	-\$4.00
Specialised & Other Machinery & Equipment Manu.	-\$5.88
Polymer Product Manufacturing	-\$10.39
Basic Chemical Manufacturing	-\$12.52
Wine, Spirits & Tobacco	-\$17.15
Non Ferrous Metal Ore Mining	-\$112.40

Table 32: Difference in Value-added (\$M) comparing the total 2010 with the total in 2019 (\$M)

11.4. Growth trends (\$M) in value-added of 114 sectors over three time periods

Industry Sector	Number of growth years over 10 year period (2010-2019)	Number of growth years over 5 year period (2019-2015)	Number of growth years over 2 year period (2019-2018)
Construction Services	10	5	2
Other Agriculture	10	5	2
Residential Care & Social Assistance Services	9	5	2
Health Care Services	9	4	2
Water Supply, Sewerage & Drainage Services	9	5	2
Non-Residential Property Operators & Real Estate Serv.	9	4	2
Non Metallic Mineral Mining	9	5	2
Library & Other Information Services	9	5	2
Poultry & Other Livestock	8	5	2
Administrative & Support Services	8	5	2
Retail Trade	8	4	2
Finance	8	4	2
Public Order & Safety	8	5	2
Aircraft Manufacturing	8	4	2



Professional, Scientific & Technical Services	8	4	2
Wholesale Trade	8	4	2
Meat & Meat Product Manufacturing	7	5	2
Sheep, Grains, Beef & Dairy Cattle	7	4	2
Food & Beverage Services	7	4	2
Heavy & Civil Engineering Construction	7	3	2
Public Administration & Regulatory Services	7	4	2
Agriculture, Forestry & Fishing Support Services	7	5	2
Accommodation	7	3	2
Bakery Product Manufacturing	7	4	2
Other Food Product Manufacturing	7	4	2
Other Repair & Maintenance	7	4	2
Computer Systems Design & Related Services	7	4	2
Personal Services	7	4	2
Automotive Repair & Maintenance	7	4	2
Postal & Courier Pick-up & Delivery Service	7	5	2
Waste Collection, Treatment & Disposal Services	7	4	2
Heritage, Creative & Performing Arts	7	5	2
Publishing (except Internet & Music Publishing)	7	3	2
Polymer Product Manufacturing	7	4	2
Non Ferrous Metal Ore Mining	7	4	2
Education & Training	6	4	2
Residential Building Construction	6	4	2
Other Services	6	4	2
Metal Containers & Other Sheet Metal Prod. Manu.	6	1	0
Road Transport	6	3	2
Iron & Steel Manufacturing	6	3	2
Textile Product Manufacturing	6	5	2
Sports & Recreation	6	4	2
Other Non-Metallic Mineral Product Manufacturing	6	4	2
Specialised & Other Machinery & Equipment Manu.	6	3	2
Basic Chemical Manufacturing	6	3	2
Rental & Hiring Services (except real estate)	5	4	2
Other Fabricated Metal Product Manufacturing	5	0	0
Ceramic Product Manufacturing	5	3	2
Exploration & Mining Support Services	5	3	2
Wine, Spirits & Tobacco	5	3	2
Auxiliary Finance & Insurance Services	4	4	2
Insurance & Superannuation Funds	4	1	0
Water, Pipeline & Other Transport	4	0	0
Furniture Manufacturing	4	2	2
Air & Space Transport	4	0	0
Other Wood Product Manufacturing	4	1	0
Non-Residential Building Construction	4	1	0
Structural Metal Product Manufacturing	4	3	2
Cement, Lime & Ready-Mixed Concrete Manufacturing	3	3	2
Basic Non-Ferrous Metal Manufacturing	3	1	0
Other Manufactured Products	3	0	0
Clothing Manufacturing	1	0	0
Grain Mill & Cereal Product Manufacturing	1	0	0



Telecommunication Services	1	0	0
Motor Vehicles & Parts; Other Transport Equip. Manu.	1	0	0
Printing (including the reproduction of recorded media)	1	0	0
Prof, Scientific, Computer & Electronic Equip. Manu.	0	0	0
Transport Support Services & Storage	0	0	0

Table 33: Growth trends (\$M) in value-added of 114 sectors over three time periods – the ten years since 2010/19, the five years since 2015/19, and the two years since 2018/19



