Central West Investigation Area

Socioeconomic Profile

Prepared for the

Victorian Environmental Assessment Council

by

Gillespie Economics

Tel: (02) 9804 8562

Email: gillecon@bigpond.net.au

Web: gillespieeconomics.com.au

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1. Introduction

On 20 March 2017, the Victorian Environmental Assessment Council (VEAC) was requested to conduct a Central West Investigation.

The investigation covers public land in the vicinity of the Wombat, Wellsford, Mount Cole and Pyrenees Range forests.

The purpose of the investigation is to:

a) identify and evaluate the condition, natural and biodiversity values and cultural, social and economic values and the current uses of public land in the specified area; and

b) make recommendations for the balanced use and appropriate management arrangements to conserve and enhance the natural and cultural values.

This report identifies the socioeconomic profile of the regions in which each of the public land areas is located. The Mount Coal and Pyrenees Range forests and public lands are located primarily within the Pyrenees LGA. The Wellsford forests and public lands are located within the Greater Bendigo LGA, while Wombat forests and public lands are located primarily within the Local Government Areas (LGAs) of Hepburn, Moorabool and Macedon Ranges.

Demographic data for each region is primarily compared to demographic data for the Rest of Victoria Greater Capital City Statistical Area (GCCSA), although it is recognised that part of the Hepburn, Moorabool and Macedon Ranges LGAs straddle the boundary between the Rest of Victoria GCCSA and the Greater Melbourne GCCSA.

The socioeconomic profiles are based on the 2016 ABS Census of Population and Housing, unless otherwise stated. The demographic profile is based on Census data for the Usual Residents of the regions while the economic profile is based on the Place of Work Census data for the regions.

2. Pyrenees Local Government Area

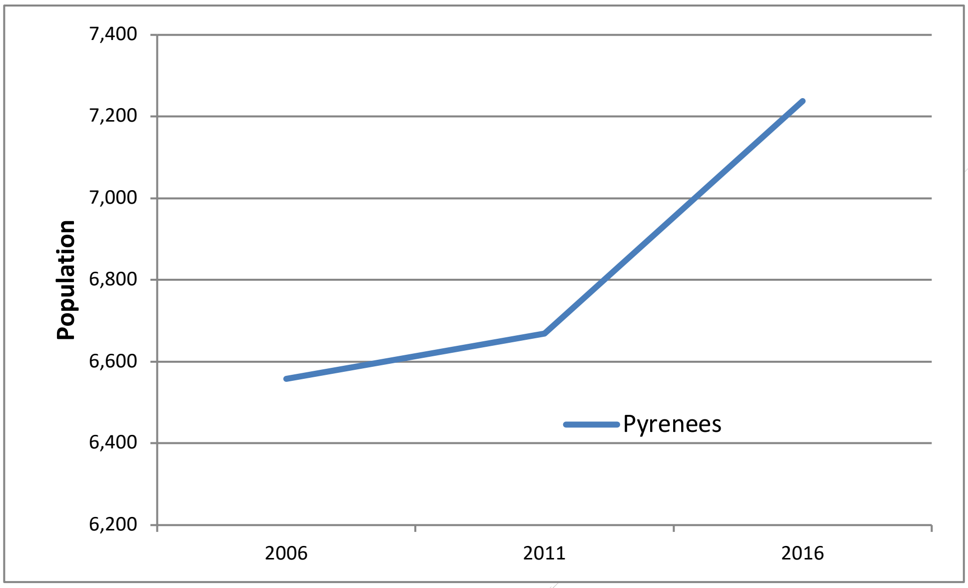
2.1. Demographic Profile of Residents

Population

Population Levels and Historic Growth

In 2016 the population of Pyrenees LGA was 7,238. From 2011 to 2016 the population grew by 8.5%, which was considerably greater than population growth between 2006 and 2011 i.e. 1.7% (refer to Figure 1). This was less than the population growth rates for Victoria (8.5% between 2006 and 2011 and 10.7% between 2011 and 2016) .

Figure 1 Historical Population of the Region

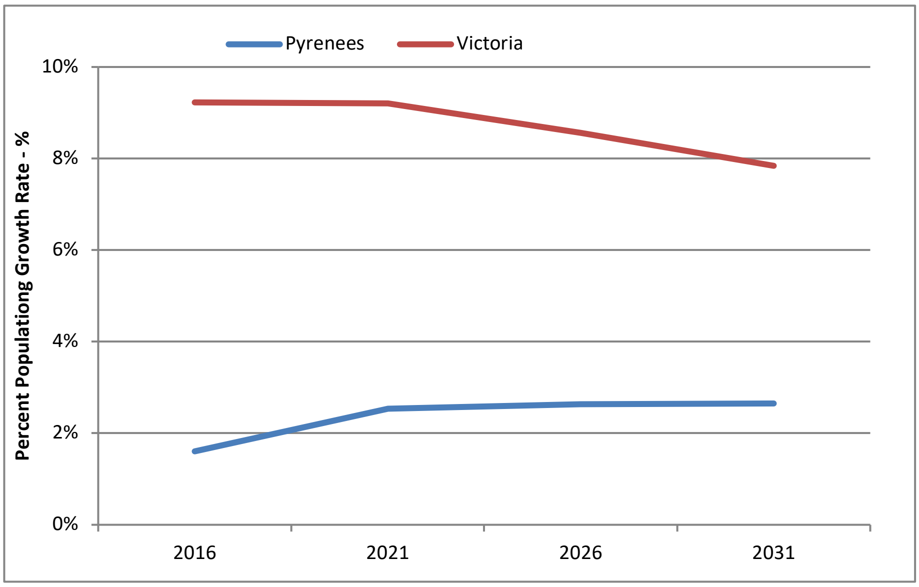


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Population Growth Projections

The region is forecast to continue to have population growth rates less than that for Victoria i.e. 2.5% to 2.7% per intercensal period compared to 7.8% to 9.2% for Victoria - see Figure 4.

Figure 2 Population Growth Rate Forecasts



Source: Victorian Department of Environment, Land and Water Planning (2011) Victoria in Future 2016

Indigenous Population

1.9% of the population are Aboriginal and/or Torres Strait Island people, compared to 1.6% of the regional population of Victoria and 0.8% of the population Victoria.

Ethnicity and Language

81.5% of the population were born in Australia, with the next most common countries of birth being England (3.6%) and New Zealand (1%).

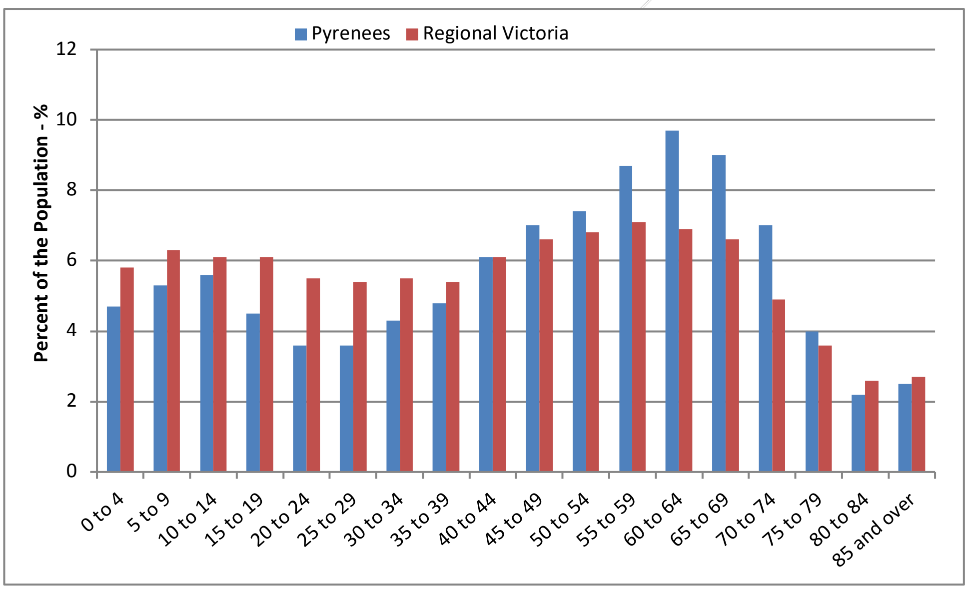
3.6% of households spoke a language other than English at home, with the main languages being Dutch, French, Greek, Spanish and Vietnamese.

Age Profile

In 2016, the median age of the Pyrenees LGA was 50, higher than the median age for regional Victoria (43) and Victoria (37).

Regional Victoria has a higher percentage of the population in the 5 to 19 age bracket and the 50+ age brackets. The 'hollowing-out' of the work force age groups might reflect the out-movement of these workers and also of young adults to Melbourne for work and post-school education, a common phenomenon across regional Australia. Compared to regional Victoria (Figure 4), the Pyrenees has an even higher proportion of the population in the 45+ age brackets, indicating the aged population of this region.

Figure 3 Pyrenees LGA Population Age Distribution vs Regional Victoria

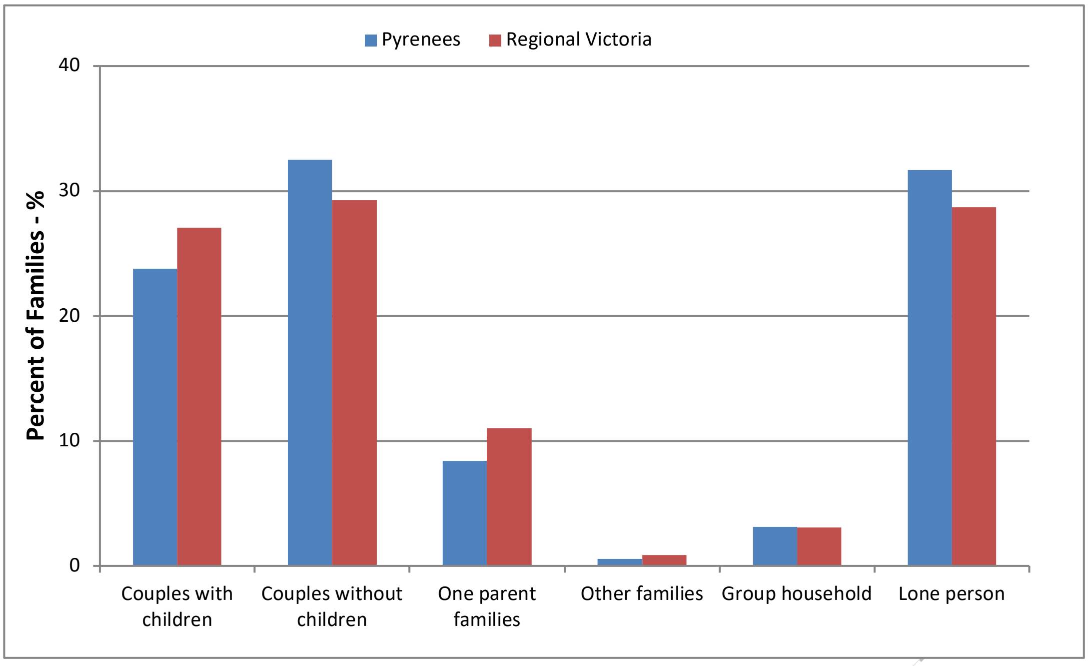


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Family composition

Compared with Regional Victoria, the Pyrenees LGA has a higher proportion of couple families without children and lone person households, reflecting the aged population of the region. Refer to Figure 4.

Figure 4 Family Composition for the Pyrenees LGA and Regional Victoria



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Housing

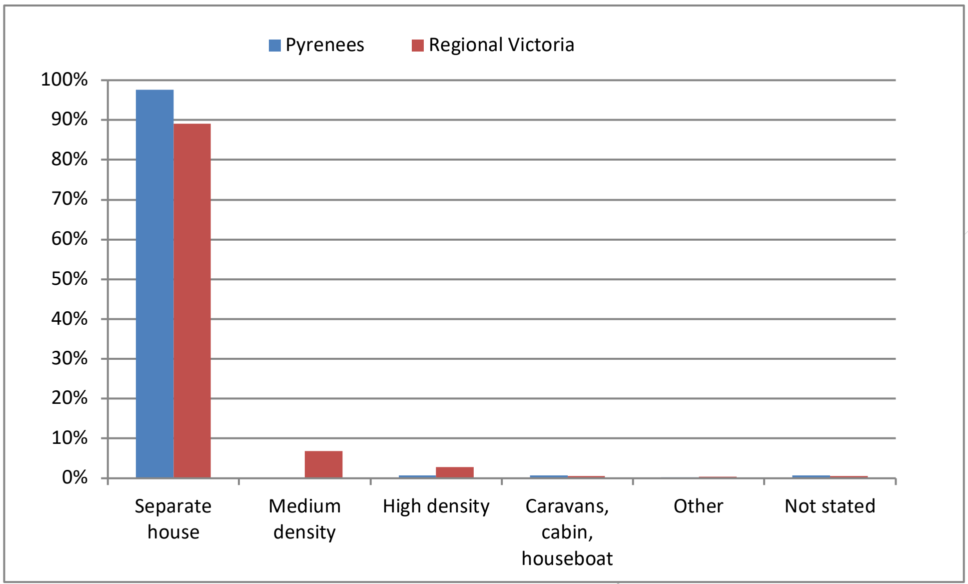
Private Dwellings and Occupancy

In the Pyrenees LGA there were 3,344 private dwellings in 2016 with 81.3% of these occupied, slightly less than the proportion occupied across regional Victoria (82.9%).

Dwelling Types

The Pyrenees LGA has a higher proportion of occupied separate houses than regional Victoria.

Figure 5 Occupied Dwelling Types



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Rent

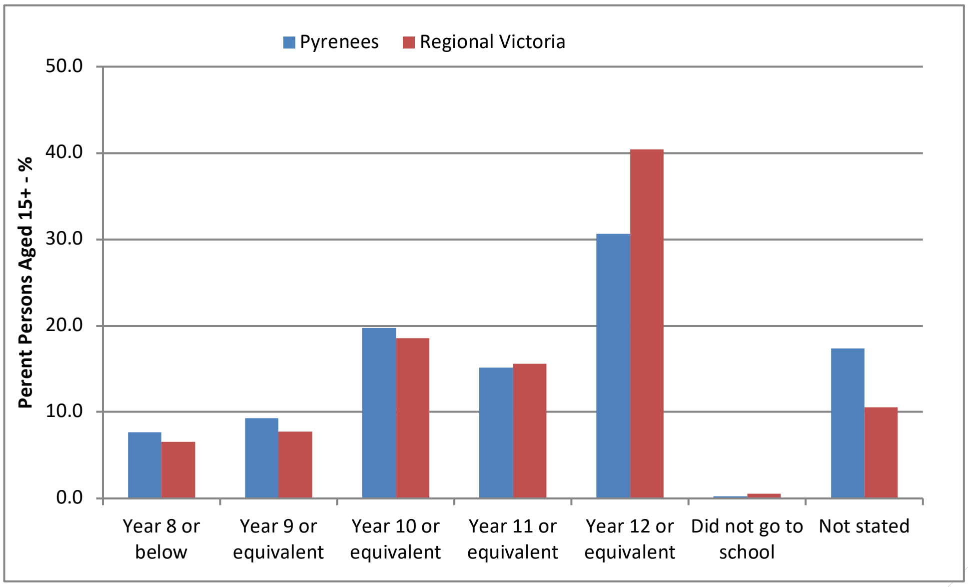
The median rent for the region was $160 per week, less than the median weekly rent for regional Victoria ($231) and Victoria ($325).

Education & Employment

Education

Compared with Regional Victoria, the Pyrenees LGA had a lower proportion of people who completed Year 12 or equivalent and a higher proportion who finished school in year 10 or earlier —see
Figure 6. However, the high proportion who did not state their highest level of schooling may distort this result.

Figure 6 Highest level of schooling

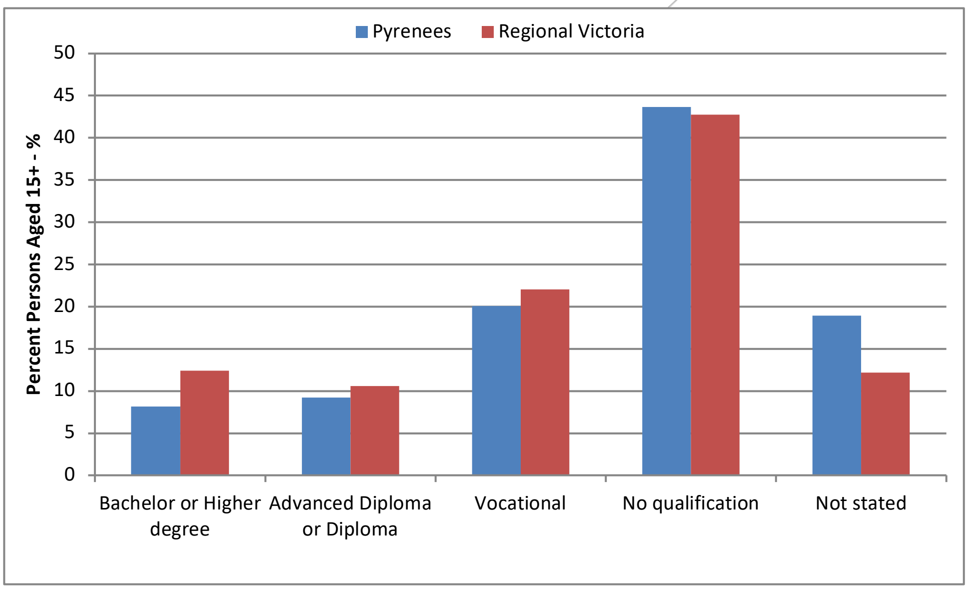


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Compared to Regional VICTORIA, in 2016 the Pyrenees LGA had a higher proportion of people with no qualification and a lower proportion with any form of qualifications– see

Figure 7. However, the high proportion who did not state their qualification may distort this result.

Figure 7 Highest qualification



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

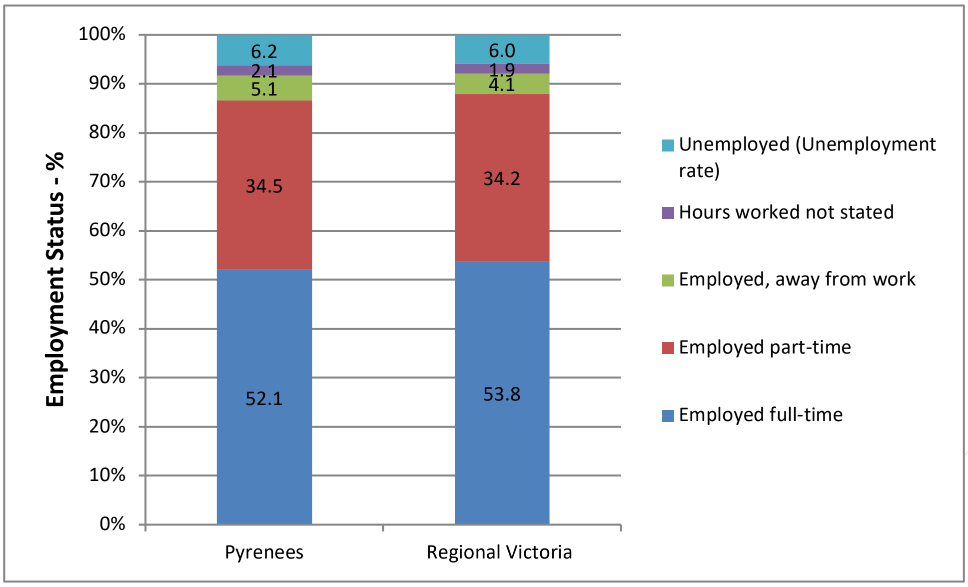
Employment Growth for Usual Residents

In 2016, 2,671 of the usual residents of the Pyrenees LGA were employed. The usual resident labour force grew by 1.7% between 2006 and 2011, and 1.9% between 2011 and 2016. At the same time the usual residents employed grew by 2.5% and 2.6% respectively. Hence, there was a decline in unemployed usual residents.

