

MITCHELL SHIRE ECONOMIC DEVELOPMENT STRATEGY

BACKGROUND DISCUSSION PAPER

MITCHELL SHIRE COUNCIL

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CONTENTS

EXECUTIVE SUMMARY	3	5.3. SUMMARY OF KEY RESULTS	38
1. PROJECT BACKGROUND	8	6. COMMUNITY SURVEY	41
1.1. INTRODUCTION	8	6.1. INTRODUCTION	41
1.2. DEFINITIONS	8	6.2. COMMUNITY SURVEY - KEY FINDINGS	41
2. STRATEGIC CONTEXT	10	6.3. SUMMARY OF KEY RESULTS	42
2.1. INTRODUCTION	10	7. ISSUES AND OPPORTUNITIES	45
2.2. STRATEGIC CONTEXT - KEY FINDINGS	10	7.1. INTRODUCTION	45
2.3. STATE AND REGIONAL PLANNING POLICY	10	7.2. ISSUES AND OPPORTUNITIES - KEY FINDINGS	45
2.4. LOCAL PLANNING POLICY	11	7.3. MITCHELL SHIRE WIDE	46
2.5. MACROECONOMIC CONTEXT	14	7.4. SEYMOUR AND SURROUNDS	50
3. ECONOMIC CONTEXT	16	7.5. KILMORE/BROADFORD	58
3.1. INTRODUCTION	16	7.6. WALLAN AND SURROUNDS	63
3.2. ECONOMIC CONTEXT - KEY FINDINGS	16	8. INFRASTRUCTURE PROJECTS	67
3.3. ECONOMIC PROFILE OF MITCHELL SHIRE	19	8.1. INTRODUCTION	67
3.4. KEY INDUSTRY SECTORS	24	8.2. PUBLIC TRANSPORT PROJECTS	67
3.5. ECONOMIC PROFILE – MITCHELL SHIRE SUB REGIONS	27	8.3. ROAD INFRASTRUCTURE AND STREETSCAPE PROJECTS	67
3.6. RESIDENT PROFILE	30	8.4. EDUCATION INFRASTRUCTURE PROJECTS	67
4. BENCHMARKING	32	8.5. ENABLING INFRASTRUCTURE PROJECTS	68
4.1. INTRODUCTION	32	9. MITCHELL SHIRE ECONOMIC DEVELOPMENT FRAMEWORK	69
4.2. BENCHMARKING - KEY FINDINGS	32	9.1. INTRODUCTION	69
4.3. HISTORICAL AND PROJECTED GROWTH	33	9.3. VISION FOR ECONOMIC DEVELOPMENT	69
4.4. EMPLOYMENT BY INDUSTRY	34	APPENDIX A BUSINESS SURVEY RESULTS	72
4.5. ECONOMIC DEVELOPMENT RESOURCES	35	APPENDIX B CONSULTATION SCHEDULE AND SUMMARY	73
4.6. COMPETITIVE ANALYSIS	36		
5. BUSINESS SURVEY	37		
5.1. INTRODUCTION	37		
5.2. BUSINESS SURVEY - KEY FINDINGS	37		

FIGURES

FIGURE 1 MITCHELL SHIRE – SUB REGIONS	8
FIGURE 2 MITCHELL NORTH / MITCHELL SOUTH	9
FIGURE 3 POPULATION, JOBS AND ECONOMIC INFRASTRUCTURE	18
FIGURE 4 ECONOMIC OUTPUT – MITCHELL SHIRE	19
FIGURE 5 EMPLOYMENT BY INDUSTRY – MITCHELL SHIRE	20
FIGURE 6 AVERAGE WEEKLY INCOME PER JOB – MITCHELL SHIRE	20
FIGURE 7 WORK IN MITCHELL - LEVEL OF EDUCATION	21
FIGURE 8 SEIFA INDEX	21
FIGURE 9 WORK IN MITCHELL - PLACE (LGA) OF RESIDENCE	22
FIGURE 10 LIVE IN MITCHELL - PLACE (LGA) OF WORK	23
FIGURE 11 KEY PROPULSIVE INDUSTRIES	24
FIGURE 12 MEDIUM PROPULSIVE INDUSTRIES	25
FIGURE 13 LOW PROPULSIVE INDUSTRIES	25
FIGURE 14 EMPLOYMENT BY INDUSTRY – SUB REGIONS	27
FIGURE 15 BUSINESSES – SUB REGIONS	29
FIGURE 16 POPULATION- SUB-REGIONS	30
FIGURE 17 REGIONAL BENCHMARKING – CONTEXT MAP	33