Industry Sector	% of total for 2019	2019 (R1)	(2010-2019) 10 year period (no. of growth years)	(2019-2015) Total \$ 5 year period (no. of growth years)	(2019-2018) Total \$ 2 year period (no. of growth years)	Total Value-added over 10 years (2010-2019)	Percentage of total VD over 10 years	difference 2010-2019	% Difference b/t the total in 2019 & 2010
Construction	5.38%	\$36.733	10	5	2	\$253.42	4.00%	\$20.05	120.18%
Electricity, Gas, Water & Waste Services	1.22%	\$8.344	9	5	2	\$58.93	0.93%	\$3.58	75.05%
Accommodation & Food Services	1.01%	\$6.860	7	3	2	\$50.01	0.79%	\$2.84	70.78%
Agriculture, Forestry & Fishing	15.84%	\$108.092	8	5	2	\$736.68	11.63%	\$44.18	69.13%
Health Care & Social Assistance	11.40%	\$77.779	9	5	2	\$600.32	9.48%	\$31.03	66.36%
Administrative & Support Services	2.21%	\$15.081	7	4	2	\$112.65	1.78%	\$5.02	49.93%
Ownership of Dwellings	11.49%	\$78.447	8	4	2	\$677.63	10.70%	\$23.77	43.47%
Rental, Hiring & Real Estate Services	1.13%	\$7.711	8	4	2	\$61.12	0.96%	\$2.30	42.43%
Tourism	5.97%	\$40.739	8	4	2	\$367.20	5.80%	\$10.15	33.19%
Financial & Insurance Services	2.93%	\$19.989	8	4	2	\$175.72	2.77%	\$4.26	27.09%
Public Administration & Safety	5.68%	\$38.773	7	4	2	\$352.21	5.56%	\$5.46	16.40%
Retail Trade	4.49%	\$30.649	8	4	2	\$298.68	4.71%	\$3.19	11.62%
Education & Training	3.97%	\$27.117	7	4	2	\$245.55	3.88%	\$2.47	10.04%
Other Services	1.53%	\$10.466	7	4	2	\$99.62	1.57%	\$0.38	3.78%
Arts & Recreation Services	0.88%	\$5.985	5	4	2	\$52.51	0.83%	-\$0.32	-5.12%
Professional, Scientific & Technical Services	1.71%	\$11.687	9	4	2	\$133.19	2.10%	-\$0.74	-5.97%
Transport, Postal & Warehousing	1.55%	\$10.594	8	4	2	\$103.82	1.64%	-\$1.92	-15.37%
Wholesale Trade	2.11%	\$14.386	8	4	2	\$184.48	2.91%	-\$2.92	-16.86%
Manufacturing	10.60%	\$72.360	7	4	2	\$766.90	12.10%	-\$29.42	-28.90%
Information Media & Telecommunications	0.29%	\$1.965	8	4	2	\$33.28	0.53%	-\$1.49	-43.11%
Mining	8.60%	\$58.719	7	4	2	\$971.61	15.34%	-\$112.20	-65.65%

Table 34: Growth trends (\$M) in value-added of 19 sectors over three time periods – the ten years since 2010/19, the five years since 2015/19, and the two years since 2018/19.

11.5. Key propulsive industries in NGS

Industry Sectors	Backward Linkages	Exports	Employment	Value Added	Total	Key
Sheep, Grains, Beef & Dairy Cattle	Yes	Yes	Yes	Yes	4	Yes
Poultry & Other Livestock	Yes	Yes	Yes	Yes	4	Yes
Agriculture, Forestry & Fishing Support Services	Yes	Yes	Yes	Yes	4	Yes
Non Ferrous Metal Ore Mining	Yes	Yes	Yes	Yes	4	Yes
Meat & Meat Product Manufacturing	Yes	Yes	Yes	Yes	4	Yes
Other Food Product Manufacturing	Yes	Yes	Yes	Yes	4	Yes
Food & Beverage Services	Yes	Yes	Yes	Yes	4	Yes
Road Transport	Yes	Yes	Yes	Yes	4	Yes
Building Cleaning, Pest Control and Other Support Services	Yes	Yes	Yes	Yes	4	Yes
Other Agriculture	Yes		Yes	Yes	3	
Wine, Spirits & Tobacco	Yes	Yes	Yes		3	
Residential Building Construction	Yes		Yes	Yes	3	
Construction Services	Yes		Yes	Yes	3	
Wholesale Trade		Yes	Yes	Yes	3	
Retail Trade		Yes	Yes	Yes	3	
Accommodation		Yes	Yes	Yes	3	
Postal, Courier Pick-up & Delivery Service	Yes	Yes	Yes		3	
Finance		Yes	Yes	Yes	3	
Professional, Scientific & Technical Services	Yes		Yes	Yes	3	
Employment, Travel Agency and Other Administrative Services		Yes	Yes	Yes	3	
Public Administration & Regulatory Services		Yes	Yes	Yes	3	
Pre-School, Primary, Secondary & Special Education		Yes	Yes	Yes	3	
Health Care Services		Yes	Yes	Yes	3	
Residential Care & Social Assistance Services		Yes	Yes	Yes	3	
Heritage, Creative & Performing Arts	Yes	Yes	Yes		3	
Sports & Recreation	Yes		Yes	Yes	3	
Bakery Product Manufacturing	Yes		Yes		2	
Basic Chemical Manufacturing		Yes		Yes	2	
Polymer Product Manufacturing	Yes	Yes			2	
Cement, Lime & Ready-Mixed Concrete Manufacturing	Yes	Yes			2	
Waste Collection, Treatment & Disposal Services	Yes	Yes			2	
Heavy & Civil Engineering Construction	Yes			Yes	2	