Employment Status

In 2016, the Pyrenees LGA had a higher proportion of the labour force employed in part-time jobs than regional Victoria but a lower proportion in full-time jobs. Overall it had a slightly higher unemployment rate than regional Victoria.

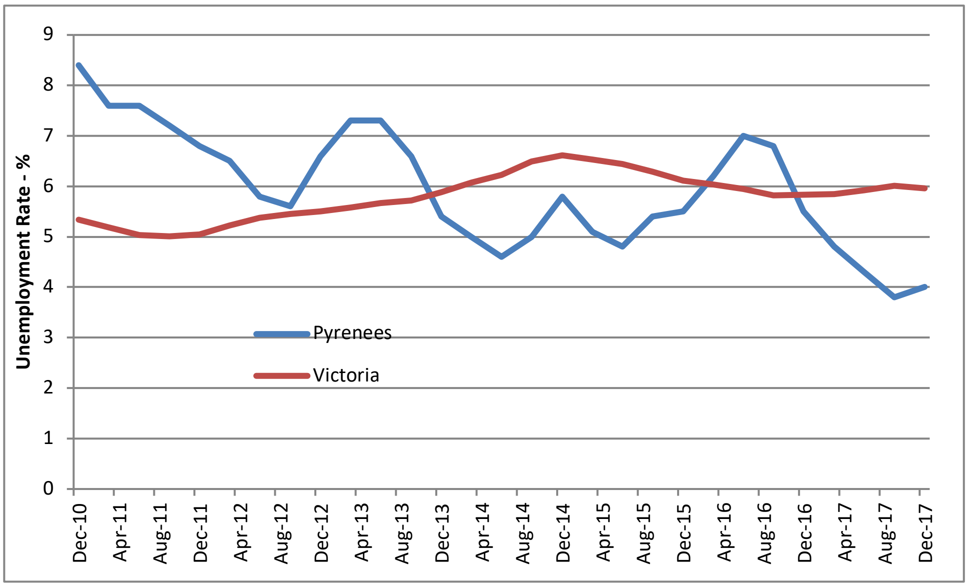
Figure 8 Employment Status



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

The Department of Employment's Small Area Labour Markets publication (see Figure 4) indicates that unemployment in the region has historically been higher than that for Victoria but since late 2013 had generally been below that for Victoria.

Figure 9 Unemployment Rates over Time



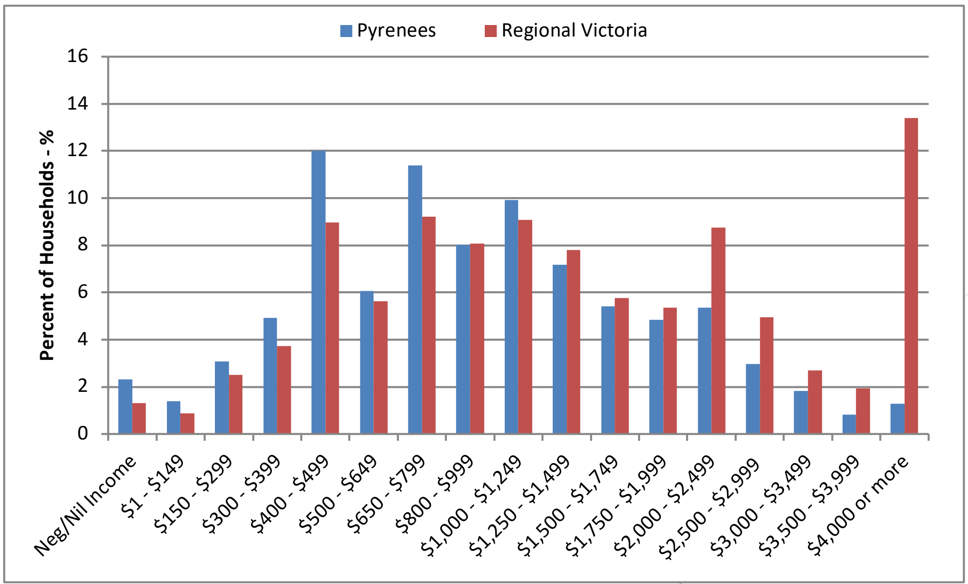
Source: Department of Employment, Small Area Labour Markets (December 2017)

Income

In 2016, the median household income for the region was $876 compared to $1,124 for regional Victoria and $1,419 for Victoria.

The distribution of weekly household income relative to Regional Victoria is given in Figure 4. This indicates that the region had a higher proportion of low income households (those earning less than 1,000 per week or more) and a lower proportion earning $1,000 per week or more.

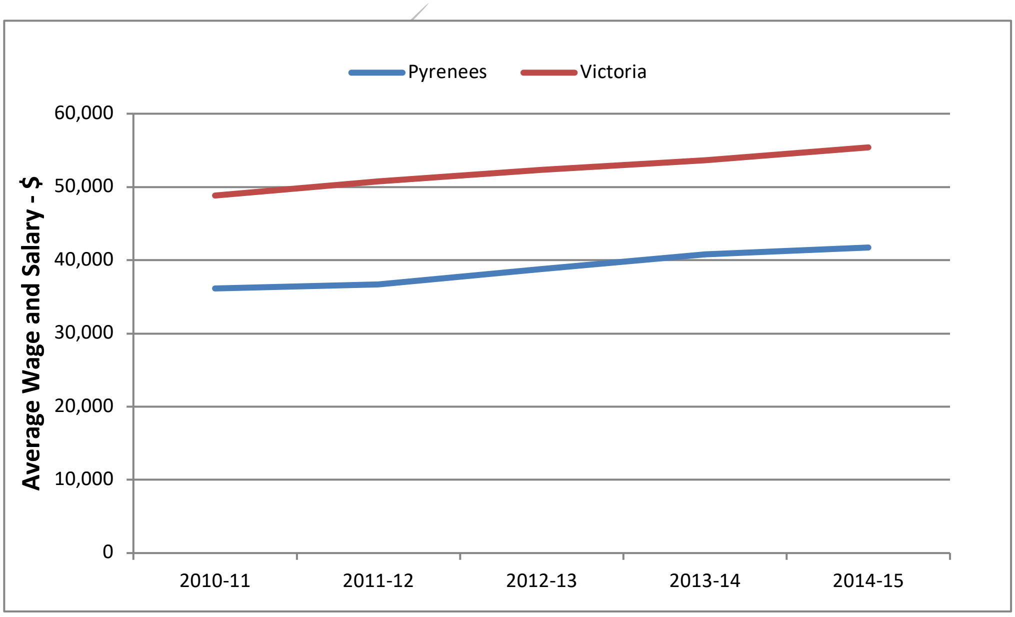
Figure 10 Weekly Household Income Distribution



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Historically, average wage and salary income in the Pyrenees LGA has been below that for Victoria– see Figure 4.

Figure 11 Average Wage and Salary Income



Source: ABS, Catalogue Number: 6524.0.55.002 Estimates of Personal Income for Small Areas, 2011-

Occupation

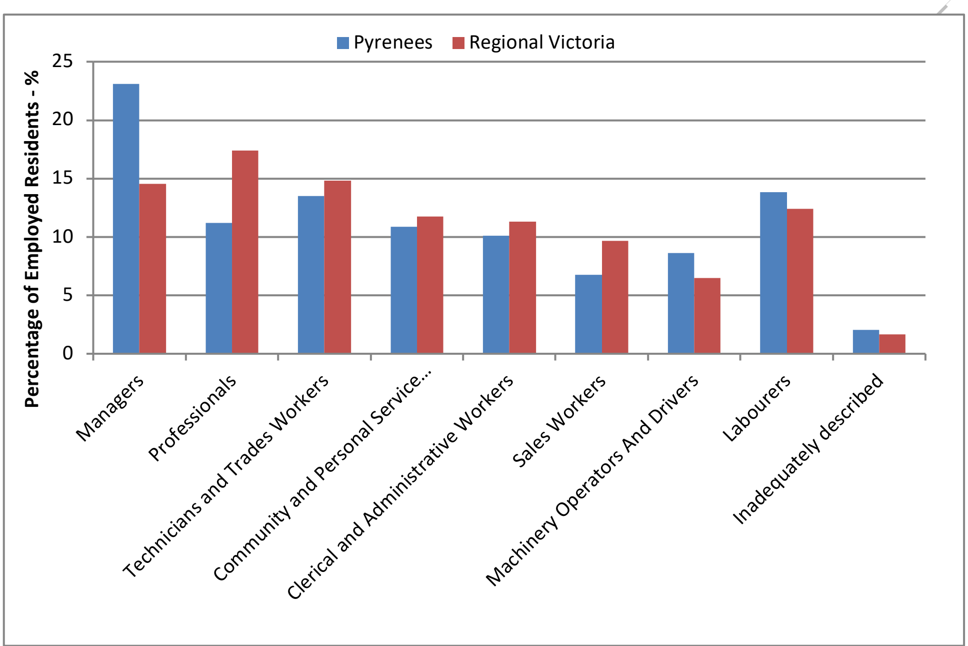
Compared to Regional Victoria, in 2016 the Pyrenees LGA had a relatively higher proportion of its resident labour force workers employed as:

- Managers;
- Machinery Operators and Drivers; and
- Labourers - see Figure 12.

Comparatively, the region had a lower proportion of its workers employed as:

- Professionals;
- Technicians and Trade Workers;
- Community and Personal Service Workers; and
- Sales Workers.

Figure 12 Occupations



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Workforce Location

48% of the employed usual residents of the region commute to work outside the region. The main destination is Ballarat.

Table 1 Work Location of Employed Usual Residents of the Pyrenees LGA

LGA	%
Pyrenees (S)	52%
Ballarat (C)	25%
No Fixed Address (Vic.)	6%
Ararat (RC)	5%
Central Goldfields (S)	5%

Northern Grampians (S)	2%
Corangamite (S)	1%
Melbourne (C)	1%
Golden Plains (S)	1%

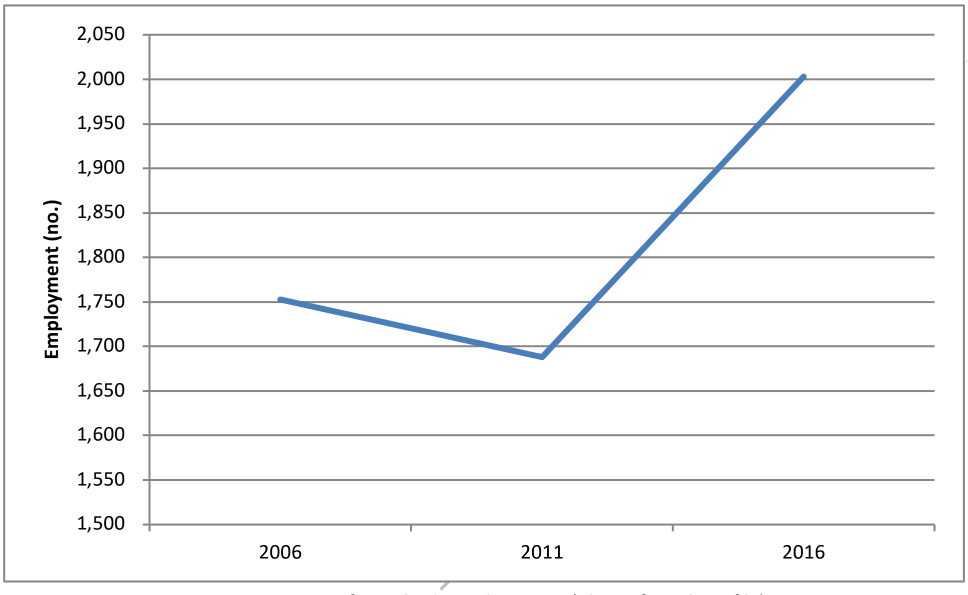
Source: ABS Tablebuilder 2016 Census

2.2. Economic Profile

Employment Growth

In 2016, there were 2003 jobs located in the Pyrenees LGA, less than the labour force residing in the region and less than the employed labour residing in the region. Employment in the Pyrenees LGA declined between 2006 and 2011 by 4% and then grew by 19% between 2011 and 2016. As identified, in Figure 12 to Figure 12 this appears to be largely associated with growth in employment in Correctional and Detention Services.

Figure 13 Employment Growth in the Region



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Source of Workers

In 2016, 70% of jobs in the region were filled by those residing in the region. Those who work in the region, but live outside it, are predominantly from Ballarat LGA (18%).

Table 2 Residential Location of Workers Employed in the Region

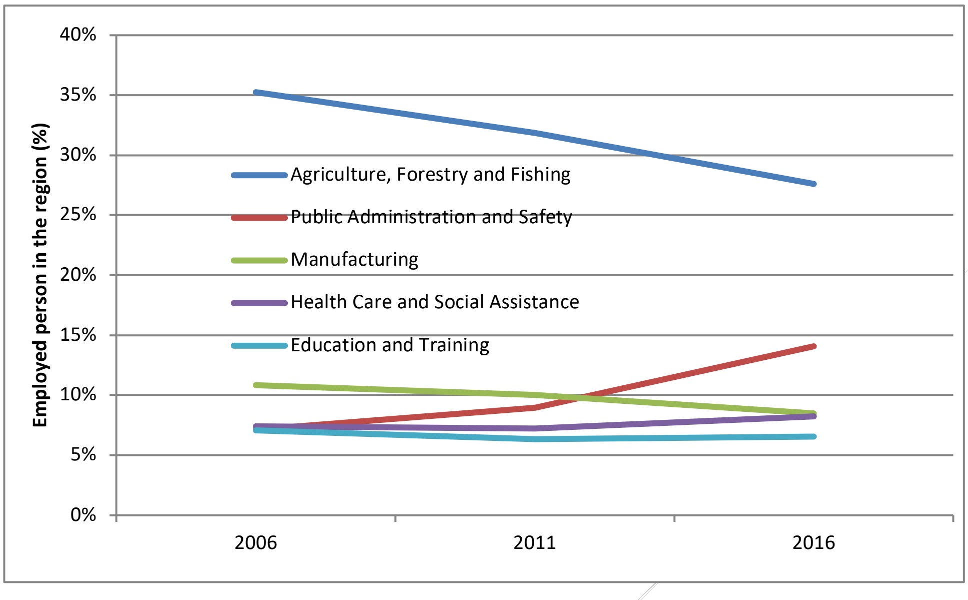
LGA	%
Pyrenees (S)	70%
Ballarat (C)	18%
Central Goldfields (S)	4%
Moorabool (S)	2%
Ararat (RC)	2%
Golden Plains (S)	2%
Northern Grampians (S)	1%
Hepburn (S)	1%

Source: ABS Tablebuilder 2016 Census

Industry Employment Share

As shown in
Figure 14, historically, by far the largest employing industry in the region has been Agriculture, Forestry and Fishing. The relative significance of employment in this sector declined between 2006 and 2016. Manufacturing has historically been the second largest employer but its relative significance to employment in the region has declined since 2006 to be the third most significant employing sector. The significance of Public Administration and Safety has grown substantially and it is now the second largest employment sector in the region. Education and Training and Health Care and Social assistance are the fourth and fifth largest employers.

Figure 14 Historical Employment of the five largest ANZSIC Level 1 industries in Pyrenees LGA



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Employment by Industry, Growth and Specialisations

Figure 12 to Figure 12 summarise:

- employment by industry sector at each level of the ANZSIC Industry Classification;
- growth in percentage employment from 2011 to 2016; and
- level of industry specialisation;

for sectors that represent more than 1% of employment in the Pyrenees LGA.

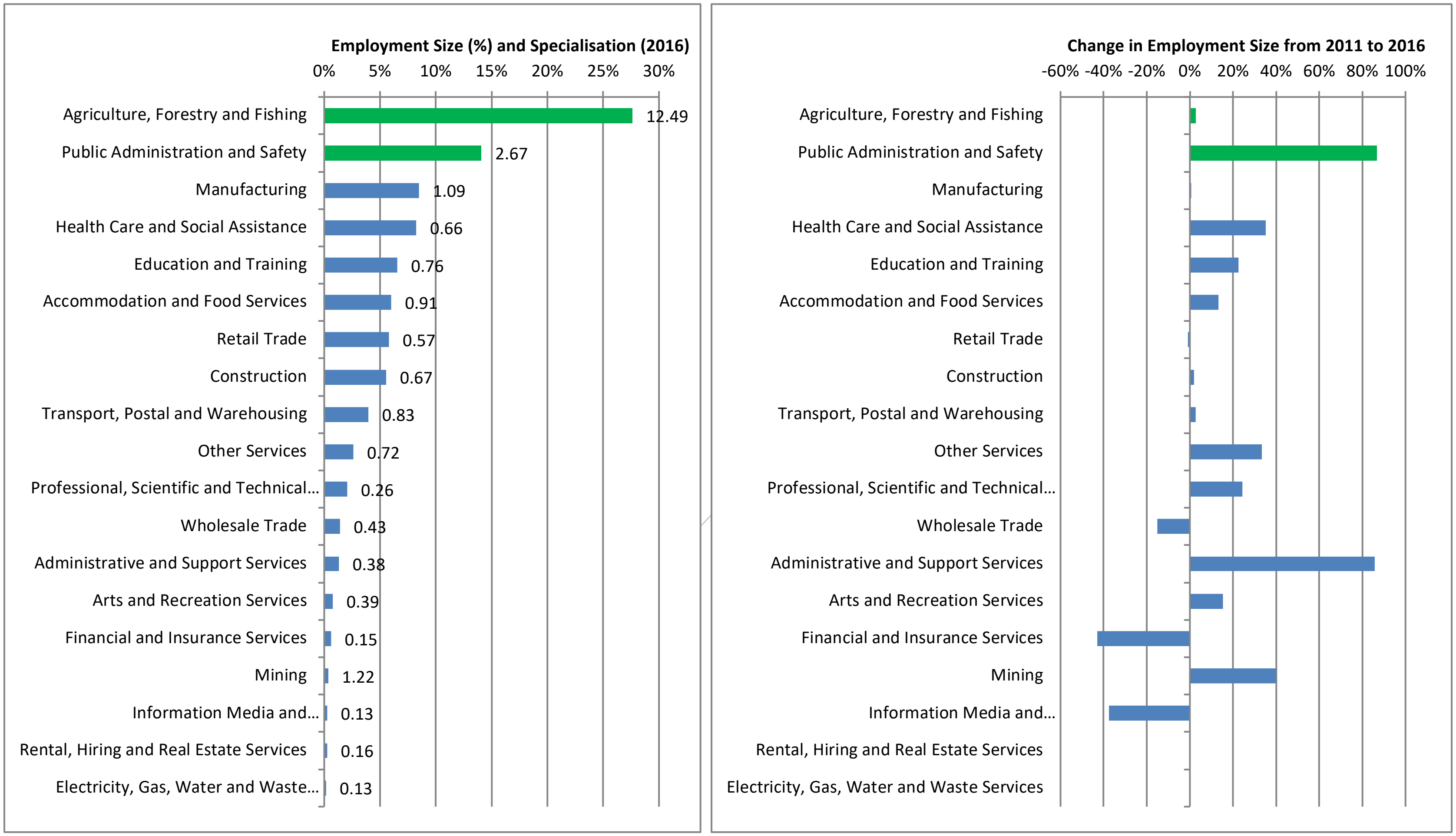
Level of industry specialisation was determined using Location Quotients (LQs) which measure the employment concentration in industry sectors within a regional economy, compared with the same sectors across the State, in this case Victoria. Generally, a LQ greater than 1.25 is taken as initial evidence of regional specialisation and that the industry has potential to be classified as an exporter (i.e. servicing more than just the regional population). The higher the LQ, the more specialised a region is in that industry relative to Victoria.