TABLES

TABLE 1 WORK IN MITCHELL - PLACE (LGA) OF RESIDENCE	22
TABLE 2 LIVE IN MITCHELL - PLACE (LGA) OF WORK	23
TABLE 3 KEY INDUSTRY SECTORS SUMMARY	26
TABLE 4 OCCUPATION – SUB REGIONS	28
TABLE 5 POPULATION – MITCHELL SHIRE	30
TABLE 6 AGE PROFILE	31
TABLE 7 AGE PROJECTIONS	31
TABLE 8 HISTORICAL AND PROJECTED POPULATION GROWTH	33
TABLE 9 EMPLOYMENT BY INDUSTRY	34
TABLE 10 ECONOMIC AND TOURISM DEVELOPMENT RESOURCES	35
TABLE 11 AVERAGE NUMBER OF ECONOMIC DEVELOPMENT STAFF – VICTORIAN LGAS	36
TABLE 12 AVERAGE BUDGET ALLOCATION	36
TABLE 13 SWOT ANALYSIS – MITCHELL SHIRE WIDE	49
TABLE 14 SWOT ANALYSIS – SEYMOUR AND SURROUNDS	57
TABLE 15 KILMORE/BROADFORD SWOT ANALYSIS	62
TABLE 16 WALLAN AND SURROUNDS SWOT ANALYSIS	66

ACRONYMS

•	EDS – Economic Development Strategy
•	MSS – Municipal Strategic Statement
•	DMP – Destination Management Plan
•	GFC – Global Financial Crisis
•	ABS – Australian Bureau of Statistics
•	GRP – Gross Regional Product
•	SEIFA – Social Economic Indexes for Areas
•	LGA – Local Government Area
•	SWOT – Strengths Weaknesses Opportunities Threats
•	MFTA – Moorabbin Flight Training Academy
•	NEIS – New Enterprise Incentive Scheme
•	SRHC – Seymour Railway Heritage Centre

EXECUTIVE SUMMARY

BACKGROUND AND STRATEGIC CONTEXT

The aim of the Economic Development Strategy is to:

- Grow Mitchell's economy, with a focus on job generation and sustainable growth;
- Build on Mitchell's competitive advantages;
- Investigate the sub-regional economy variances in Mitchell Shire; and
- Identify projects that will lead to significant economic benefit for the region.

There is local and state planning and policy support for Mitchell Shire to increase economic development through population and housing growth, development of existing and emerging industries, infrastructure and service provision, business support and tourism.

Mitchell Shire has embarked on a number of Structure Plans for Mitchell's townships and growth areas which will support economic and business development. The Structure Plans to the South of the Shire are planning for a significant amount of growth that is expected in the Shire over the coming decades.

The previous Economic Development Strategy provided objectives to stimulate the local economy. These included housing and infrastructure provision, development of the tourism industry, employment opportunities in existing and emerging industries, business support and facilitation, land availability and liveability.

Strategic approaches to tourism included improving and diversifying the Shire's history/heritage, arts/culture, food and beverage and nature-based tourism offer and experiences as identified in the Goulburn River Valley Tourism Destination Management Plan.

This Economic Development Strategy will build on the themes of previous strategic plans and policy with the aim to identify initiatives that will create the largest economic benefit and are aligned to the needs of the Mitchell Shire community.

Australian macroeconomic trends suggest that Health care, Education, Transport and logistics, Agriculture and food processing are potential growth industries for Australia. Mitchell Shire is well placed for growth in these industries,

however, Council needs to play a key role in facilitating this growth by supporting the existing business base, attracting new businesses, identifying potential land for business growth and providing strategic policy to support opportunities.

ECONOMIC PROFILE

Mitchell Shire has a Gross Regional Product (GRP) of \$1.43 billion and an estimated total economic output of \$2.37 billion. The major contributors of total output are Manufacturing, Construction and Public administration and safety.