Ownership of Dwellings		Yes		Yes	2	
Non-Residential Property Operators & Real Estate Serv.	Yes			Yes	2	
Public Order & Safety			Yes	Yes	2	
Automotive Repair & Maintenance			Yes	Yes	2	
Personal Services	Yes		Yes		2	
Non Metallic Mineral Mining		Yes			1	
Textile Product Manufacturing		Yes			1	
Ceramic Product Manufacturing		Yes			1	
Other Non-Metallic Mineral Product Manufacturing	Yes				1	
Structural Metal Product Manufacturing	Yes				1	
Aircraft Manufacturing		Yes			1	
Water Supply, Sewerage & Drainage Services				Yes	1	
Rental & Hiring Services (except real estate)	Yes				1	
Computer Systems Design & Related Services	Yes				1	
Gambling	Yes				1	
Other Repair & Maintenance	Yes				1	

Table 35: Key propulsive industries in NGS



11.6. Population by age in Northern Grampians

Age	2016		2011		2006		2001		1996		1991	
	Persons	%	Persons	%	Persons	%	Persons	%	Persons	%	Persons	%
0-4 years	523	4.55%	578	4.89%	662	5.58%	853	6.72%	911	7.01%	981	7.57%
5-9 years	559	4.86%	687	5.81%	804	6.77%	917	7.22%	1,006	7.74%	962	7.42%
10-14 years	627	5.46%	844	7.14%	835	7.04%	1,090	8.58%	994	7.65%	1,080	8.34%
15-19 years	659	5.73%	740	6.26%	808	6.81%	737	5.80%	798	6.14%	885	6.83%
20-24 years	539	4.69%	590	4.99%	469	3.95%	535	4.21%	618	4.75%	841	6.49%
25-29 years	637	5.54%	523	4.43%	507	4.27%	649	5.11%	865	6.65%	929	7.17%
30-34 years	493	4.29%	539	4.56%	653	5.50%	846	6.66%	961	7.39%	885	6.83%
35-39 years	545	4.74%	676	5.72%	753	6.34%	910	7.16%	948	7.29%	927	7.15%
40-44 years	668	5.81%	777	6.58%	866	7.30%	898	7.07%	943	7.25%	909	7.02%
45-49 years	758	6.60%	856	7.24%	874	7.36%	903	7.11%	925	7.11%	781	6.03%
50-54 years	882	7.67%	892	7.55%	907	7.64%	863	6.79%	754	5.80%	664	5.12%
55-59 years	886	7.71%	916	7.75%	887	7.47%	761	5.99%	647	4.98%	597	4.61%
60-64 years	953	8.29%	887	7.51%	727	6.13%	639	5.03%	565	4.35%	632	4.88%
65-69 years	921	8.01%	696	5.89%	577	4.86%	498	3.92%	594	4.57%	571	4.41%
70-74 years	650	5.66%	511	4.32%	466	3.93%	512	4.03%	527	4.05%	426	3.29%
75-79 years	475	4.13%	409	3.46%	447	3.77%	437	3.44%	367	2.82%	391	3.02%
80-84 years	333	2.90%	357	3.02%	341	2.87%	283	2.23%	295	2.27%	290	2.24%
85-89 years	243	2.11%	226	1.91%	179	1.51%	197	1.55%	169	1.30%	131	1.01%
90-94 years	105	0.91%	87	0.74%	92	0.78%	73	0.57%	0	0.00%	0	0.00%
95-99 years	33	0.29%	22	0.19%	15	0.13%	13	0.10%	0	0.00%	0	0.00%
100 years and over	3	0.03%	4	0.03%	0	0.00%	3	0.02%	0	0.00%	0	0.00%
Total	11,492		11,817		11,869		12,701		13,001		12,957	

Table 36: Population by age in Northern Grampians

11.7. Migration between Northern Grampians and other States/Territories

State / Territory	In migration	Out migration	Net migration
New South Wales	52	121	-69
Victoria	1,203	1,439	-236
Queensland	73	127	-54
South Australia	61	53	8
Western Australia	42	42	0
Tasmania	12	17	-5
Northern Territory	11	21	-10
From Overseas	160		

Table 37: Migration between Northern Grampians and other States/Territories.