It is the sufficiently large (greater than 1% of employment) specialisation sectors that that produce goods and services that are traded outside the region (i.e. exported and so are generally non-population serving industries), and have a reliance on local endowments, that are the key 'engines of growth' of regional economies. 'Enabling industries' provide specialised inputs to engine industries e.g. repairs and maintenance, transport etc, while 'population serving' industries generally service the retail and personal services needs of the population. 'Engines of growth' can also include population serving industries where they are servicing more than just the local population e.g. Hospital Sector, Accommodation and Food Service where it is partly catering to tourists.

Based on Figure 12 to Figure 12 it is evident that the key engines of growth in the Pyrenees LGA economy are:

- Agriculture, Forestry and Fishing - predominantly Sheep, Beef Cattle and Grain Farming, but also Fruit and Tree Nut Growing and Grape Growing;
- Public Order, Safety and Regulatory Services - predominantly Correction and Detention Services;
- Beverage Manufacturing - predominantly Wine and Other Alcoholic Beverage Manufacturing.

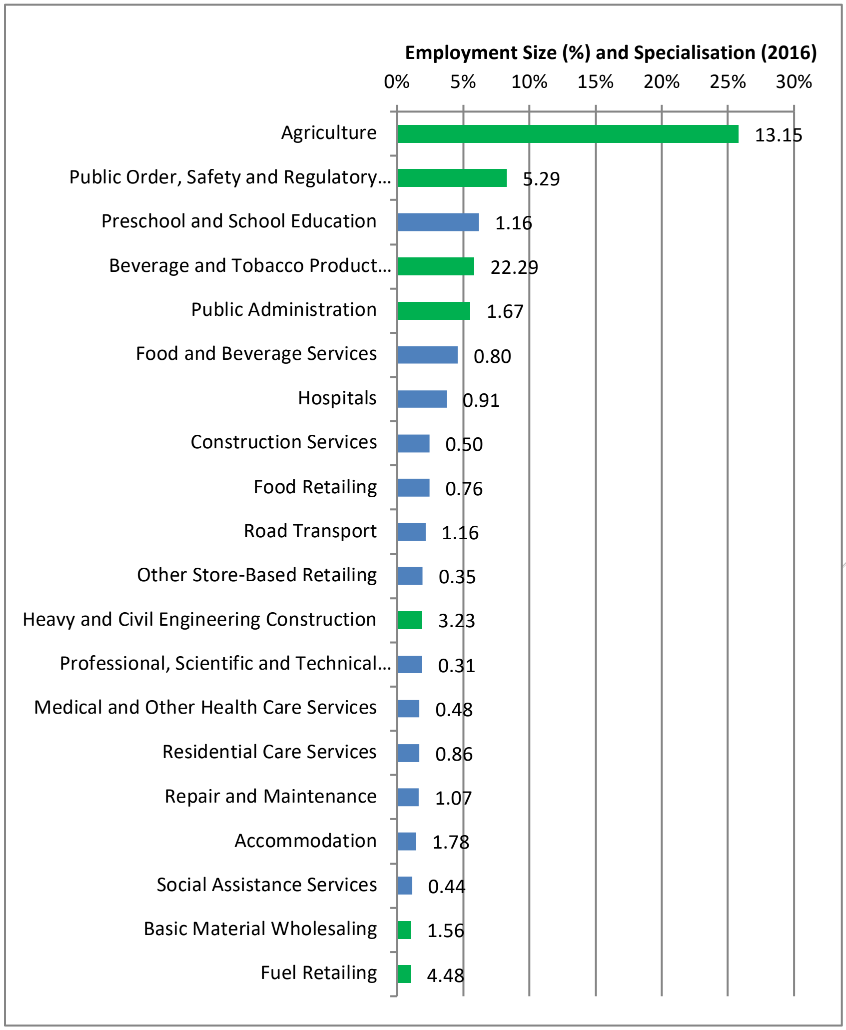
Figure 15 ABS 1 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size

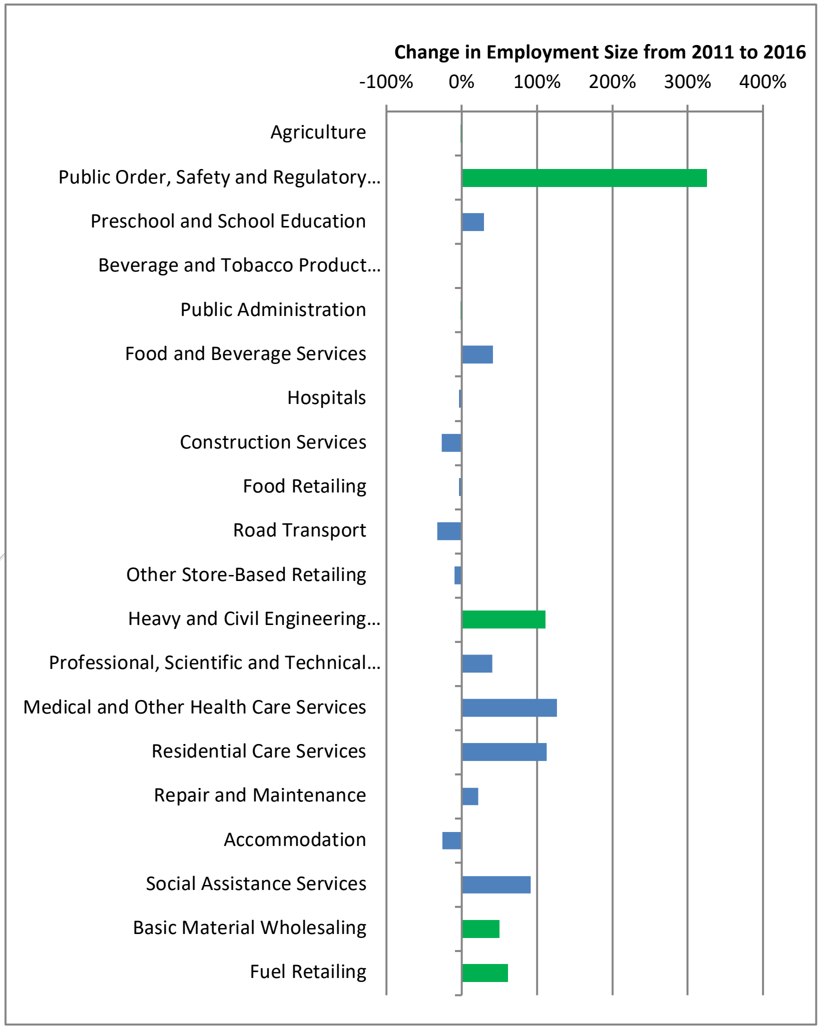


Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

Figure 16 ABS 2 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size

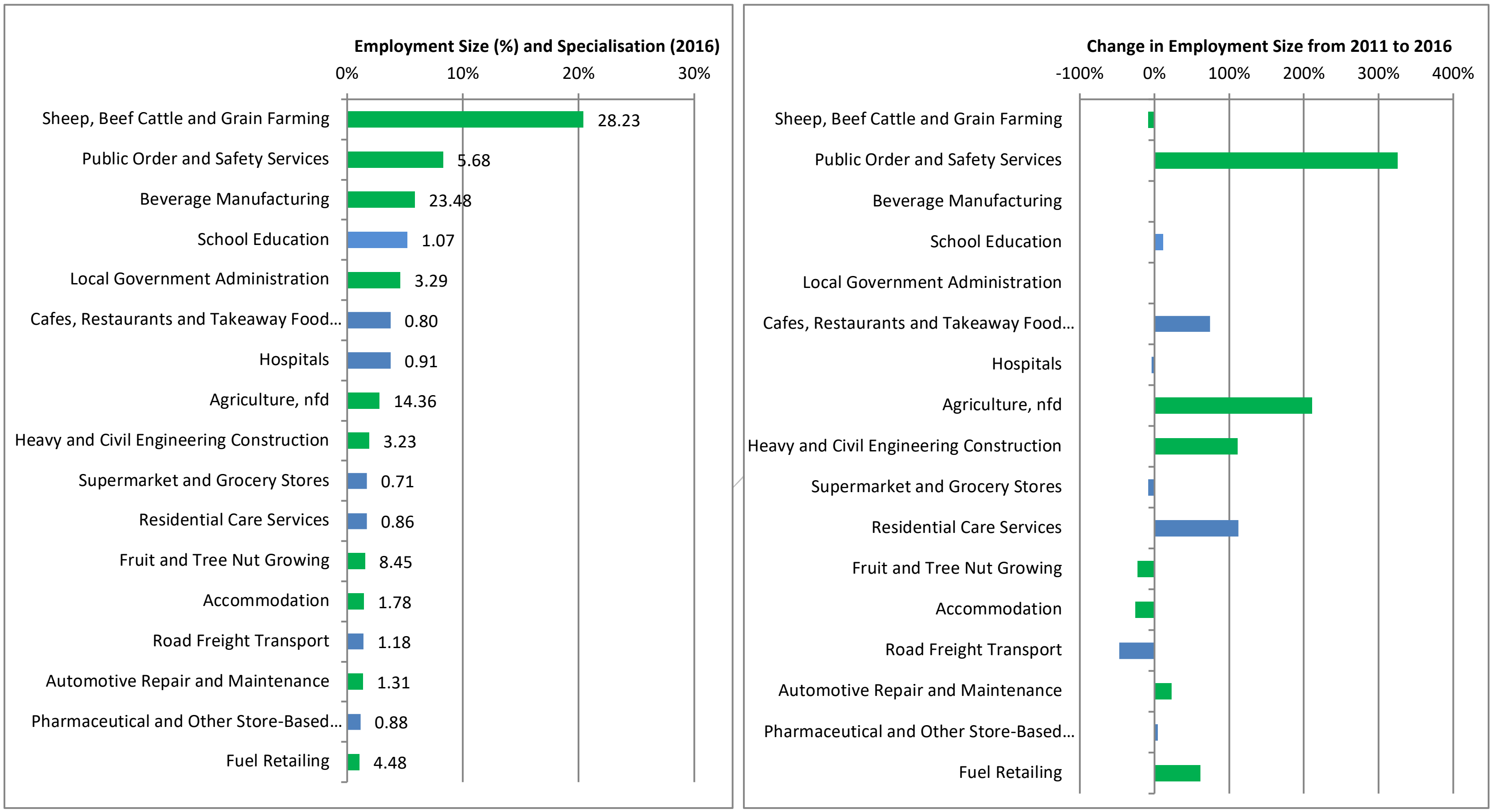




Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

Figure 17 ABS 3 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

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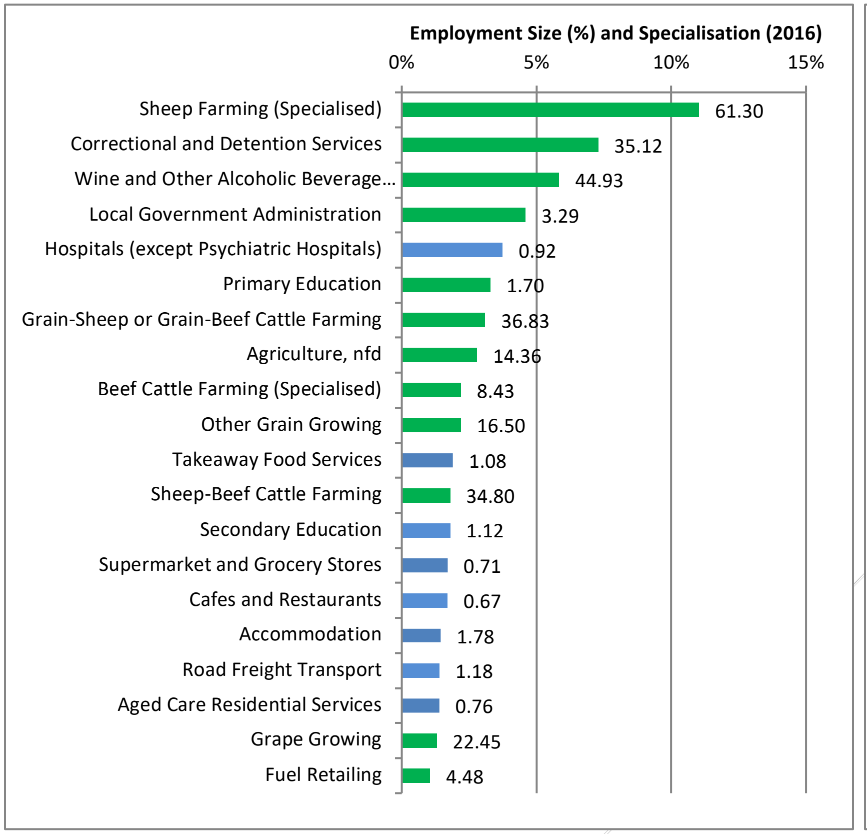
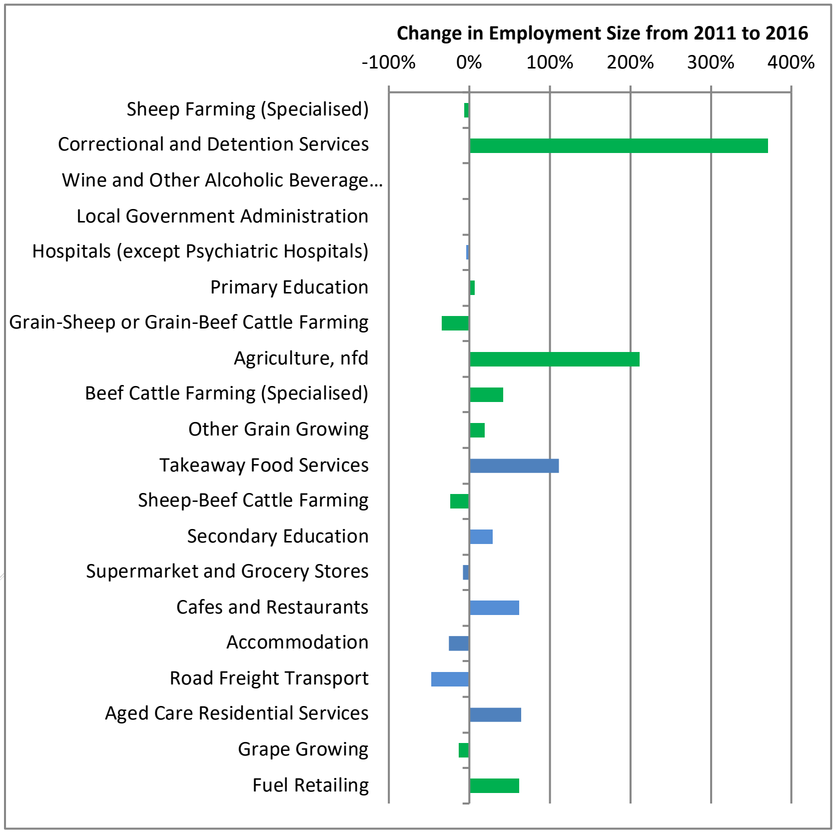
Figure 18 ABS 4 Digit Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size





Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

3. Greater Bendigo Local Government Area

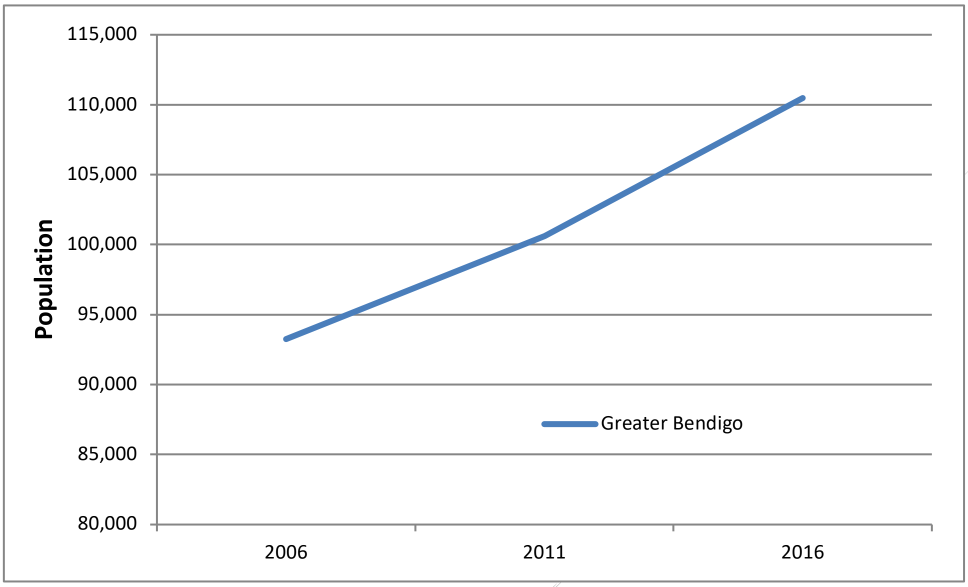
3.1. Demographic Profile of Residents

Population

Population Levels and Historic Growth

In 2016 the population of Greater Bendigo LGA was 110,477. The population grew by 7.9%% between 2006 and 2011 and 9.8% between 2011 and 2016 (refer to Figure 1). This was slightly less than the population growth rates for Victoria (8.5% between 2006 and 2011 and 10.7% between 2011 and 2016) .

Figure 19 Historical Population of the Region

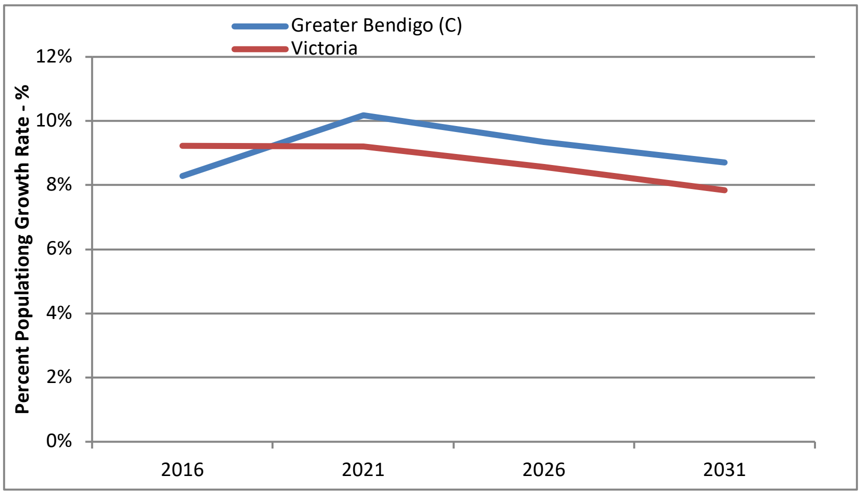


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Population Growth Projections

The region is forecast to have population growth rates greater than that for Victoria i.e. 8.7% to 10.2% per intercensal period compared to 7.8% to 9.2% for Victoria - see Figure 4.

Figure 20 Population Growth Rate Forecasts



Source: Victorian Department of Environment, Land and Water Planning (2011) Victoria in Future 2016

Indigenous Population

1.7% of the population are Aboriginal and/or Torres Strait Island people, compared to 1.6% of the regional population of Victoria and 0.8% of the population Victoria.

Ethnicity and Language

84.5% of the population were born in Australia, with the next most common countries of birth being England (1.8%) and New Zealand (0.7%).