In 2011, there were a total of 9,484 jobs in Mitchell Shire. This number fell by 0.24% from 2011 to 2015, with 9,393 jobs in Mitchell Shire in 2015.

Public administration and safety is the highest employing industry within the Shire (15.8%), followed by Healthcare and Social Assistance (12.3%) and Retail Trade (11.7%).

Some of the Key employers in the region include Puckapunyal Army Barracks, Hospitals in Seymour and Kilmore, Primary and Secondary Schools, Supermarkets, Mitchell Shire Council, Ralphs Meats and Nestle.

The agricultural sector provides a comparatively low level of employment given the size of Mitchell Shire. This is due to much of the rural land being dedicated to broad hectare cattle farming and cropping, which have low requirement for labour.

Niche industries that are not adequately included in census definitions are equine and tourism. Anecdotally the equine industry is significant, with two racecourses (Kilmore and Seymour), many thoroughbred trainers and breeders and a strong recreational equine sector. Initial estimates suggest that the equine sector provides more than \$100 million in output in the region, significantly higher than the agriculture sector which is estimated at around \$25 million.

Data from the Goulburn River Valley Tourism Destination Management Plan identifies that the tourism sector for Mitchell Shire attracts 560,000 people, provides a total output to the Shire of around \$97 million and contributes 660 jobs.

RESIDENT PROFILE

In 2015, the estimated population of Mitchell Shire was 39,581. Mitchell Shire has experienced consistent population growth, particularly in Mitchell South. Approximately two thirds of Mitchell Shire's population are located in Mitchell South. Mitchell North experienced a decline in population from 2001 to 2006 and grew by a marginal 0.2% from 2006 to 2011.

The overwhelming majority of population growth has occurred and is projected to occur in Mitchell South. Significant residential growth is occurring in Beveridge and Wallan with growth projected to continue within these areas.

There is an even distribution of population between the three sub regions, with Wallan & Surrounds the most populated (12,029), followed by Kilmore/Broadford (11,948) and Seymour and Surrounds (10,602).

Mitchell South has a high proportion of children aged between 0 and 19 years, as well as a high proportion of residents aged between 35 and 49 years. The age profile suggests that there is a high proportion of families in the Shire.

The age profile in Mitchell North is slightly older compared to Mitchell South. Approximately 22.2% of the population in Mitchell North are over the age of 60, compared to Mitchell South (15.6%).

Historical population data suggests that Mitchell North has experienced below average population growth over the past decade and the existing resident population is ageing. Mitchell South is projected to experience strong population growth from 2015 to 2031. The household structures in Mitchell South are generally families who are seeking affordable housing options.

The resident and employment profile highlights vast differences in the Shire in terms of growth. It will be important for the economic development strategy to address issues at a sub-regional level. For example, the high level of growth in Mitchell South creates issues in terms of the increase in demand for public services and local jobs. whilst in Mitchell North, the key issue is to counteract the ageing population and stagnant growth through resident and business attraction and topping up the workforce.

ISSUES AND OPPORTUNITIES

MITCHELL SHIRE WIDE

Mitchell Shire is well positioned to attract both residential and employment growth, particularly in Mitchell South, which sits within the northern growth corridor.

Mitchell Shire's key existing propulsive industries include Public Administration and Safety (Defence - Puckapunyal Army Base), Manufacturing (Sugar and Confectionary - Nestle), Construction, Transport, postal and warehousing, Agriculture, and Health care and social assistance. There is an opportunity to further capitalise on emerging growth industries in the Shire which include Health Care, Education, Transport and Accommodation and food services.

A key outcome of consultation identified the need for Council to better engage and support the business sector. Initiatives which should be considered include ongoing communication to the Shire's businesses, networking sessions, development of a Mitchell wide advisory group, and training sessions.

In addition to the specific initiatives identified for townships, Mitchell Shire should consider how to increase productivity in the rural areas. This includes looking at how value adding, horticulture, equine and tourism can be supported and developed.

SEYMOUR AND SURROUNDS SUB REGION

The locational attributes of Seymour make it an ideal region to attract transport, postal and warehousing, distribution and food processing businesses. Seymour's situation and proximity to the Hume and Goulburn Valley Freeways, Mangalore Airport, Port of Melbourne and Victoria's Goulburn Valley are some of the characteristics that will assist in attracting these businesses.