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual Residence Data). Compiled and presented in profile.id by .id

11.8. Net gains and losses by LGA, Northern Grampians Shire - between 2011 and 2016

LGA	In migration	Out migration	Net migration
Ballarat (C)	56	282	-226
Greater Bendigo (C)	32	130	-98
Greater Geelong (C)	61	99	-38
Swan Hill (RC)	7	30	-23
Townsville (C)	0	15	-15
Monash (C)	10	24	-14
Golden Plains (S)	4	18	-14
Central Goldfields (S)	15	28	-13
Murray River (A)	5	18	-13
Ararat (RC)	124	135	-11
Warrnambool (C)	20	30	-10
Wodonga (C)	3	13	-10
Wanneroo (C)	0	10	-10
Moyne (S)	12	20	-8
Boroondara (C)	11	19	-8
Loddon (S)	7	15	-8
Cairns (R)	3	11	-8
East Gippsland (S)	9	16	-7
Campaspe (S)	4	11	-7
Buloke (S)	24	30	-6
Darebin (C)	6	12	-6
Rockhampton (R)	4	10	-6
Melbourne (C)	9	14	-5
Glenelg (S)	18	22	-4
Surf Coast (S)	10	13	-3
Moorabool (S)	11	13	-2
Horsham (RC)	75	76	-1
Whittlesea (C)	9	10	-1
Cardinia (S)	19	18	1
Hume (C)	14	13	1

Hindmarsh (S)	11	10	1
Brimbank (C)	11	10	1
Greater Shepparton (C)	22	18	4
Yarriambiack (S)	23	18	5
Whitehorse (C)	19	14	5
Maroondah (C)	11	6	5
Toowoomba (R)	10	5	5
Pyrenees (S)	22	16	6
Southern Grampians (S)	18	12	6
Moonee Valley (C)	12	6	6
Brisbane (C)	10	4	6
Maribyrnong (C)	14	7	7
Yarra Ranges (S)	11	4	7
LGA	In migration	Out migration	Net migration
Hobsons Bay (C)	17	9	8
Corangamite (S)	11	3	8
Mildura (RC)	23	14	9
Moreland (C)	21	12	9
Frankston (C)	20	11	9
Colac-Otway (S)	13	4	9
Banyule (C)	18	7	11
Latrobe (C) (Vic.)	15	4	11
Melton (C)	23	10	13
Manningham (C)	15	0	15
Knox (C)	25	9	16
Wyndham (C)	48	29	19
Mornington Peninsula (S)	39	9	30
Casey (C)	49	9	40

Appendix 9: Net gains and losses by LGA, Northern Grampians Shire - between 2011 and 2016.

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual Residence Data). Compiled and presented in profile.id by .id

12. Appendix - COVID-19 Economic Impact Insights

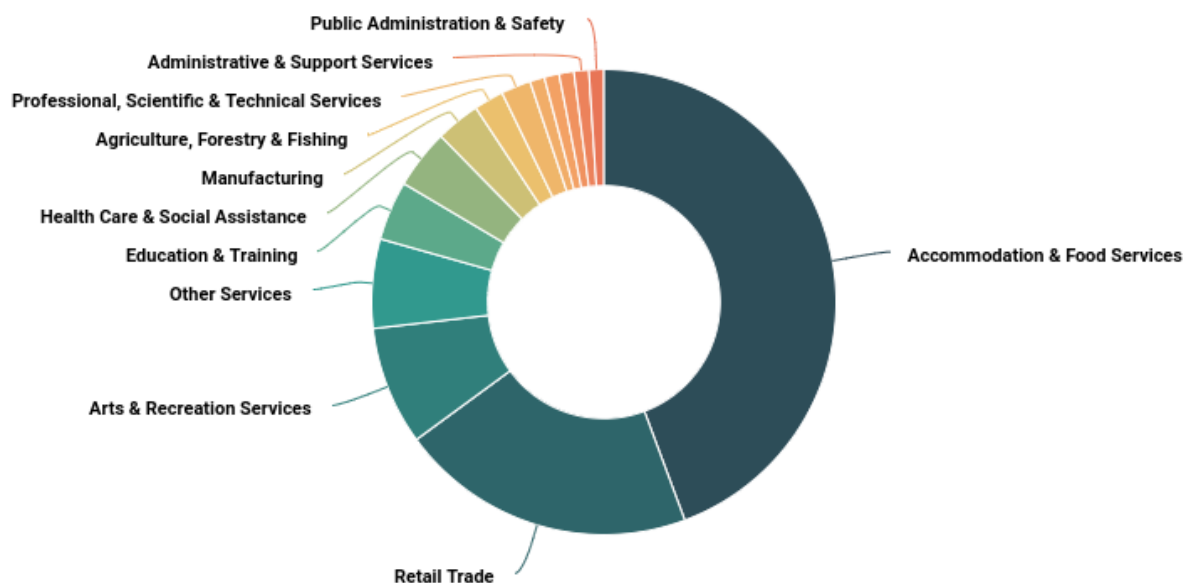


Figure 11: COVID-19 Australian Business Economic Impact Survey Northern Grampians response rate (as of 11 August 2020).