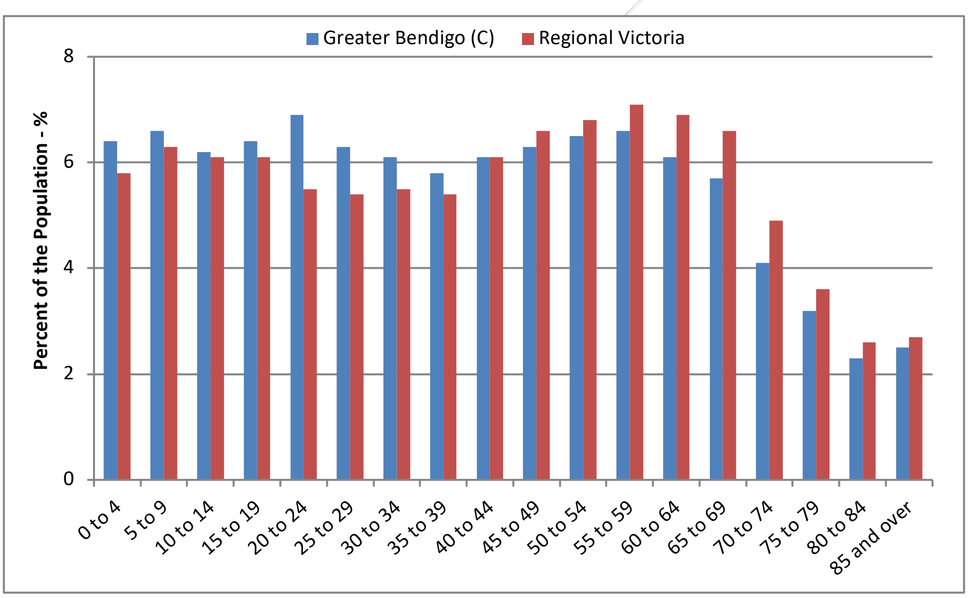
5.6% of households spoke a language other than English at home, with the main languages being Karen, Mandarin, Italian, Malayalam and Punjabi.

Age Profile

In 2016, the median age of the Greater Bendigo LGA was 39, lower than the median age for regional Victoria (43) and Victoria (37).

Regional Victoria has a higher percentage of the population in the 5 to 19 age bracket and the 50+ age brackets. The 'hollowing-out' of the work force age groups might reflect the out-movement of these workers and also of young adults to Melbourne for work and post-school education, a common phenomenon across regional Australia. Compared to regional Victoria (Figure 4), the Greater Bendigo LGA has a higher proportion of people in the less than 40 age bracket and a lower proportion in the of people in the 45+ age brackets. It has a younger age profile than regional Victoria

Figure 21 Greater Bendigo LGA Population Age Distribution vs Regional Victoria

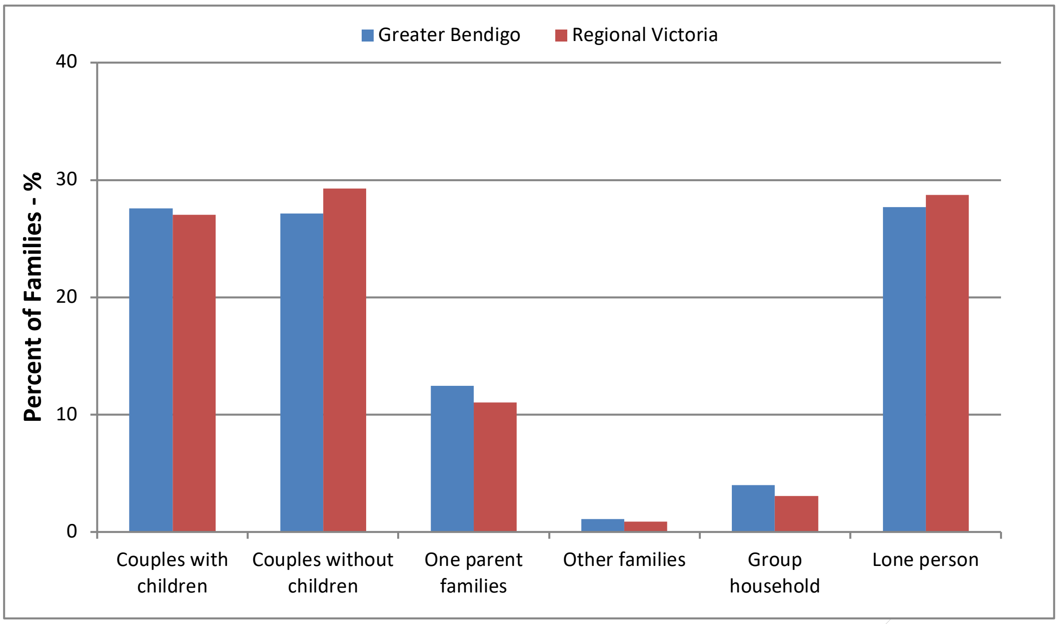


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Family composition

Compared with Regional Victoria, the Greater Bendigo LGA has a higher proportion of couple families with children, one parent families and group households. Refer to Figure 4.

Figure 22 Family Composition for the Greater Bendigo LGA and Regional Victoria



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Housing

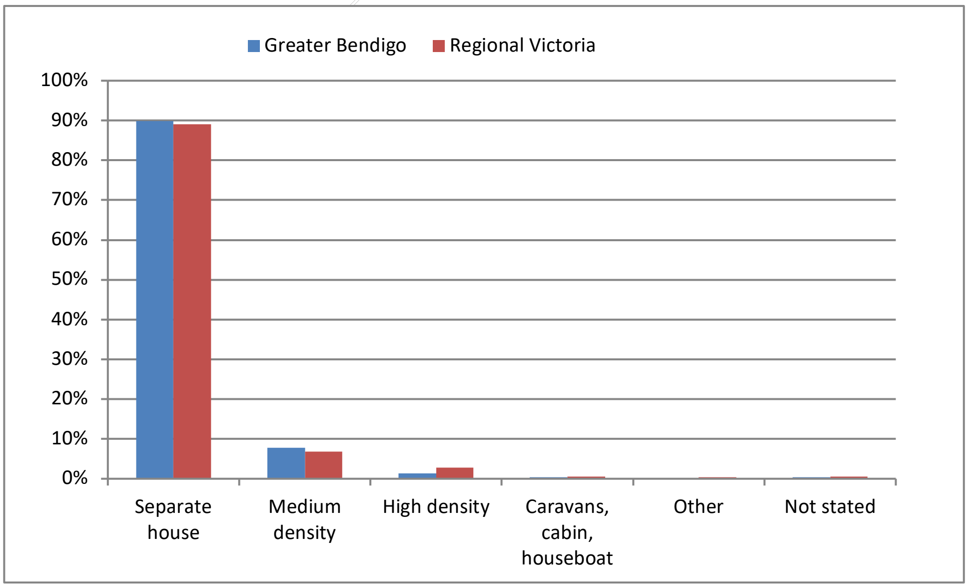
Private Dwellings and Occupancy

In the Greater Bendigo LGA there were 46,359 private dwellings in 2016 with 89.2% of these occupied, more than the proportion occupied across regional Victoria (82.9%).

Dwelling Types

The Greater Bendigo LGA has a higher proportion of occupied separate houses and medium density houses than regional Victoria.

Figure 23 Occupied Dwelling Types



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Rent

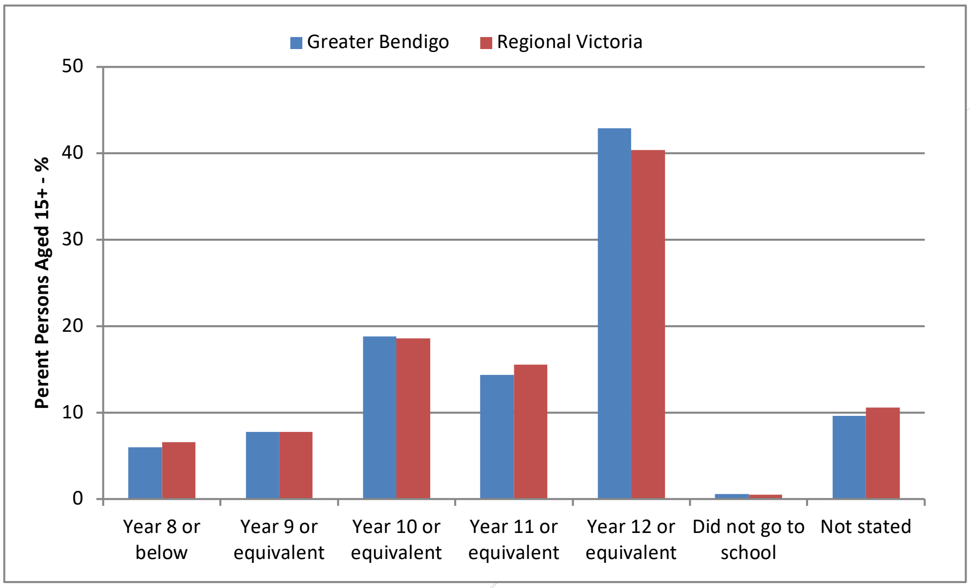
The median rent for the region was $250 per week, greater than the median weekly rent for regional Victoria ($231) and lower than that for Victoria ($325).

Education & Employment

Education

Compared with Regional Victoria, the Greater Bendigo LGA had a higher proportion of people who completed Year 12 or equivalent —see
Figure 6.

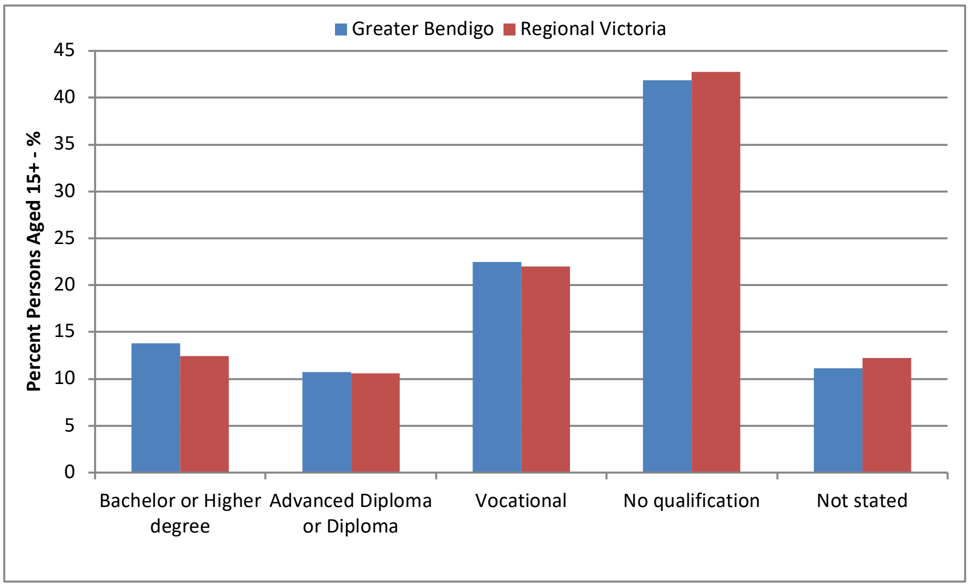
Figure 24 Highest level of schooling



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Compared to Regional Victoria, in 2016 the Greater Bendigo LGA had a higher proportion of people with qualifications - vocational, Bachelor or Higher Degree or Advanced Diploma or Diploma– see
Figure 7.

Figure 25 Highest qualification



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

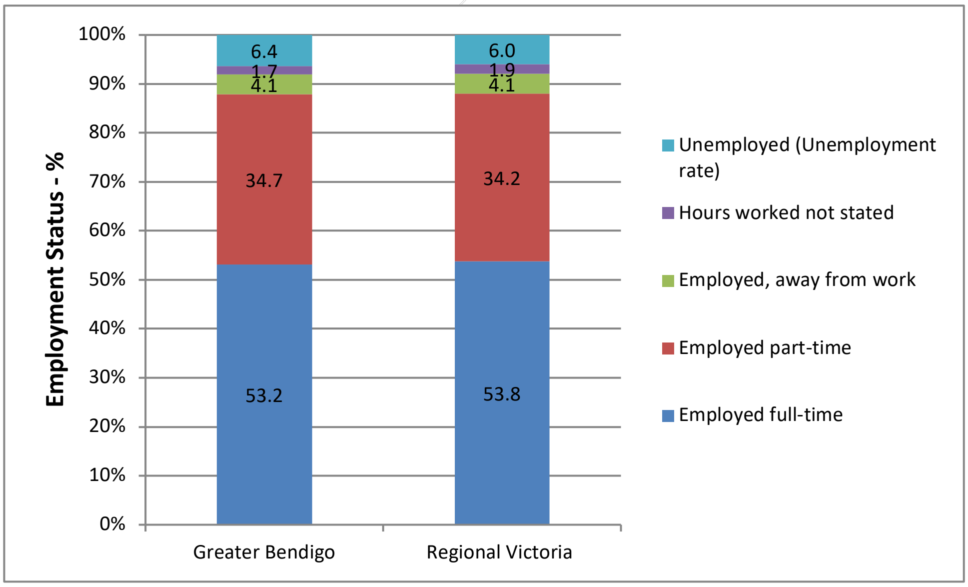
Employment Growth for Usual Residents

In 2016, 48,673 of the usual residents of the Greater Bendigo LGA were employed. The usual resident labour force grew by 10.1% between 2006 and 2011, and 7.8% between 2011 and 2016. At the same time the usual residents employed grew by 11.7% and 6.4% respectively.

Employment Status

In 2016, the Greater Bendigo LGA had a slightly higher proportion of the labour force employed in part-time jobs than regional Victoria and a slightly lower proportion in full-time jobs. Overall it had a slightly higher unemployment rate than regional Victoria.

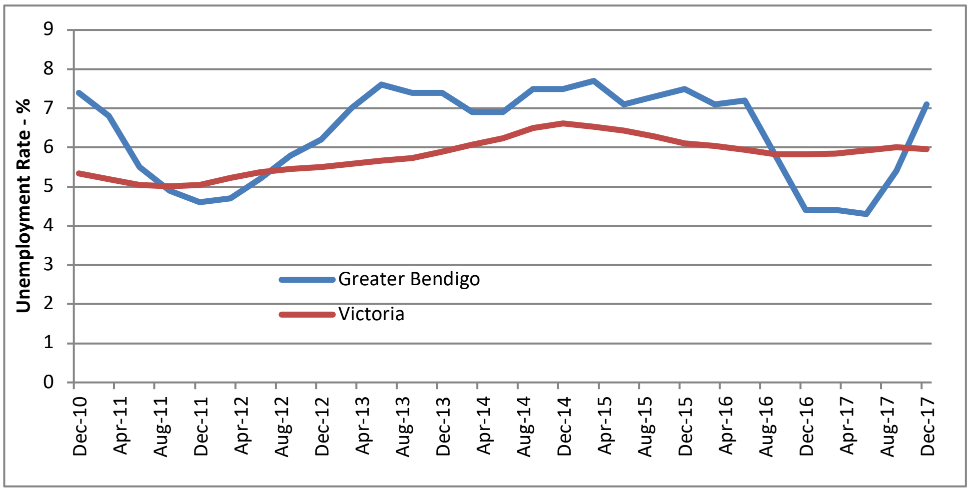
Figure 26 Employment Status



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

The Department of Employment's Small Area Labour Markets publication (see Figure 4) indicates that unemployment in the region has historically been higher than that for Victoria with a few periods of time when it has been below that for Victoria.

Figure 27 Unemployment Rates over Time



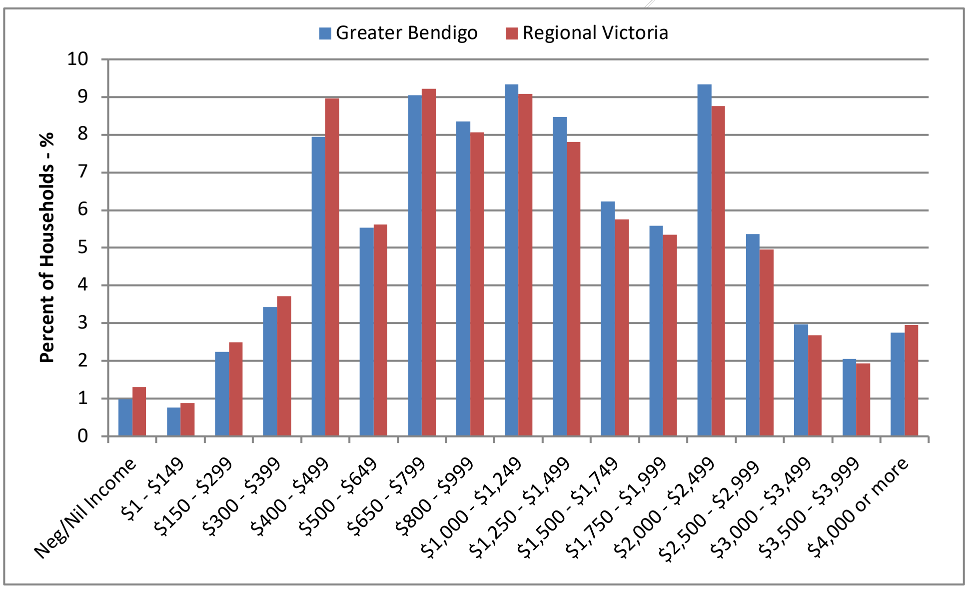
Source: Department of Employment, Small Area Labour Markets (December 2017)

Income

In 2016, the median weekly household income for the region was $1,184 compared to $1,124 for regional Victoria and $1,419 for Victoria.

The distribution of weekly household income relative to Regional Victoria is given in Figure 4. This indicates that the region had a lower proportion of low income households (those earning less than 800 per week) and a higher proportion earning $800 per week or more.

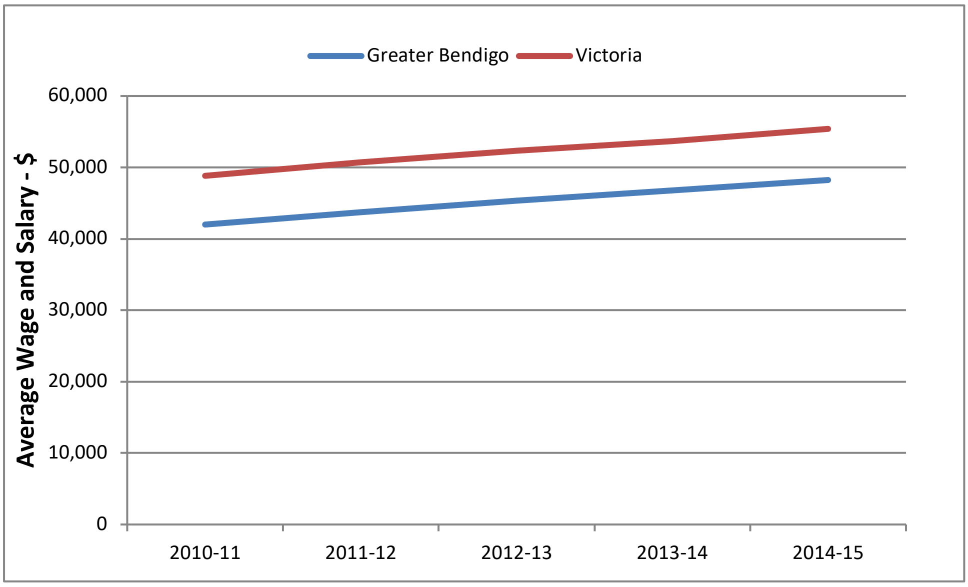
Figure 28 Weekly Household Income Distribution



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Historically, average wage and salary income in the Greater Bendigo LGA has been below that for Victoria– see Figure 4.