Seymour has experienced below state average growth for population and housing from 2001 to 2011. There is a threat that this trend could continue, resulting in stagnant economic growth. The below average growth could be attributed to the low level of resident attraction due to poor perceptions of Seymour as a low socio economic area. There is an opportunity, in conjunction with the Seymour Structure Plan, to focus on attracting new residents to the area and promoting the lifestyle and rural setting of Seymour which makes it an attractive place to live.

There is an opportunity to grow the Education and training sector in Seymour and improve the pathways between secondary school, tertiary education and the workforce.

Improving the education sector in Seymour would present opportunities to attract new residents, particularly younger families to the area. There is a need to change the culture surrounding education in the town and improve the relationship that the youth have with the education system.

There is a major opportunity in Seymour to utilise the township's existing infrastructure, advantageous geographical location and proximity to environmentally significant areas and nature based assets for education purposes. Seymour has the opportunity to capitalise on its environment, geographical location, and existing infrastructure and services for educational purposes.

Seymour and Surrounds has a significant equine presence. The Seymour Racecourse is an important economic asset that attracts thoroughbred trainers from throughout the region. There is an opportunity to expand the equine precinct in Seymour by investing in thoroughbred training and breeding, as well as lifestyle equine residential areas and the recreational equine industry (pony club, equestrian and show jumping). Seymour has the opportunity to become a premier equine area in the north.

Seymour and Surrounds has a number of existing tourism strengths including military history and rail heritage, equine, nature based tourism and tourism events. There is an opportunity to continue to grow the tourism industry by attracting daytrip and overnight trip visitation. This can be achieved through the following:

- Extension of the Great Victorian Rail train – Extend the starting point from Tallarook to Seymour;
- Development of a stand-alone Army Tank Museum to be located at Puckapunyal – Compliments existing military tourism offer in Seymour (Vietnam Veterans Commemorative Walk, Lighthouse Memorial Park);
- Greater utilisation of the Goulburn River;
- Increase the accommodation offer in Seymour – Develop high quality serviced apartments or eco cabins which capitalises on the Goulburn River and rural setting;
- Agri-tourism uses – Farm gate experiences and the development of a regional produce brand;
- Promote Seymour as a stopover destination – Gateway to Melbourne from the north;
- Explore the potential for a conference/events centre; and
- Support existing tourism events including Tastes of the Goulburn, Alternative Farming Expo, Darley Seymour Cup and the provision of new tourism events.

Seymour and Surrounds has the opportunity to grow the industries of Tourism, Agriculture and food processing, Equine, Transport, postal and warehousing, Retail, and Education and training. These industries are well supported by the existing strengths of the region.

KILMORE/BROADFORD SUB REGION

Kilmore and Broadford are attractive places to live for tree change residents who seek to live on larger allotments in a peri-urban, lifestyle village setting.

Kilmore and Broadford are well provided for in terms of Education and Health Care and there is opportunity to expand these sectors in the future. Kilmore includes two regionally renowned secondary schools: Assumption College and the Kilmore International School.

Kilmore is an ideal location for a tertiary institution to have a presence in the region as there are synergies between Kilmore's regional strengths and tertiary curricula offered in Universities in metropolitan Melbourne. Kilmore's competitive educational strengths include agriculture, food processing, sport and recreation and international studies.

Kilmore and Broadford have the opportunity to grow their current retail base to increase the retail catchment and reduce local escape expenditure to larger retail centres such as Epping, Craigieburn and South Morang. There is currently \$20 million worth of retail development occurring in Kilmore. A state-of-the-art Toyota tyre and service centre, Country Target and McDonalds are currently under construction along Sydney Street in Kilmore and will provide local employment opportunities.

The Broadford State Motorcycle Complex is a significant economic asset in Mitchell Shire as it attracts visitors from across Victoria and interstate for training and events. Broadford has the opportunity to leverage off the operations at the complex by improving marketing and wayfinding as well as providing products that meet the needs of the visitor market including motorbike parts and repairs, clothing, apparel and accessories, as well as casual food and beverage.

There are a high proportion of home based small businesses in the Kilmore/Broadford region that are in need of resources that help support their operations. A business incubator or hub to be located in Kilmore presents an opportunity for further investigation.