12.1. COVID-19 Impact on Value-Added

In Northern Grampians, prior to COVID-19 and the introduction of social lockdown measures to manage the pandemic, the total monthly value added across all local industry sectors was estimated at \$57M. For June 2020, value added is estimated at \$48M, a fall of 15%.

The greatest decrease in value-added is in Rental, Hiring & Real Estate Services. In percentage terms, it's Accommodation and Food Services.

12.2. COVID-19 Impact on Employment

In Northern Grampians, prior to COVID-19 and the introduction of social lockdown measures to manage the pandemic, the total employment across all local industry sectors was estimated at 4,940.

For June 2020, total employment is estimated at 4,589, a fall of 7%.

The greatest decrease in employment is in Manufacturing. In percentage terms, it's Arts and Recreation Services.

12.3. COVID-19 Impact on Wages and Salaries

Prior to COVID-19 and the introduction of social lockdown measures, the total monthly expenditure for wages and salaries across all local industry sectors in Northern Grampians was estimated at \$27M. For June 2020, the total of wages & salaries is estimated at \$25M, a fall of 8.6%.

The greatest decrease in wages and salaries is in Manufacturing. In percentage terms, it's Mining.

12.4. COVID-19 Impact on Output

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income. It does not equal profit.



In Northern Grampians, prior to COVID-19 and the introduction of social lockdown measures to manage the pandemic, the total monthly output across all local industry sectors was estimated at \$132M. For June 2020, industry output is estimated at \$117M, a fall of 11.1%.

The greatest decrease in output is in Manufacturing. In percentage terms, it's Rental, Hiring and Real Estate Services.

12.5. Job Keeper

The Australian Government's JobKeeper initiative has been one of its key responses to the COVID-19 pandemic to support businesses and retain jobs. The initial scheme was due to come to an end in September, but payments have been extended until March 2021.

REMPPLAN has used the postcode-based data released by the Australian Government to estimate the proportion of businesses in each Local Government Area (LGA) that have made applications to receive payments under JobKeeper as at 30 May 2020. This analysis has then been incorporated into an interactive and themed map located [here](#) where you can search for an LGA of interest or browse the map to find a particular region. Figure six indicates the percentage of businesses in Victorian LGAs who applied for JobKeeper.

Northern Grampians

Businesses eligible for JobKeeper have experienced a decline in revenue of at least 30%.

Higher levels of JobKeeper applications are a likely indicator of greater negative economic impacts from COVID-19.

In Northern Grampians (S) it is estimated that 26.2% of local businesses have applied for JobKeeper support (figure along with three other LGs in Victoria including Ararat and Strathbodrie Shires.

Northern Grampians (S) JobKeeper applications as a percentage of total local businesses:

- Ranked 64 out of 80 local government areas in Victoria.
- 63 local government areas in Victoria have more applications
- 16 local government areas in Victoria have less applications.