Figure 29 Average Wage and Salary Income



Source: ABS, Catalogue Number: 6524.0.55.002 Estimates of Personal Income for Small Areas, 2011-2015

Occupation

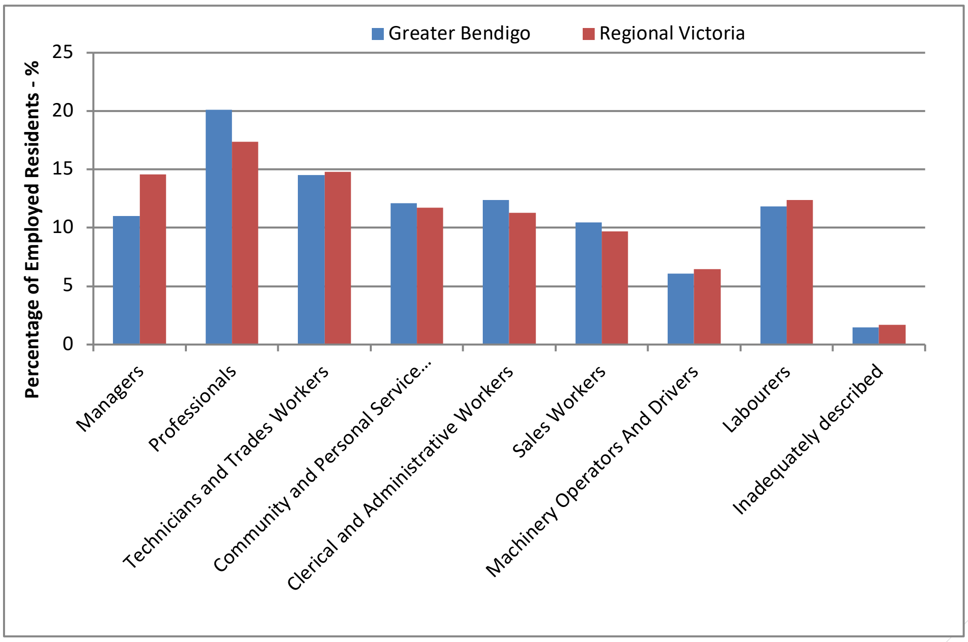
Compared to Regional Victoria, in 2016 the Greater Bendigo LGA had a relatively higher proportion of its resident labour force workers employed as:

- Professionals;
- Community and Personal Service Workers;
- Clerical and Administrative Workers; and
- Sales Workers - see Figure 12.

Comparatively, the region had a lower proportion of its workers employed as:

- Managers;
- Technicians and Trade Workers;
- Machinery Operators and Drivers; and
- Labourers.

Figure 30 Occupations



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Workforce Location

14% of the employed usual residents of the region commute to work outside the region. The main destination is No Fixed Address (Vic) and Mount Alexander Shire.

Table 3 Work Location of Employed Usual Residents of the Greater Bendigo LGA

LGA	%
Greater Bendigo (C)	86%
No Fixed Address (Vic.)	4%
Mount Alexander (S)	3%
Loddon (S)	1%
Melbourne (C)	1%
Campaspe (S)	1%
Macedon Ranges (S)	1%

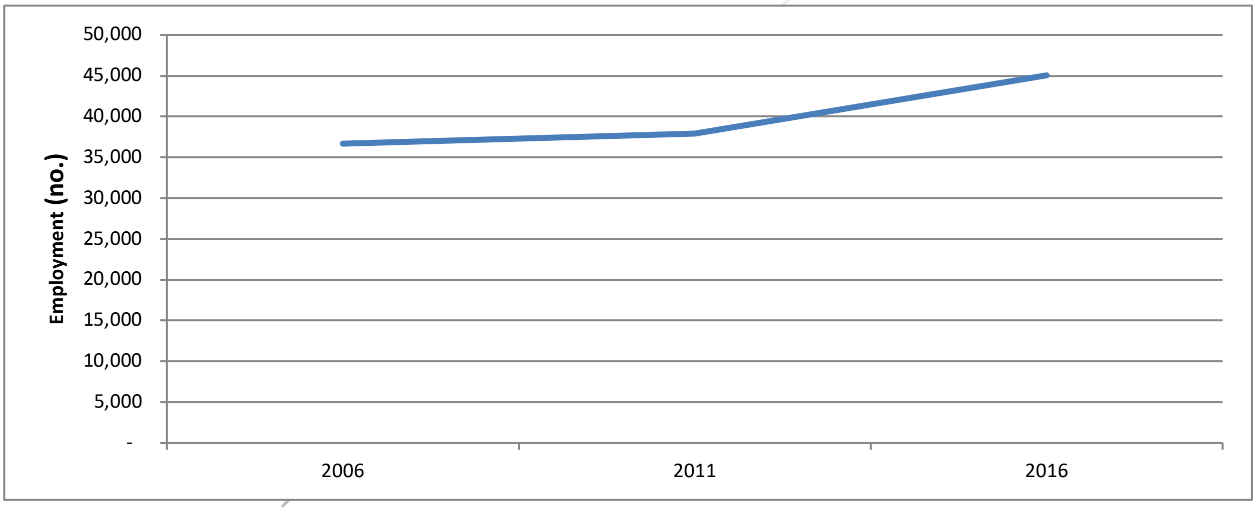
Source: ABS Tablebuilder 2016 Census

3.2. Economic Profile

Employment Growth

In 2016, there were 45,051 jobs located in the Greater Bendigo LGA, less than the labour force residing in the region and less than the employed labour residing in the region. Employment in the Greater Bendigo LGA grew between 2006 and 2011 by 3% and then grew by 19% between 2011 and 2016. As identified, in Figure 12 to Figure 12 this appears to be associated with growth in employment across numerous sectors.

Figure 31 Employment Growth in the Region



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Source of Workers

In 2016, 92% of jobs in the region were filled by those residing in the region. Those who work in the region, but live outside it, are predominantly from Mount Alexander (2%), Lodden (1%), Macedon Ranges (1%) and Campaspe (1%).

Table 4 Residential Location of Workers Employed in the Region

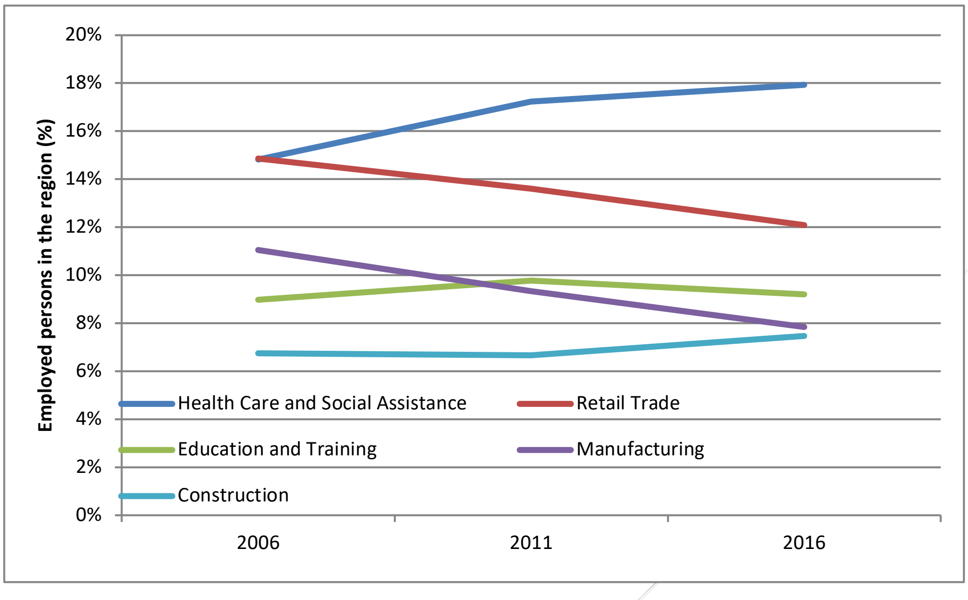
LGA	%
Greater Bendigo (C)	92%
Mount Alexander (S)	2%
Loddon (S)	1%
Macedon Ranges (S)	1%
Campaspe (S)	1%

Source: ABS Tablebuilder 2016 Census

Industry Employment Share

As shown in
Figure 14, historically, by far the largest employing industry in the region has been Health Care and Social Assistance. The relative significance of this sector to employment in the region grew between 2006 and 2016. Retail Trade and Manufacturing have historically the second and third largest employer but the relative significance of these sectors has declined since 2006, although Retail Trade remains the second largest employing sector and Manufacturing is now the fourth largest employing sector. Education and Training and Health Care and Social Assistance are the third and fifth largest employers.

Figure 32 Historical Employment of the five largest ANZSIC Level 1 industries in Greater Bendigo LGA



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Employment by Industry, Growth and Specialisations

Figure 12 to Figure 12 summarise:

- employment by industry sector at each level of the ANZSIC Industry Classification;
- growth in percentage employment from 2011 to 2016; and
- level of industry specialisation;

for sectors that represent more than 1% of employment in the Greater Bendigo LGA.

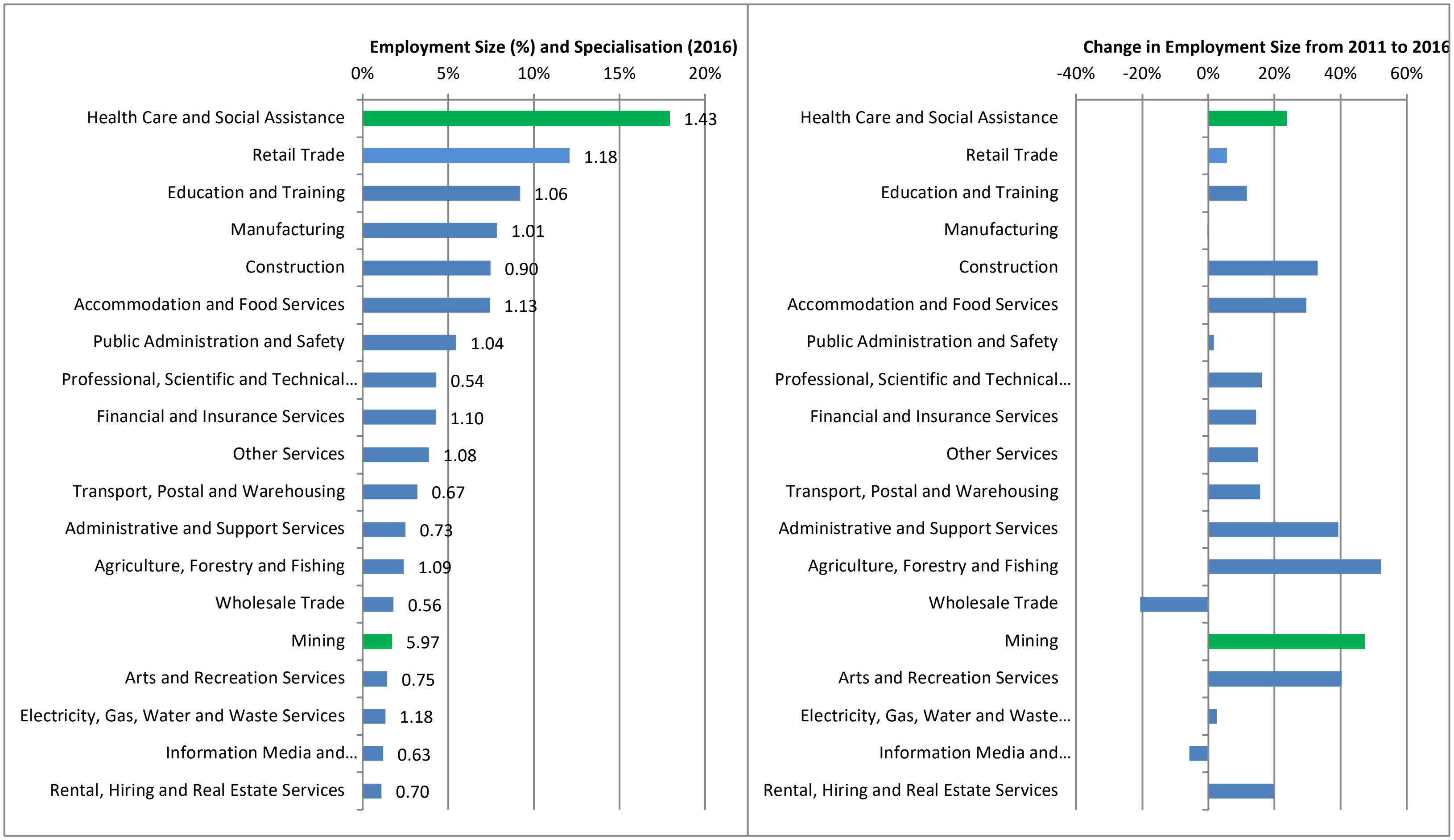
Level of industry specialisation was determined using Location Quotients (LQs) which measure the employment concentration in industry sectors within a regional economy, compared with the same sectors across the State, in this case Victoria. Generally, a LQ greater than 1.25 is taken as initial evidence of regional specialisation and that the industry has potential to be classified as an exporter (i.e. servicing more than just the regional population). The higher the LQ, the more specialised a region is in that industry relative to Victoria.

It is the sufficiently large (greater than 1% of employment) specialisation sectors that that produce goods and services that are traded outside the region (i.e. exported and so are generally non-population serving industries), and have a reliance on local endowments, that are the key 'engines of growth' of regional economies. 'Enabling industries' provide specialised inputs to engine industries e.g. repairs and maintenance, transport etc, while 'population serving' industries generally service the retail and personal services needs of the population. 'Engines of growth' can also include population serving industries where they are servicing more than just the local population e.g. Hospital Sector, Accommodation and Food Service where it is partly catering to tourists.

Based on Figure 12 to Figure 12 it is evident that the key engines of growth in the Greater Bendigo LGA economy are:

- Health Care and Social Assistance - predominantly Hospitals, Medical and Other Health Care Services and Social Assistance;
- Mining - predominantly gold ore mining;
- Food Product Manufacturing - predominantly Poultry Processing; and
- Finance - predominantly Banking.

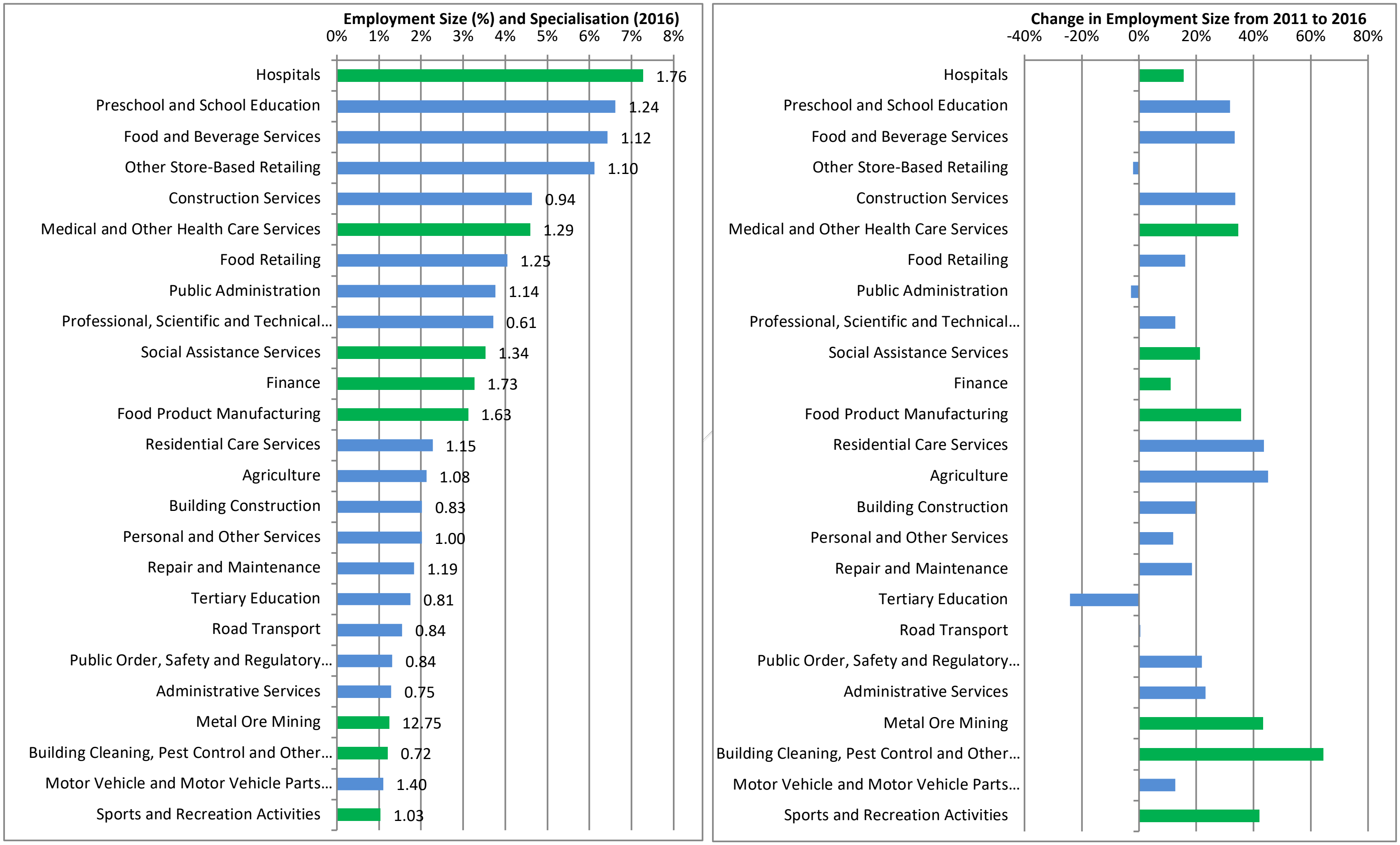
Figure 33 ABS 1 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

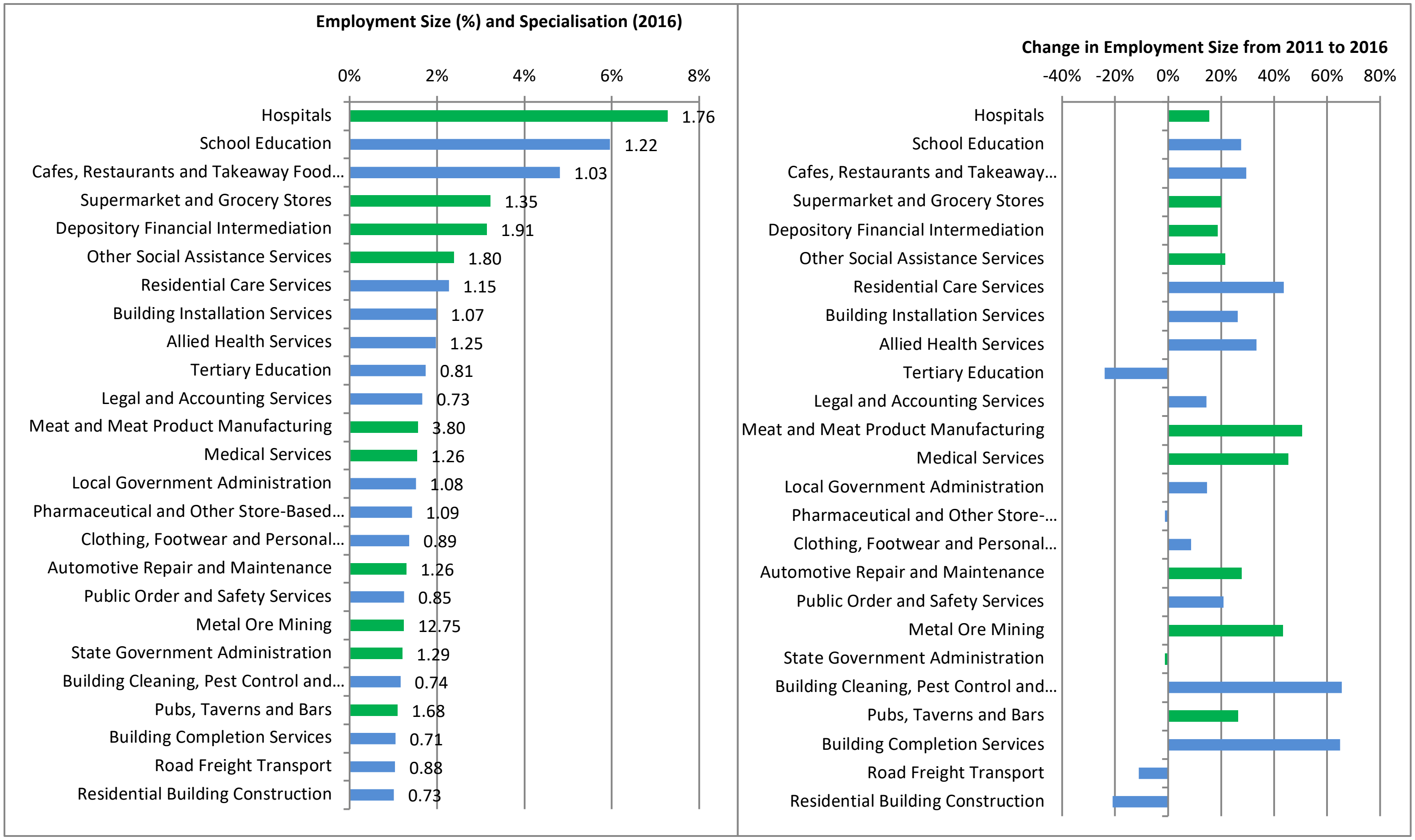
Figure 34 ABS 2 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