The incubator/ business hub would provide small businesses in the region with a facility to conduct business. The business hub could include rentable office space, meeting rooms and 'hot desking'.

As the population grows in Mitchell South, the demand for Health care and social assistance services will increase. The Kilmore and District Hospital is a large employer in the region and will present opportunities for growth in the future.

There is a need for disability and aged care services in the region. These services are underrepresented in the region and will provide local employment opportunities.

The Kilmore/Broadford sub region has the opportunity to grow a number of industries including Retail trade, Professional, scientific and technical services, Financial and insurance services, Agriculture and food processing, Equine, Health care and social assistance and Education and training.

WALLAN AND SURROUNDS SUB REGION

Wallan and Surrounds is experiencing significant population and housing growth following the sub region's partial inclusion within the Urban Growth Boundary. Wallan and Surrounds is expected to experience a level of organic employment and industry growth, however there are a number of opportunities to be harnessed in the future. The development of Wallan in respect of residential, industrial and commercial land will be dependent on the outcomes of the Precinct Structure Plan (PSP), which is currently being prepared by the Metropolitan Planning Authority (MPA).

Wallan is an appealing location for families and businesses looking for affordable living and working options due to the land availability in the sub-region. Residential housing supply is expected to increase as the population growth increases demand for residential properties.

Wallan and Surrounds has a number of competitive strengths that can be further leveraged off including proximity to transport infrastructure, land availability and affordability and sport and recreation attributes.

Wallan is easily accessible via the Hume Freeway and is in close proximity to Melbourne Airport and the Port of Melbourne. Similarly, to Kilmore/Broadford, there is an opportunity to explore the feasibility of a purpose built business incubator/hub in Wallan. The high proportion of home based small businesses in the sub-region require both permanent and temporary office space.

It is undeniable that there will be a proportion of resident in Mitchell South, Wallan and Surrounds in particular, that will be working in the surrounding municipalities of Hume and Whittlesea. The Wallan and Surrounds region needs to understand how they can benefit economically from the increase economic activity occurring in these areas. There is an opportunity for Wallan and Surrounds to attract residents who are seeking employment opportunities in the local and broader northern metropolitan area.

Specific industries that should be targeted for growth in Wallan and Surrounds include Construction, Transport and logistics, Warehousing and distribution, Professional, scientific and technical services and Financial and insurance services.

A high proportion of industry growth will occur organically as the population increases. Demand for public infrastructure and services will increase such as education services (primary, secondary schools), health care and social assistance (Hospitals, medical centres, aged and disability care) and retail (food, liquor, groceries, clothing/apparel, homewares).

KEY INFRASTRUCTURE PROJECTS

Priority infrastructure projects will facilitate economic development in Mitchell Shire. The key areas of focus include:

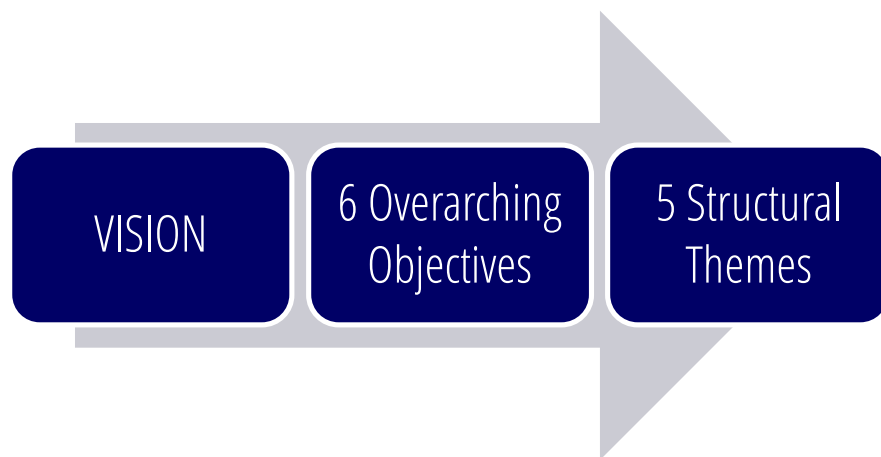
- Policy;
- Public Transport;
- Roads and Streetscapes;
- Education; and
- Enabling Infrastructure.