Mar 2020 (pre COVID-19) (\$M), Apr 2020, May 2020 and Jun 2020

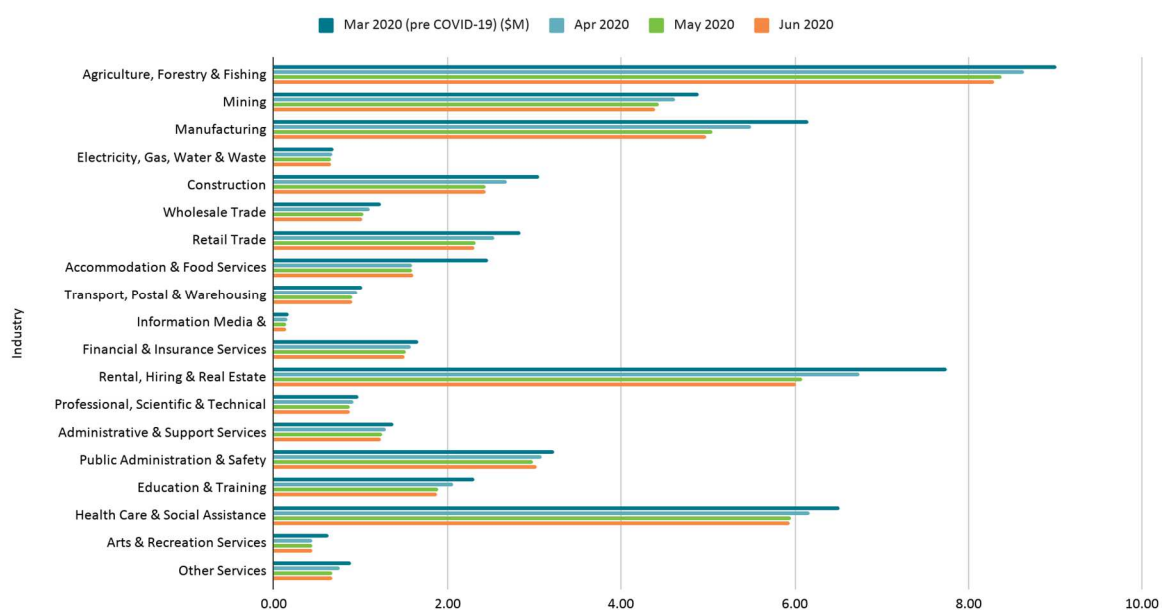


Figure 12: COVID-19 impact on Value added to Northern Grampians economy

Industry	Mar 2020 (pre COVID-19)	Apr 2020	May 2020	Jun 2020
Agriculture, Forestry & Fishing	\$9.020M	\$8.637M	\$8.382M	\$8.298M
Mining	\$4.893M	\$4.618M	\$4.434M	\$4.394M
Manufacturing	\$6.156M	\$5.495M	\$5.054M	\$4.978M
Electricity, Gas, Water & Waste Services	\$0.695M	\$0.673M	\$0.659M	\$0.655M
Construction	\$3.061M	\$2.685M	\$2.434M	\$2.443M
Wholesale Trade	\$1.228M	\$1.111M	\$1.032M	\$1.020M
Retail Trade	\$2.842M	\$2.534M	\$2.329M	\$2.304M
Accommodation & Food Services	\$2.462M	\$1.590M	\$1.597M	\$1.612M
Transport, Postal & Warehousing	\$1.026M	\$0.955M	\$0.907M	\$0.901M
Information Media & Telecommunications	\$0.169M	\$0.151M	\$0.140M	\$0.137M
Financial & Insurance Services	\$1.666M	\$1.577M	\$1.518M	\$1.509M
Rental, Hiring & Real Estate Services	\$7.745M	\$6.753M	\$6.091M	\$6.017M
Professional, Scientific & Technical Services	\$0.974M	\$0.918M	\$0.880M	\$0.874M
Administrative & Support Services	\$1.371M	\$1.299M	\$1.250M	\$1.241M
Public Administration & Safety	\$3.231M	\$3.083M	\$2.985M	\$3.022M
Education & Training	\$2.304M	\$2.060M	\$1.898M	\$1.878M
Health Care & Social Assistance	\$6.510M	\$6.175M	\$5.952M	\$5.942M
Arts & Recreation Services	\$0.631M	\$0.443M	\$0.444M	\$0.451M
Other Services	\$0.889M	\$0.762M	\$0.677M	\$0.669M
Total	\$56.873M	\$51.518M	\$48.663M	\$48.344M