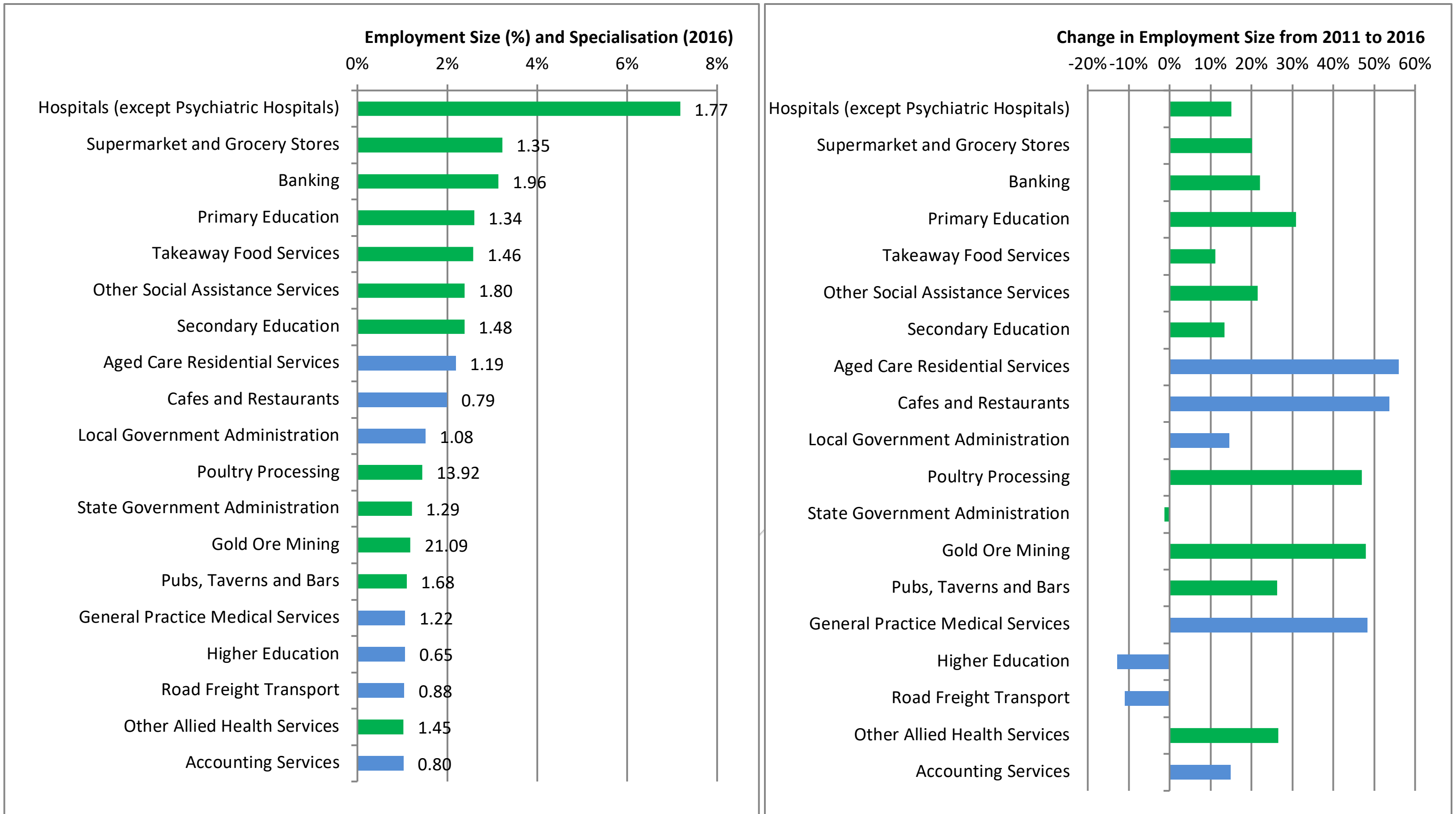
Figure 35 ABS 3 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

Figure 36 ABS 4 Digit Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

4. Hepburn, Moorabool and Macedon Ranges LGAs

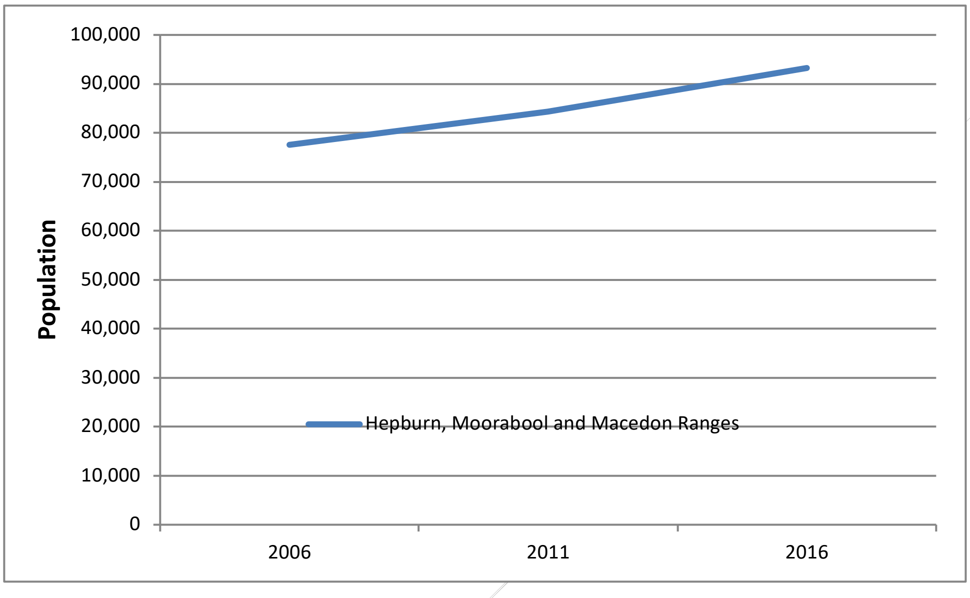
4.1. Demographic Profile of Residents

Population

Population Levels and Historic Growth

In 2016 the population of Hepburn, Moorabool and Macedon Ranges LGAs was 93,248. The population grew by 8.7% between 2006 and 2011 and 10.5% between 2011 and 2016 (refer to Figure 1). This was similar to the population growth rates for Victoria (8.5% between 2006 and 2011 and 10.7% between 2011 and 2016) .

Figure 37 Historical Population of the Region

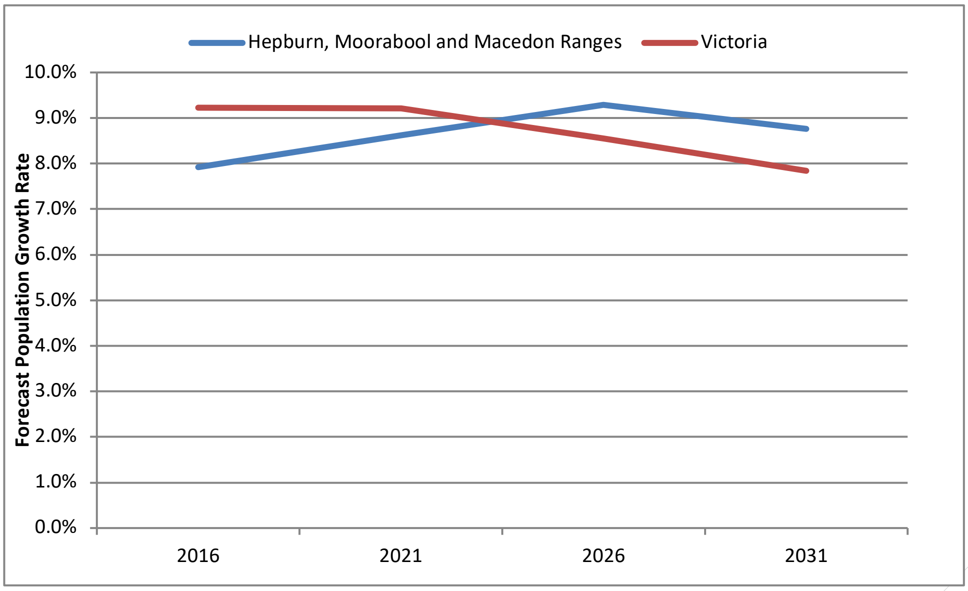


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Population Growth Projections

The region is forecast to have population growth rates greater than that for Victoria after 2021 i.e. 8.8% to 9.3% per intercensal period compared to 7.8% to 8.6% for Victoria - see Figure 4.

Figure 38 Population Growth Rate Forecasts



Source: Victorian Department of Environment, Land and Water Planning (2011) Victoria in Future 2016

Indigenous Population

0.9% of the population are Aboriginal and/or Torres Strait Island people, compared to 1.6% of the regional population of Victoria and 0.8% of the population Victoria.

Ethnicity and Language

79.4% of the population were born in Australia, with the next most common countries of birth being England (4.1%) and New Zealand (1.3%).

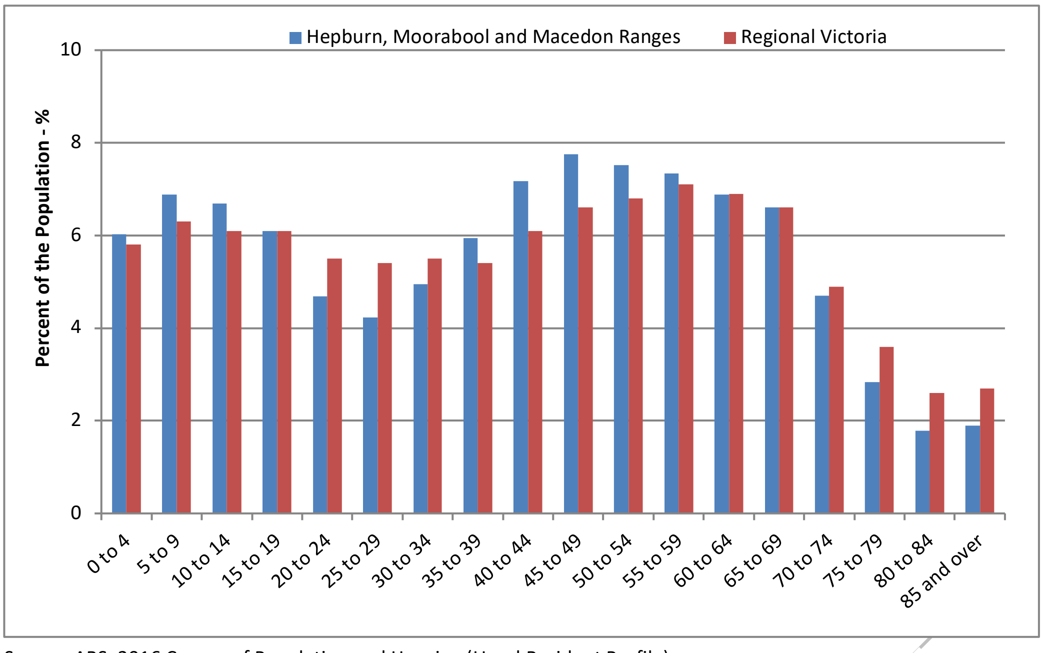
7.1% of households spoke a language other than English at home, with the main languages being Italian, German, Greek and Mandarin.

Age Profile

In 2016, the weighted average median age of the Hepburn, Moorabool and Macedon Ranges LGAs was 43, the same as the median age for regional Victoria (43) and higher than the median age for Victoria (37).

Regional Victoria has a higher percentage of the population in the 5 to 19 age bracket and the 50+ age brackets. The 'hollowing-out' of the work force age groups might reflect the out-movement of these workers and also of young adults to Melbourne for work and post-school education, a common phenomenon across regional Australia. Compared to regional Victoria (Figure 4), the Hepburn, Moorabool and Macedon Ranges LGAs has a higher proportion of people in 0 to 14 years age groups, 35 to 59 age groups and a lower proportion in the of people in the 20 to 34 age groups and 70+ age groups.

Figure 39 Hepburn, Moorabool and Macedon Ranges LGAs Population Age Distribution vs Regional Victoria

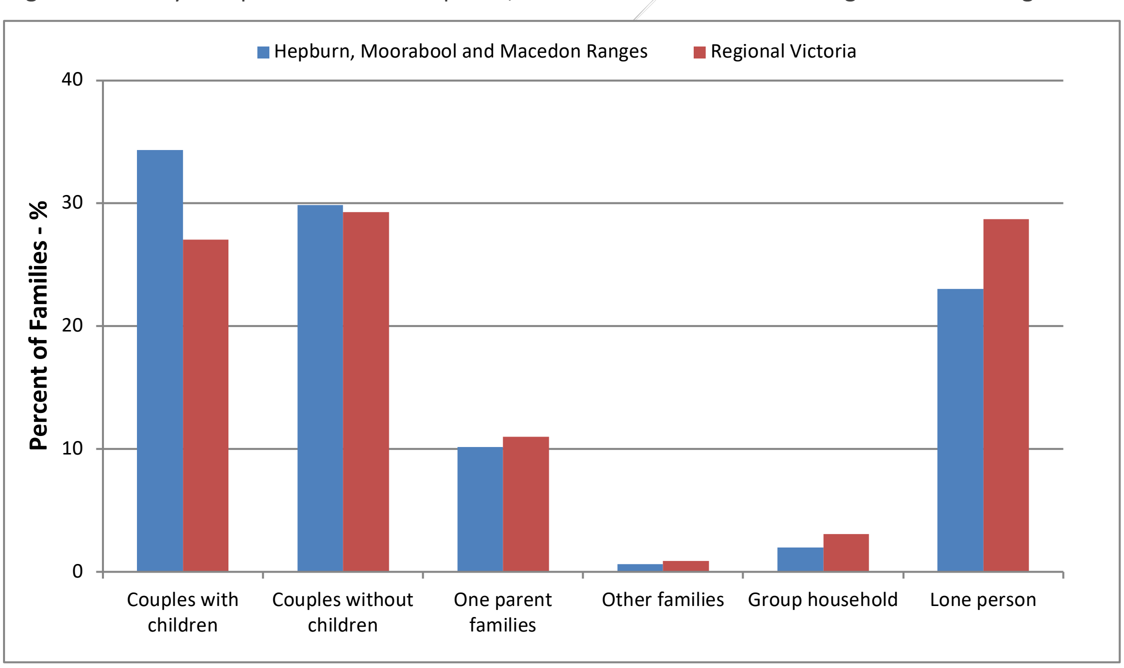


Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Family composition

Compared with Regional Victoria, the Hepburn, Moorabool and Macedon Ranges LGAs have a higher proportion of couple families with and without children. Refer to Figure 4.

Figure 40 Family Composition for the Hepburn, Moorabool and Macedon Ranges LGAs and Regional Victoria



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Housing

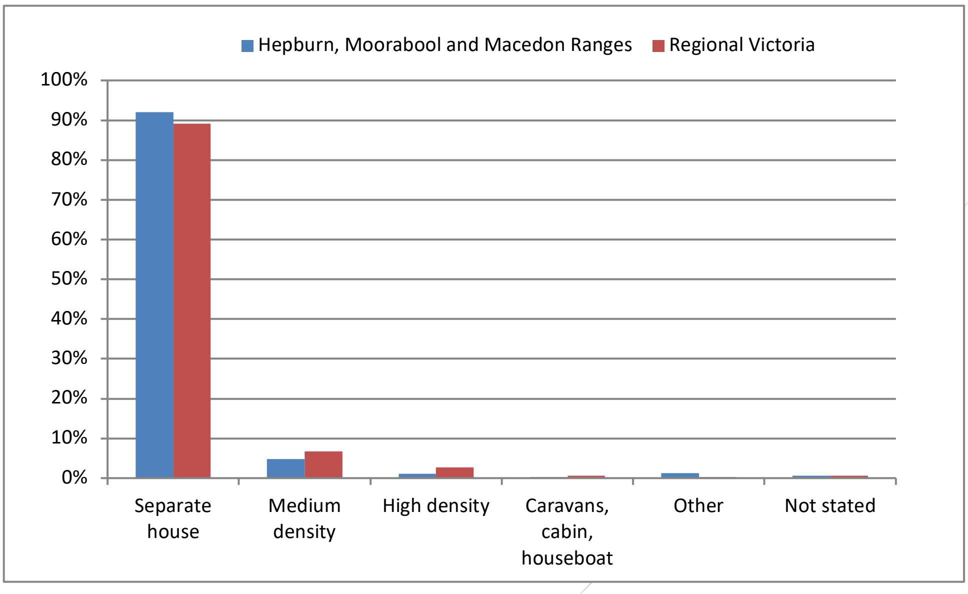
Private Dwellings and Occupancy

In the Hepburn, Moorabool and Macedon Ranges LGAs there were 38,046 private dwellings in 2016 with 86.5% of these occupied, more than the proportion occupied across regional Victoria (82.9%).

Dwelling Types

The Hepburn, Moorabool and Macedon Ranges LGAs have a higher proportion of occupied separate houses than regional Victoria.

Figure 41 Occupied Dwelling Types



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Rent

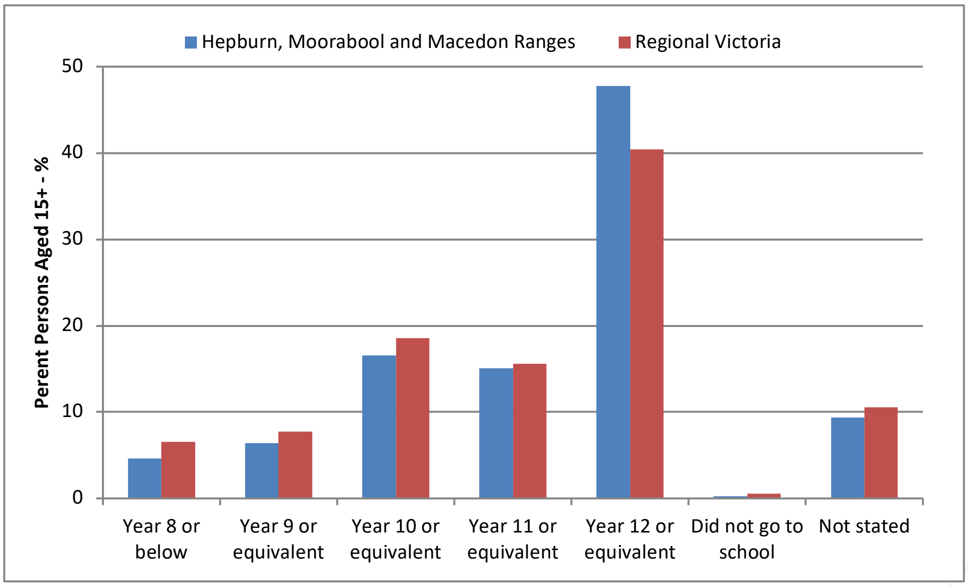
The weighted average median rent between the three LGAs $279 per week, higher than the median weekly rent for regional Victoria ($231) and lower than that for Victoria ($325).