A comprehensive list of priority infrastructure projects is detailed in Section 8.

ECONOMIC DEVELOPMENT FRAMEWORK OVERVIEW

The following provides an overview of the economic development framework for Mitchell Shire. This chart aims to provide clarity around the key issues and opportunities for Mitchell Shire's economy and the key initiatives to facilitate economic growth in Mitchell Shire.

Economic Development Strategy Framework:



VISION FOR ECONOMIC DEVELOPMENT

The vision for economic development of Mitchell Shire is identified below. This draws on outcomes from consultation with Mitchell Shire's community and also relates to the State Government definition of local economic development.

"Mitchell Shire will build its economic capacity in order to improve its economic future and the quality of life for its communities. Mitchell Shire will work collaboratively with business, Government and other organisations to create better conditions for jobs and business growth".

OVERARCHING OBJECTIVES

The following overarching objectives are provided to define the emphasis of the Economic Development Strategy and Mitchell Shire Council's role in Economic Development over the next five years.

- Improve governance and systems within Mitchell Shire that support business
- Improve the liveability of Mitchell Shire including a mix of health services, housing and social and physical infrastructure to attract residents and businesses
- Provide increased focus and effort towards attracting industry that meets the needs and competitive strengths of Mitchell Shire
- Advocate for the upskilling, training and job readiness of Mitchell Shire's residents
- Strengthen engagement, relationships and communication with business
- Facilitate and advocate for investment strategic infrastructure which supports the economy and liveability of Mitchell Shire

THEMES

The following themes will be used to structure the economic development strategy so that it is accessible and clear to Mitchell's diverse community. The themes are set around a spatial representation of Mitchell Shire as the Shire's diverse geography, demographics and economy define the economic role and opportunities within each area. This is a unique element of Mitchell Shire which sets it apart from many other Local Governments in Victoria. The themes include:

- Best Practice in Economic Governance
- Establishment of Seymour as A Vibrant, Major Regional Centre
- Economically Productive Rural Areas
- Well Serviced and Liveable Growth Areas [Wallan, Beveridge and Surrounds]
- Strengthening Mitchell's Lifestyle Towns and Villages [Kilmore, Broadford, Heathcote Junction, Wandong]

1. PROJECT BACKGROUND

1.1. INTRODUCTION

Mitchell Shire Council has commissioned Urban Enterprise to prepare an Economic Development Strategy (EDS) for the Shire.

The aim of the Economic Development Strategy is to:

- Grow Mitchell's economy, with a focus on job generation and sustainable economic growth;
- Build on Mitchell's competitive advantages;
- Investigate the sub-regional economy variances in Mitchell Shire; and
- Identify projects that will lead to significant economic benefit for the region.

1.2. DEFINITIONS

1.2.1. MITCHELL SHIRE SUB REGIONS

For the purpose of data collection and analysis, Mitchell Shire has been divided into the following three sub regions:

- Seymour and Surrounds;
- Kilmore/Broadford; and
- Wallan and Surrounds.

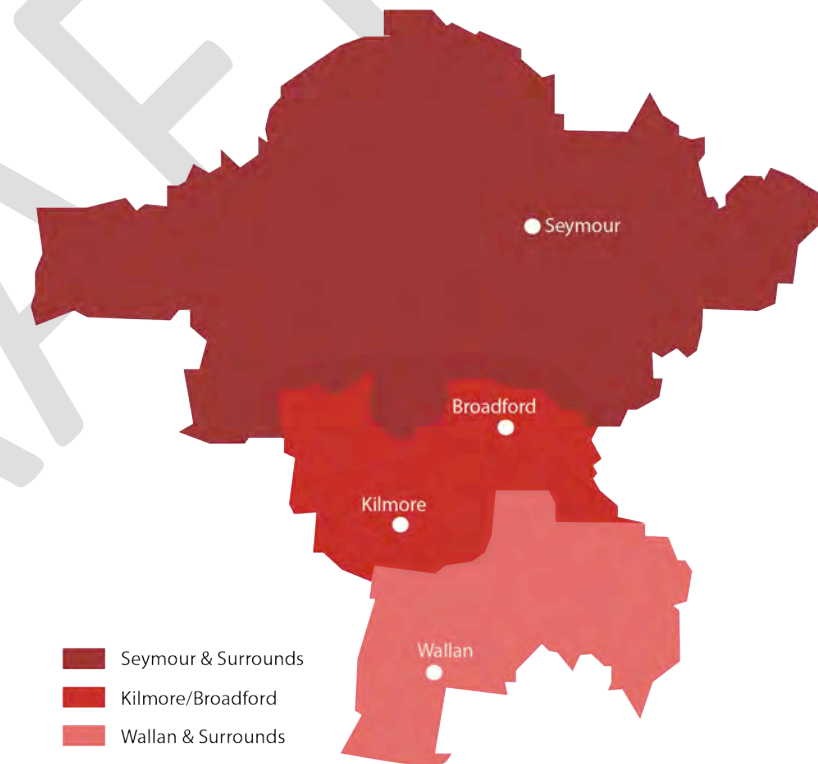
These three sub-regions have been established due to the significant variances in the sub regional economies within Mitchell Shire. Furthermore, each sub region comprises unique attributes including physical characteristics, resident and employment profile and population and housing growth.