Table 38: COVID-19 impact on Value added to Northern Grampians economy

Mar 2020 (pre COVID-19), Apr 2020, May 2020 and Jun 2020

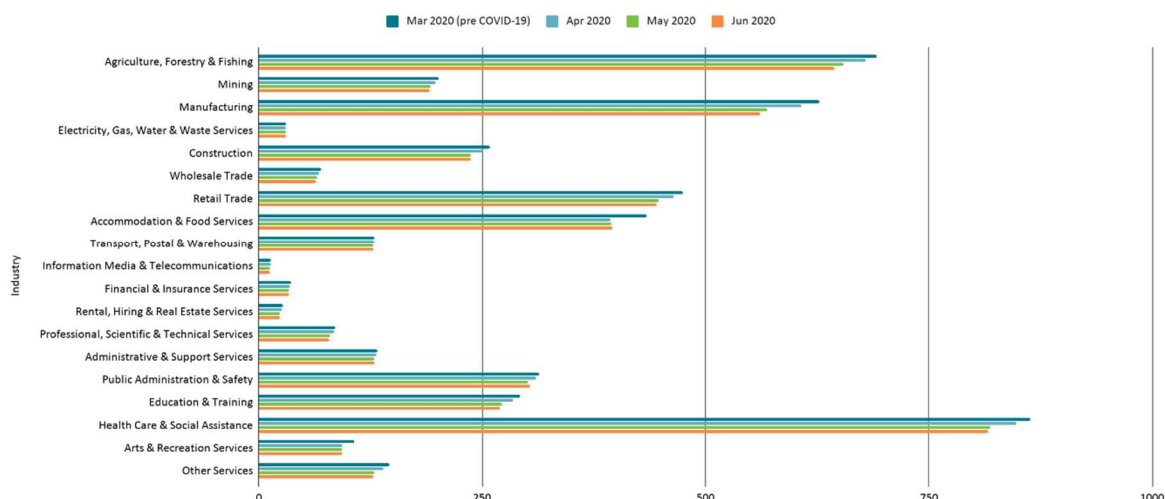


Figure 13: COVID-19 impact on total number of jobs in Northern Grampians economy

Industry	Mar 2020 (pre COVID-19)	Apr 2020	May 2020	Jun 2020
Agriculture, Forestry & Fishing	692	679	655	645
Mining	201	198	193	191
Manufacturing	628	607	569	561
Electricity, Gas, Water & Waste Services	31	31	30	30
Construction	259	251	237	237
Wholesale Trade	70	68	65	64
Retail Trade	475	465	448	446
Accommodation & Food Services	434	394	395	396
Transport, Postal & Warehousing	130	129	128	128
Information Media & Telecommunications	14	14	13	13
Financial & Insurance Services	36	35	34	34
Rental, Hiring & Real Estate Services	27	26	24	24
Professional, Scientific & Technical Services	86	84	80	79
Administrative & Support Services	133	132	129	129
Public Administration & Safety	314	310	302	304
Education & Training	293	285	272	270
Health Care & Social Assistance	864	848	819	817
Arts & Recreation Services	107	93	93	93
Other Services	146	140	129	128
Total	4,940	4,789	4,615	4,589

Table 39: COVID-19 impact on total number of jobs in Northern Grampians economy

Mar 2020 (pre COVID-19) (\$), Apr 2020, May 2020 and Jun 2020

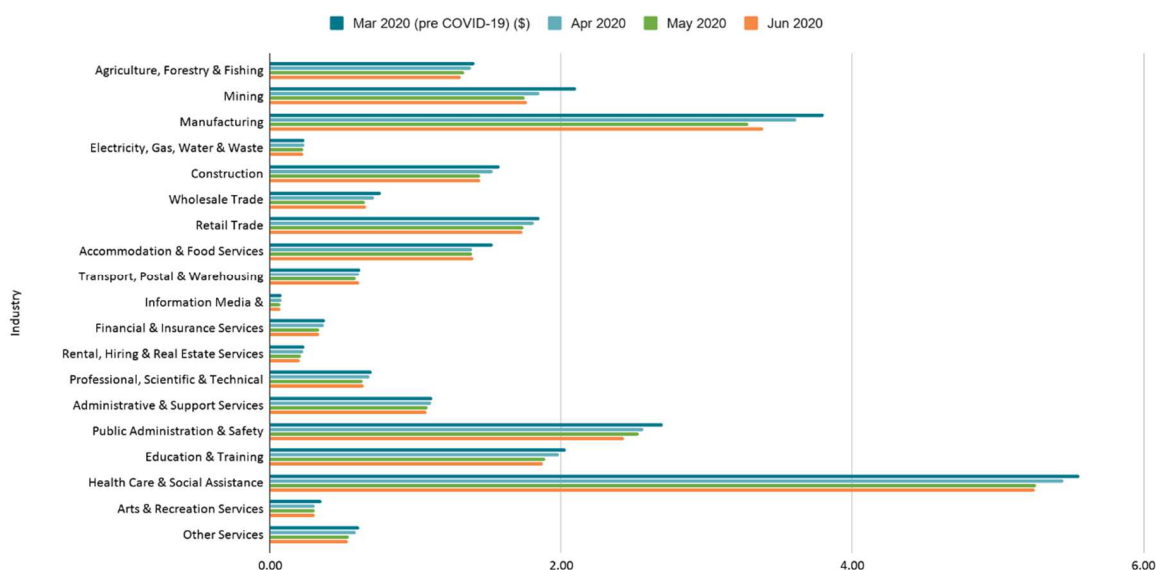


Figure 14: COVID-19 impact on wages and salaries in Northern Grampians economy

Industry	Mar 2020 (pre COVID-19)	Apr 2020	May 2020	Jun 2020
Agriculture, Forestry & Fishing	\$1.407M	\$1.380M	\$1.332M	\$1.311M
Mining	\$2.105M	\$1.850M	\$1.752M	\$1.767M
Manufacturing	\$3.802M	\$3.614M	\$3.283M	\$3.386M
Electricity, Gas, Water & Waste Services	\$0.236M	\$0.235M	\$0.230M	\$0.230M
Construction	\$1.578M	\$1.529M	\$1.443M	\$1.445M
Wholesale Trade	\$0.765M	\$0.718M	\$0.656M	\$0.663M
Retail Trade	\$1.849M	\$1.811M	\$1.744M	\$1.734M
Accommodation & Food Services	\$1.531M	\$1.391M	\$1.393M	\$1.398M
Transport, Postal & Warehousing	\$0.620M	\$0.617M	\$0.592M	\$0.610M
Information Media & Telecommunications	\$0.083M	\$0.081M	\$0.076M	\$0.075M
Financial & Insurance Services	\$0.380M	\$0.371M	\$0.340M	\$0.337M
Rental, Hiring & Real Estate Services	\$0.240M	\$0.230M	\$0.212M	\$0.209M
Professional, Scientific & Technical Services	\$0.701M	\$0.683M	\$0.639M	\$0.643M
Administrative & Support Services	\$1.117M	\$1.105M	\$1.085M	\$1.079M
Public Administration & Safety	\$2.702M	\$2.565M	\$2.536M	\$2.430M
Education & Training	\$2.036M	\$1.983M	\$1.889M	\$1.874M
Health Care & Social Assistance	\$5.557M	\$5.452M	\$5.266M	\$5.256M
Arts & Recreation Services	\$0.353M	\$0.306M	\$0.306M	\$0.308M
Other Services	\$0.613M	\$0.588M	\$0.544M	\$0.538M
Total	\$27.673M	\$26.509M	\$25.321M	\$25.294M