Education & Employment

Education

Compared with Regional Victoria, the Hepburn, Moorabool and Macedon Ranges LGAs had a higher proportion of people who completed Year 12 or equivalent —see
Figure 6.

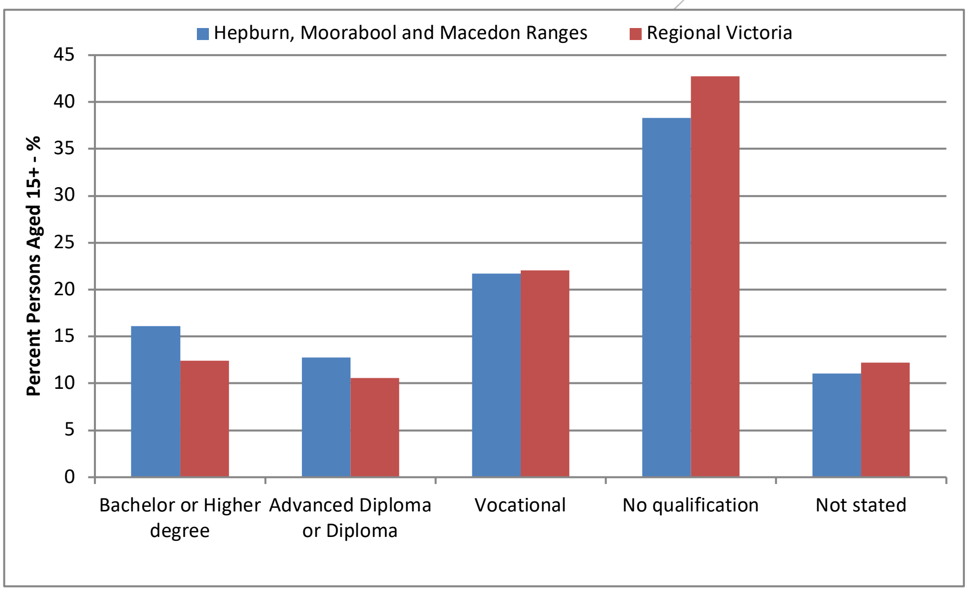
Figure 42 Highest level of schooling



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Compared to Regional Victoria, in 2016 the Hepburn, Moorabool and Macedon Ranges LGAs had a higher proportion of people with Bachelor or Higher degree or Advanced Diploma or Diploma qualifications - see
Figure 7.

Figure 43 Highest qualification



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Employment Growth for Usual Residents

In 2016, 42,712 of the usual residents of the Hepburn, Moorabool and Macedon Ranges LGAs were employed. The usual resident labour force grew by 12.1% between 2006 and 2011, and 7.1% between 2011 and 2016. At the same time the usual residents employed grew by 12.6% and 6.3% respectively.

Employment Status

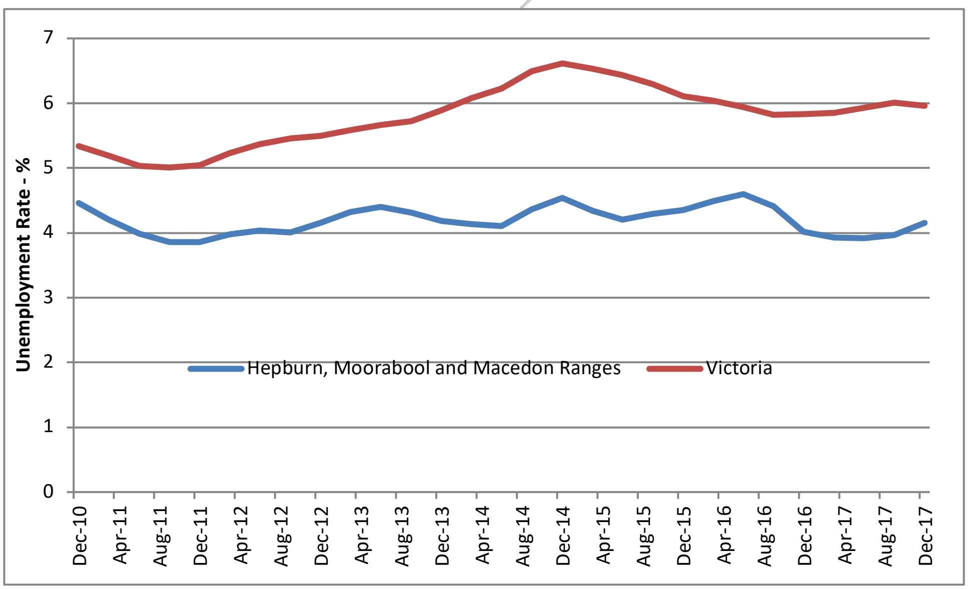
In 2016, the Hepburn, Moorabool and Macedon Ranges LGAs had a higher proportion of the labour force employed in full-time than regional Victoria and a slightly lower proportion in part-time jobs. Overall it had a lower unemployment rate than regional Victoria.

Figure 44 Employment Status

Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

The Department of Employment's Small Area Labour Markets publication (see Figure 4) indicates that unemployment in the region has historically been lower than that for Victoria.

Figure 45 Unemployment Rates over Time



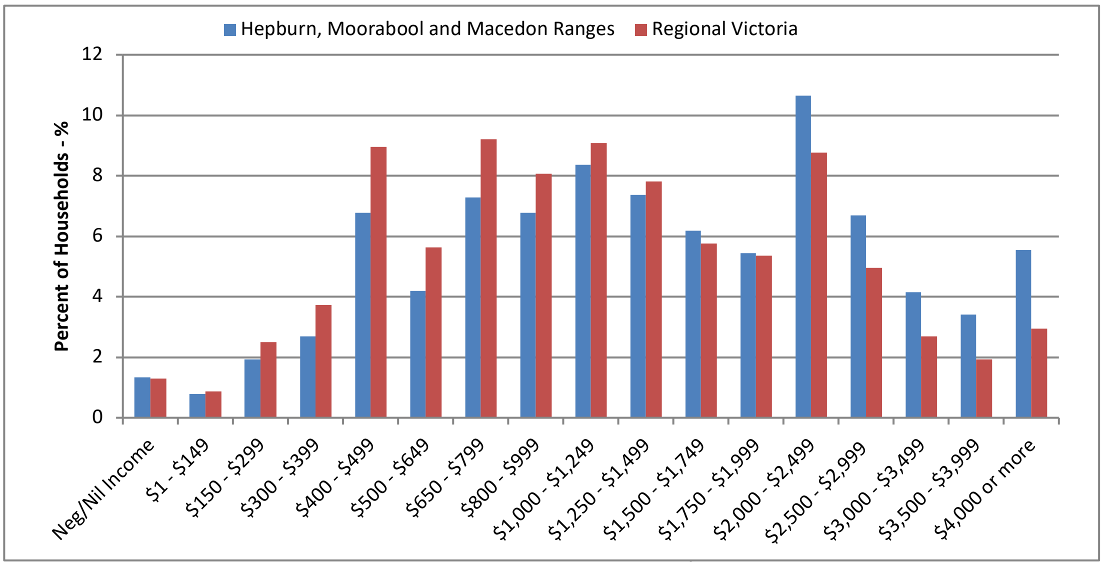
Source: Department of Employment, Small Area Labour Markets (December 2017)

Income

In 2016, the weighted average median weekly household income for the three LGAs was $1,441 compared to $1,124 for regional Victoria and $1,419 for Victoria.

The distribution of weekly household income relative to Regional Victoria is given in Figure 4. This indicates that the Hepburn, Moorabool and Macedon Ranges LGAs had a lower proportion of low income households (those earning less than $1,500 per week) and a higher proportion earning $1,500 per week or more.

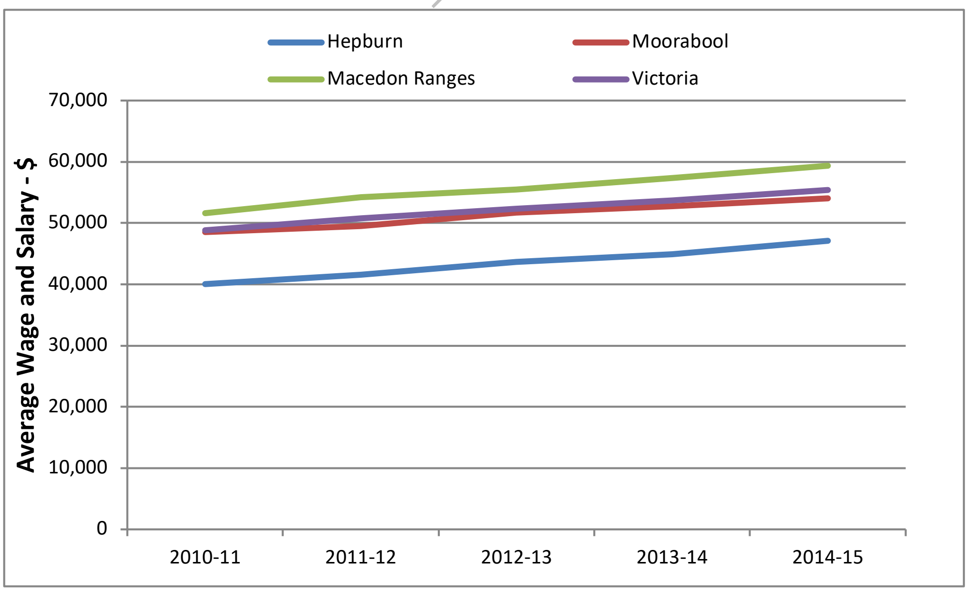
Figure 46 Weekly Household Income Distribution



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Historically, average wage and salary income in the Hepburn, Moorabool and Macedon Ranges LGAs has varied between LGAs, with mean wage and salary for Macedon Ranges LGA being higher than that for Victoria while the mean wage and salary for Hepburn LGA and Moorabool LGA has been below that for Victoria – see Figure 4.

Figure 47 Average Wage and Salary Income



Source: ABS, Catalogue Number: 6524.0.55.002 Estimates of Personal Income for Small Areas, 2011-

Occupation

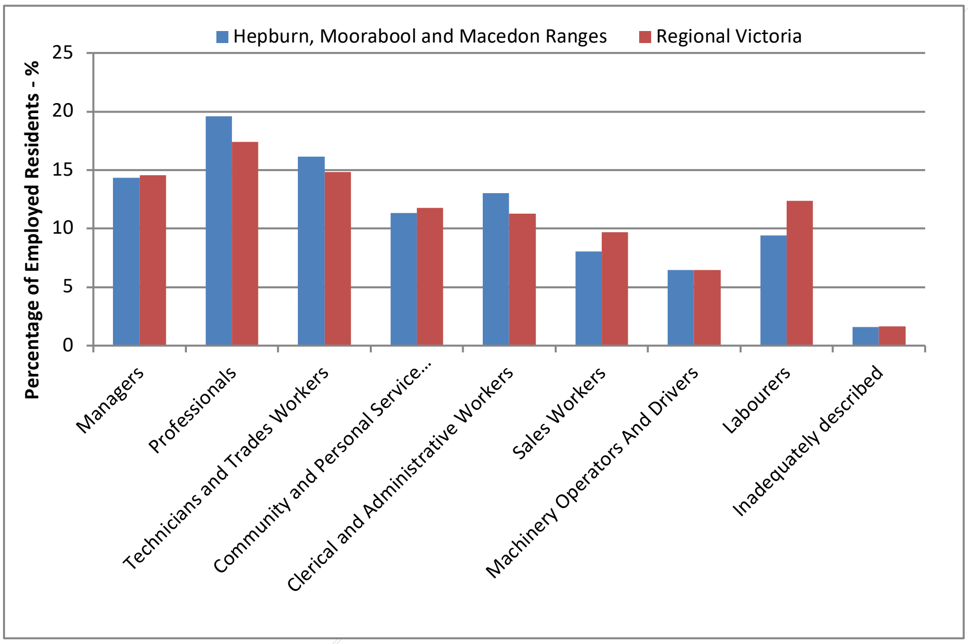
Compared to Regional Victoria, in 2016 the Hepburn, Moorabool and Macedon Ranges LGAs had a relatively higher proportion of its resident labour force workers employed as:

- Professionals;
- Technicians and Trade Workers; and
- Clerical and Administrative Workers - see Figure 12.

Comparatively, the region had a lower proportion of its workers employed as:

- Managers;
- Community and Personal Service Workers;
- Sales Workers; and
- Labourers.

Figure 48 Occupations



Source: ABS, 2016 Census of Population and Housing (Usual Resident Profile)

Workforce Location

57% of the employed usual residents of the region commute to work outside the region. The main destinations are Melbourne (10%), Hume (7%), Ballarat (7%) and No Fixed Address (Vic).

Table 5 Work Location of Employed Usual Residents of the Hepburn, Moorabool and Macedon Ranges LGAs

LGA	%
Hepburn, Moorabool and Macedon Ranges	43%
Melbourne (C)	10%
Hume (C)	7%
Ballarat (C)	7%
No Fixed Address (Vic.)	6%
Brimbank (C)	4%
Melton (C)	4%
Wyndham (C)	3%

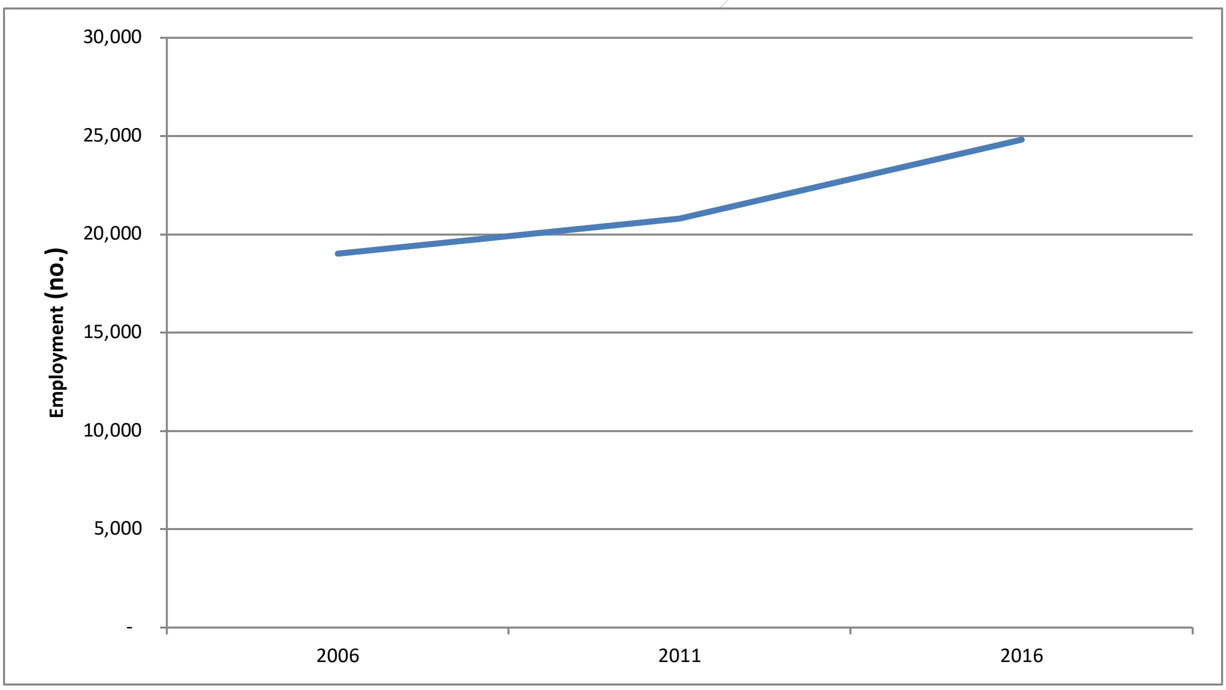
Source: ABS Tablebuilder 2016 Census

4.2. Economic Profile

Employment Growth

In 2016, there were 24,818 jobs located in the Hepburn, Moorabool and Macedon Ranges LGAs, less than the labour force residing in the region and less than the employed labour residing in the region. Employment in the Hepburn, Moorabool and Macedon Ranges LGAs grew between 2006 and 2011 by 9% and then grew by 19% between 2011 and 2016. As identified, in Figure 12 to Figure 12 this appears to be associated with growth in employment across numerous sectors.

Figure 49 Employment Growth in the Region



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Source of Workers

In 2016, 73% of jobs in the region were filled by those residing in the region. Those who work in the region, but live outside it, are predominantly from Melton (5%), Ballarat (5%), Hume (4%) and Mount Alexander (2%).

Table 6 Residential Location of Workers Employed in the Region

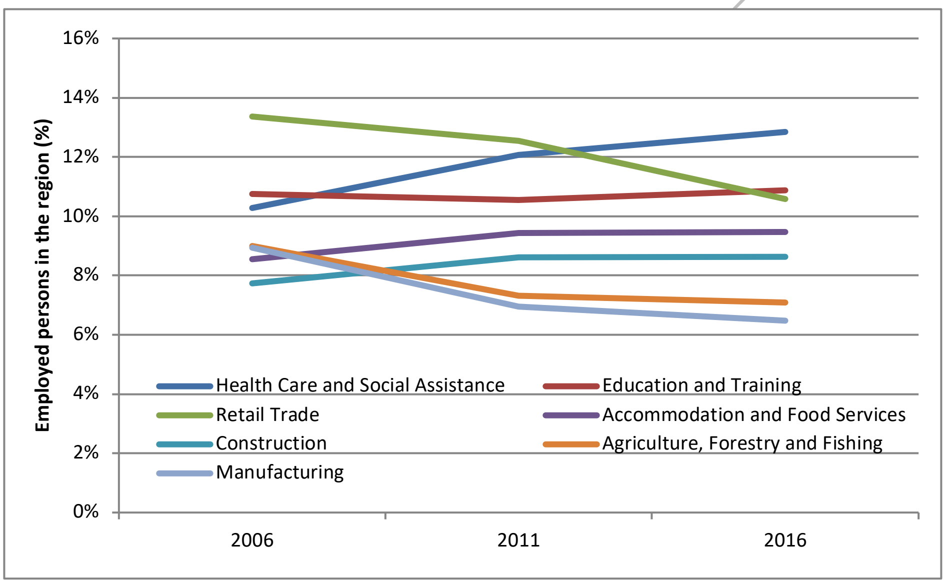
LGA	%
Hepburn, Moorabool and Macedon Ranges	73%
Melton (C)	5%
Ballarat (C)	5%
Hume (C)	4%
Mount Alexander (S)	2%
Brimbank (C)	2%
Greater Bendigo (C)	1%

Source: ABS Tablebuilder 2016 Census

Industry Employment Share

As shown in
Figure 14, historically, by far the largest employing industry in the region has been Retail Trade and Education and Training. The relative significance of Retail Trade to employment in the region declined between 2006 and 2016, as did the relative significance of Agriculture, Forestry and Fishing and Manufacturing. The relative significance to employment in the region of Health Care and Social Assistance grew substantially between 2006 and 2016 to become the most significant employment sector in the region. In 2016, Accommodation and Foods Services and Construction were the third and fourth most significant employment sectors in the region.

Figure 50 Historical Employment of the five largest ANZSIC Level 1 industries in Hepburn, Moorabool and Macedon Ranges LGAs



Source: ABS, 2006, 2011 2016 Census of Population and Housing (Place of Work Profile)

Employment by Industry, Growth and Specialisations

Figure 12 to Figure 12 summarise:

- employment by industry sector at each level of the ANZSIC Industry Classification;
- growth in percentage employment from 2011 to 2016; and
- level of industry specialisation;

for sectors that represent more than 1% of employment in the Hepburn, Moorabool and Macedon Ranges LGAs.