Table 40: COVID-19 impact on wages and salaries in Northern Grampians economy

Mar 2020 (pre COVID-19) (\$M), Apr 2020, May 2020 and Jun 2020

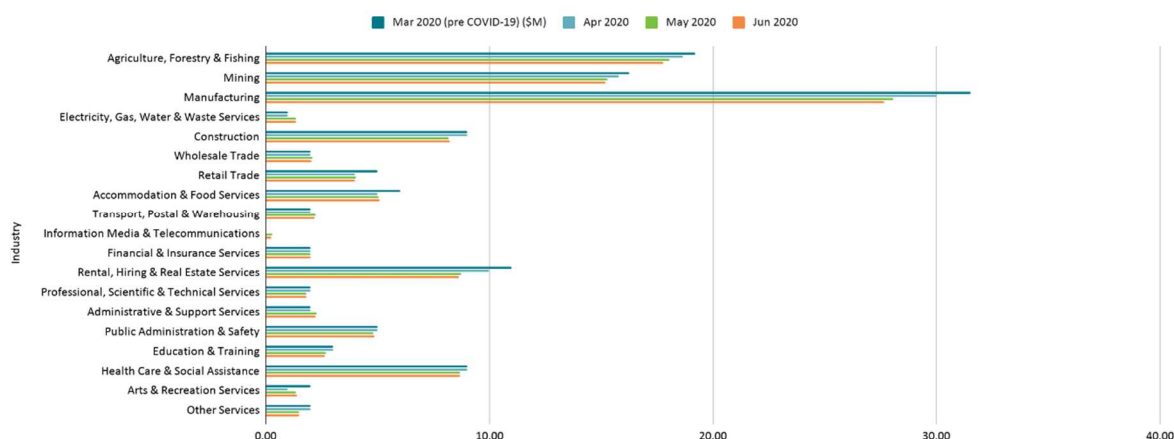


Figure 15: COVID-19 impact on output in Northern Grampians economy

Industry	Mar 2020 (pre COVID-19)	Apr 2020	May 2020	Jun 2020
Agriculture, Forestry & Fishing	\$19.222M	\$18.643M	\$18.039M	\$17.801M
Mining	\$16.249M	\$15.802M	\$15.313M	\$15.185M
Manufacturing	\$31.548M	\$30.034M	\$28.077M	\$27.661M
Electricity, Gas, Water & Waste Services	\$1.426M	\$1.397M	\$1.371M	\$1.365M
Construction	\$9.355M	\$8.785M	\$8.191M	\$8.208M
Wholesale Trade	\$2.369M	\$2.221M	\$2.089M	\$2.066M
Retail Trade	\$4.651M	\$4.307M	\$4.036M	\$4.002M
Accommodation & Food Services	\$6.257M	\$5.039M	\$5.052M	\$5.079M
Transport, Postal & Warehousing	\$2.358M	\$2.279M	\$2.220M	\$2.211M
Information Media & Telecommunications	\$0.320M	\$0.298M	\$0.279M	\$0.274M
Financial & Insurance Services	\$2.186M	\$2.087M	\$2.008M	\$1.995M
Rental, Hiring & Real Estate Services	\$10.726M	\$9.611M	\$8.731M	\$8.625M
Professional, Scientific & Technical Services	\$1.976M	\$1.894M	\$1.811M	\$1.796M
Administrative & Support Services	\$2.405M	\$2.323M	\$2.255M	\$2.240M
Public Administration & Safety	\$5.116M	\$4.943M	\$4.800M	\$4.847M
Education & Training	\$3.152M	\$2.887M	\$2.685M	\$2.659M
Health Care & Social Assistance	\$9.422M	\$9.032M	\$8.711M	\$8.696M
Arts & Recreation Services	\$1.702M	\$1.370M	\$1.373M	\$1.384M
Other Services	\$1.817M	\$1.652M	\$1.500M	\$1.484M
Total	\$132.257M	\$124.604M	\$118.541M	\$117.580M

Table 41: COVID-19 impact on output in Northern Grampians economy