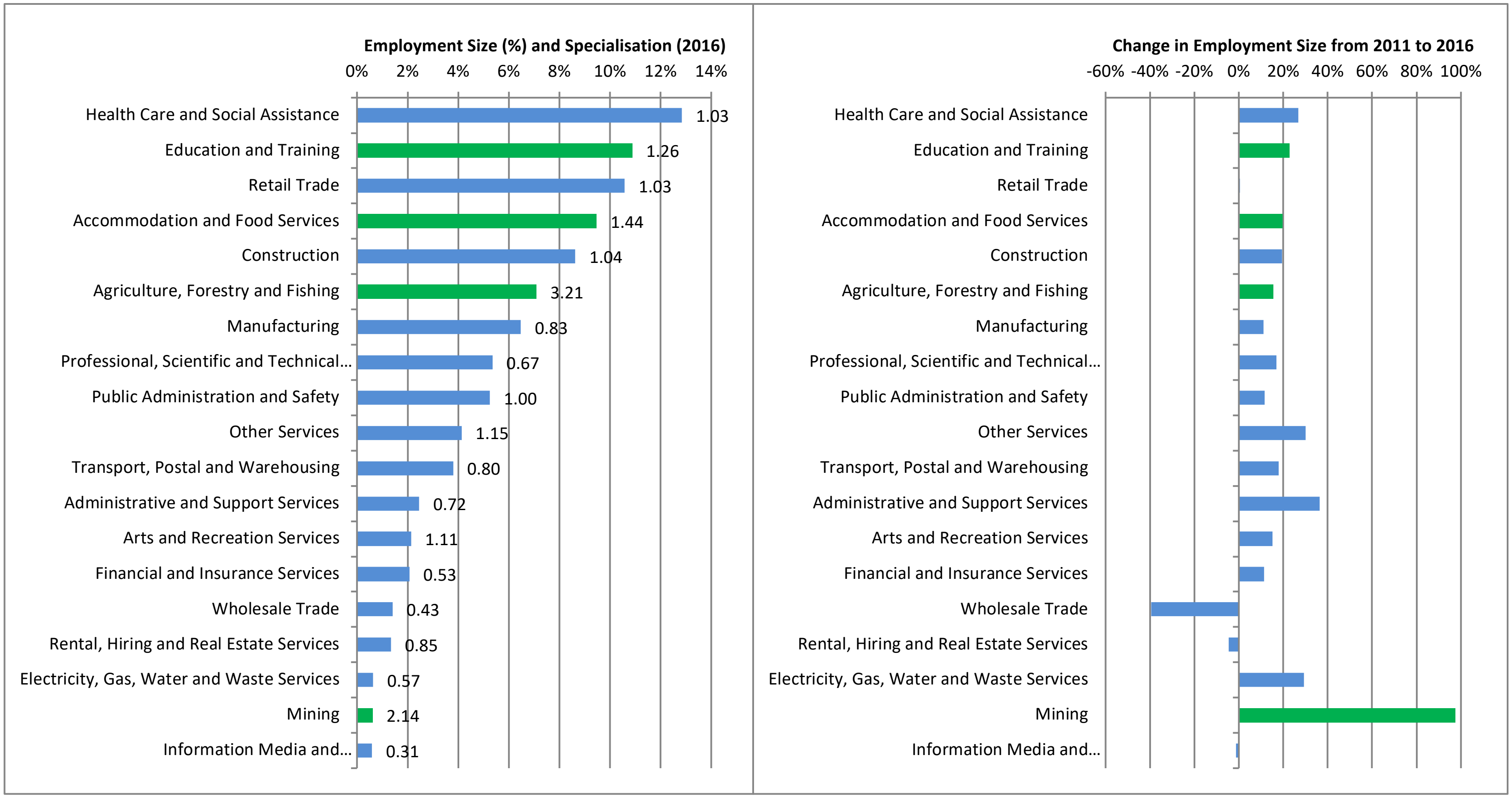
Level of industry specialisation was determined using Location Quotients (LQs) which measure the employment concentration in industry sectors within a regional economy, compared with the same sectors across the State, in this case Victoria. Generally, a LQ greater than 1.25 is taken as initial evidence of regional specialisation and that the industry has potential to be classified as an exporter (i.e. servicing more than just the regional population). The higher the LQ, the more specialised a region is in that industry relative to Victoria.

It is the sufficiently large (greater than 1% of employment) specialisation sectors that that produce goods and services that are traded outside the region (i.e. exported and so are generally non-population serving industries), and have a reliance on local endowments, that are the key 'engines of growth' of regional economies. 'Enabling industries' provide specialised inputs to engine industries e.g. repairs and maintenance, transport etc, while 'population serving' industries generally service the retail and personal services needs of the population. 'Engines of growth' can also include population serving industries where they are servicing more than just the local population e.g. Hospital Sector, Accommodation and Food Service where it is partly catering to tourists.

Based on Figure 12 to Figure 12 it is evident that the key engines of growth in the Hepburn, Moorabool and Macedon Ranges LGAs economy are:

- Accommodation and Food Services - indicative of tourism;
- Agriculture - predominantly Beef Cattle (Specialised) Sheep Farming (Specialised) and Mushroom and Vegetable Growing;
- Aged Care Residential Services;
- Meat and Meat Product Manufacturing; and
- Mining - predominantly Construction Material Mining.

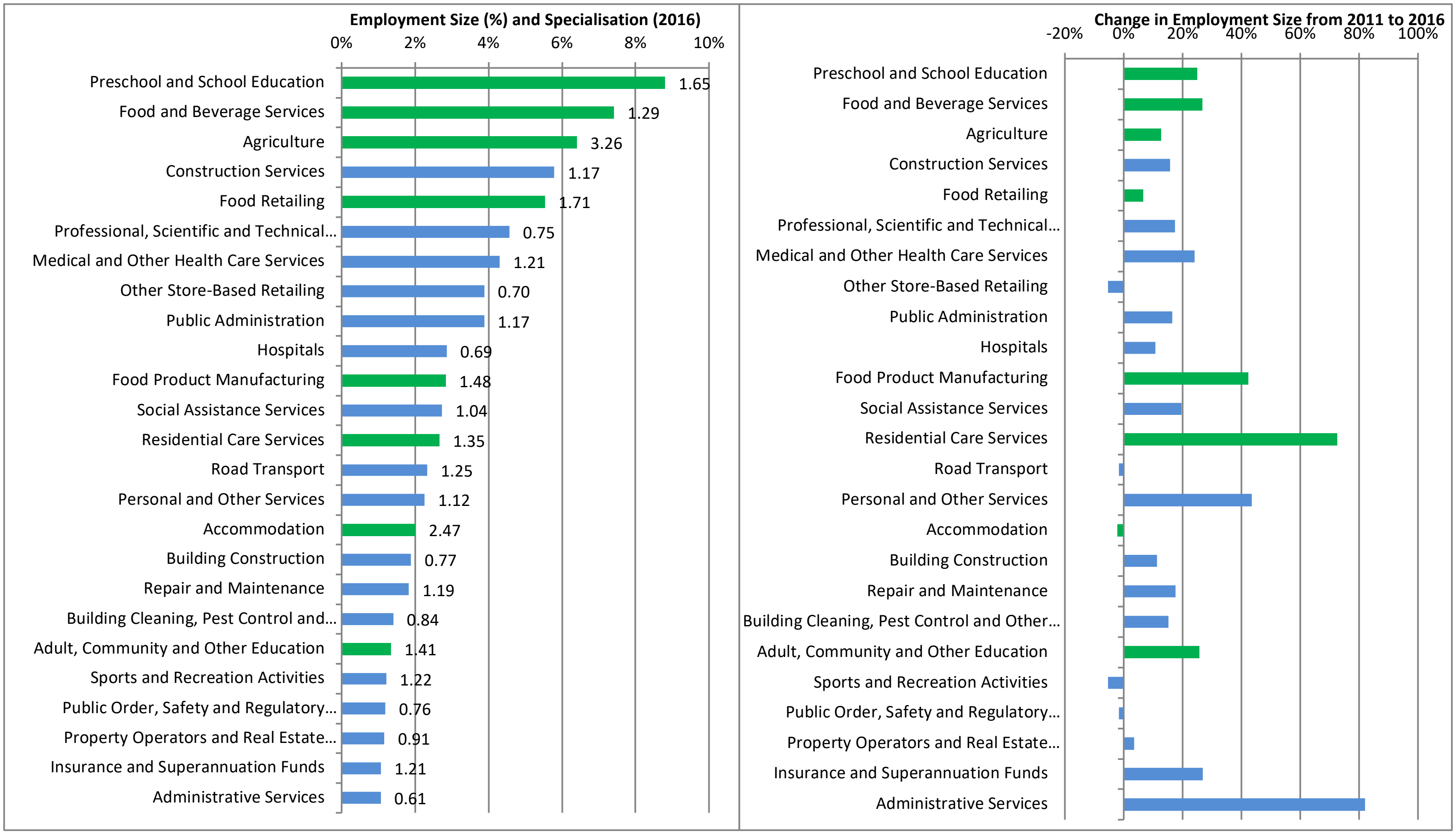
Figure 51 ABS 1 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

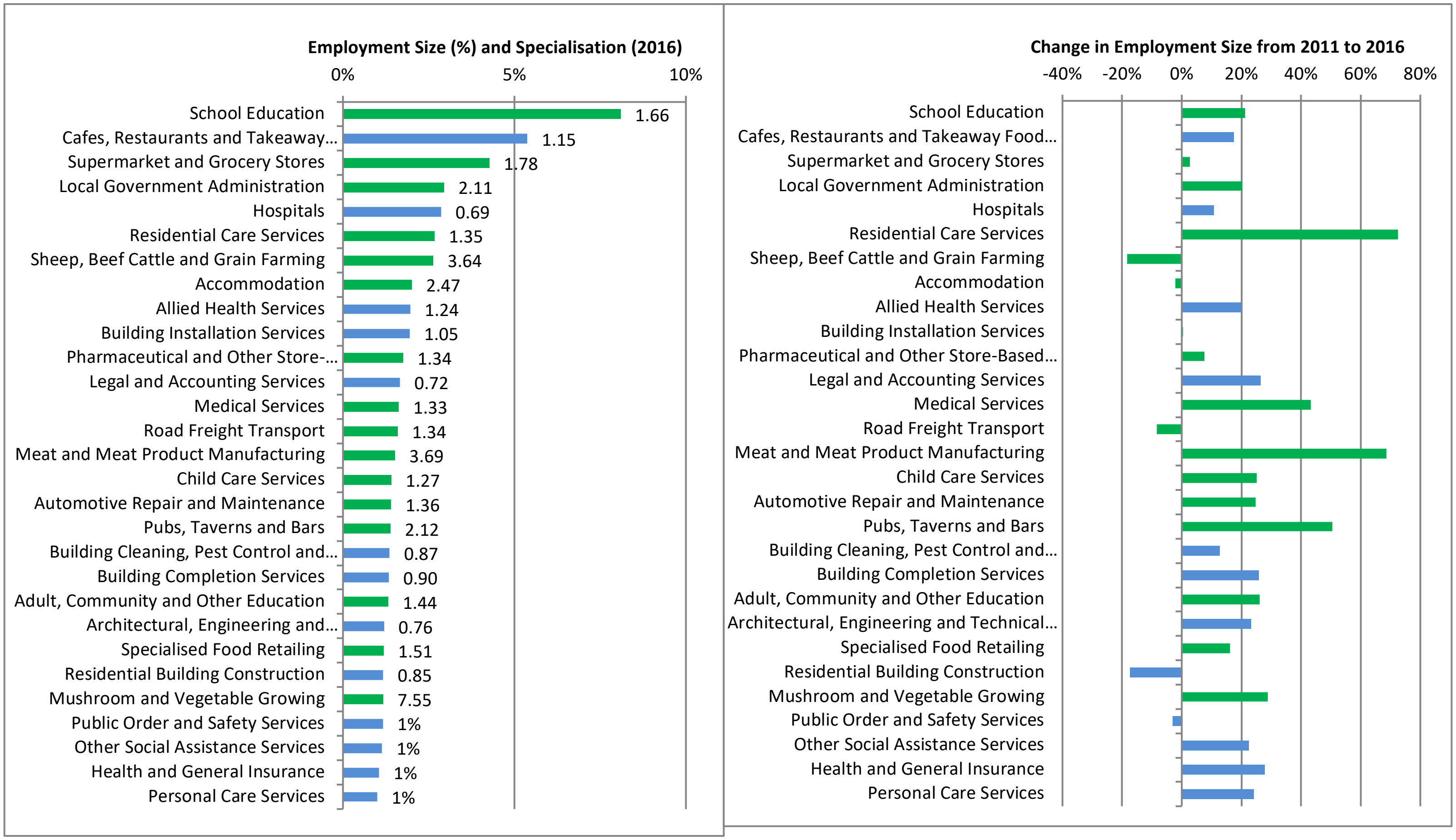
Figure 52 ABS 2 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

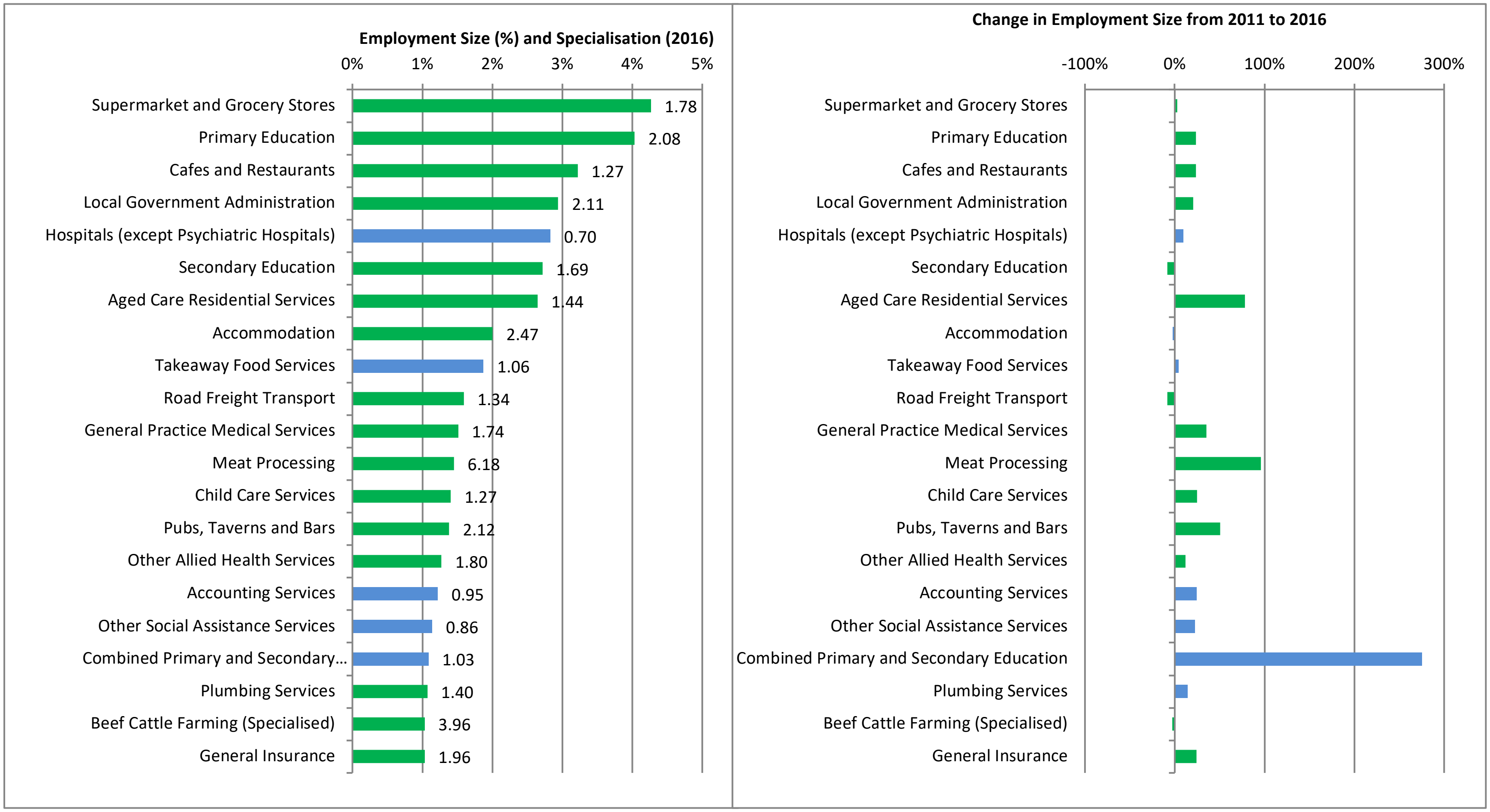
Figure 53 ABS 3 Digit ANZSIC Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

Figure 54 ABS 4 Digit Level Industry Employment Size, Specialisation (LQ) and Change in Employment Size



Source: ABS Tablebuilder 2011, 2016 Census

Note: Green represents a sector with a specialisation. All other sectors are in blue. The LQ for each sector is provided at the end of each bar.

5. Regional Comparison

A comparison between regions of the main socioeconomic statistics is provided in Table 7.

Table 7 Comparison of Socioeconomic Statistics

STATISTICS	PYRENEES LGA	GREATER BENDIGO	HEPBURN, MOORABOOL AND MACEDON RANGES
DEMOGRAPHIC PROFILE OF USUAL RESIDENTS			
Population			
Population 2016	7,238	110,477	93,248
Population Growth 2011-2016	8.5%	9.8%	10.5%
Population Growth Rate Projections	2.5% to 2.7%	8.7% to 10.2%	8.8% to 9.3%
Indigenous and/or Torres Strait Island Population	1.6%	1.7%	0.9%
% born in Australia	81.5%	84.5%	79.4%
% Speak a language other than English at home	3.6%	5.6%	7.1%
Main non-English Language	Dutch, French, Greek, Spanish, Vietnamese	Karen, Mandarin, Italian, Malayalam, Punjabi	Italian, German, Greek and Mandarin
Median age	50	39	43.00%
Family composition compared to Regional Victoria	More couples without children and lone person households	More couples with children, one parent families and groups households	More Couples with children and couples without children
Dwellings			
No of private dwellings	3,344	46,359	38,046
% private dwellings occupied	81.3%	89.2%	86.5%
% separate houses	98%	90%	92%
Median weekly rent	$160	$250	$279
Education and Employment			
% year 12 or equivalent	31%	43%	48%
% with formal qualifications	17%	25%	29%
No. of residents employed	2,671	48,673	42,712
% growth in employed usual residents 2011 - 2016	2.6%	6.4%	6.3%
% full-time jobs	52.1%	53.2%	55.4%
% part time jobs	34.5%	34.7%	33.8%
Unemployment rate	6.2%	6.4%	5.0%
Median weekly household income	$876	$1,184	$1,441
Average wage and salary 2014-15	41,727	$48,238	$47,107 to $59,359
Main occupations compared to Regional Victoria	More Managers and Labourers	More Professionals, Community and Personal Service Workers, Clerical and Administration Workers and Sales Workers	More Professionals, Technicians and Trade Workers and Clerical and Administrative Workers
% of usual residents employed in the region	52%	86%	43%
Main other location of usual resident employment	Ballarat	No fixed address (Vic.)	Melbourne
ECONOMIC PROFILE OF REGION			
Employment in region	2,003	45,051	24,818
Growth in employment in the region 2011 to 2016	19%	19%	19%
% of jobs in the region filled by usual residents	70%	92%	73%
Main location of workers not living in the region	Ballarat	Mount Alexander	Melton
Largest employing sectors 2016	Agriculture, Forestry and Fishing	Health Care and Social Assistance	Health Care and Social Assistance
Key engines of growth	Agriculture, Forestry and Fishing	Health Care and Social Assistance	Tourism
	Public Order, Safety and Regulatory Services	Gold Ore Mining	Beef and Sheep Farming and Mushroom and Vegetable Growing
	Beverage Manufacturing	Poultry Processing	Aged Care Residential Services
		Banking	Meat and Meat Product Manufacturing
			Construction Material Mining