- The 'Seymour and Surrounds' sub region includes the townships of Seymour, Puckapunyal, Tallarook, Trawool, Pyalong and Tooborac.
- The 'Kilmore/Broadford' sub region includes the townships of Kilmore and Broadford.

- The 'Wallan and Surrounds' sub region includes the townships of Wallan, Beveridge, Wandong/Heathcote Junction and Upper Plenty.

Figure 1 shows the three sub regions of Mitchell Shire.

FIGURE 1 MITCHELL SHIRE – SUB REGIONS



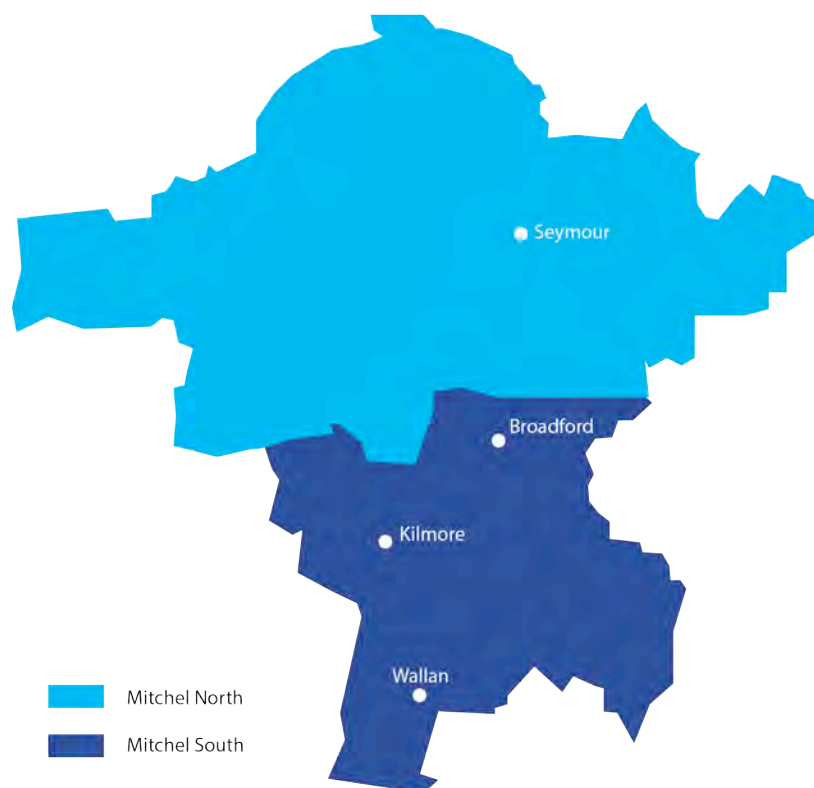
Source: REMPLAN map builder, Urban Enterprise 2016

1.2.2. MITCHELL NORTH / MITCHELL SOUTH

For the purpose of the demographic assessment of the resident population, Mitchell Shire has been divided into the following two Statistical Local Area's (SLA):

- Mitchell North; and
- Mitchell South.

FIGURE 2 MITCHELL NORTH / MITCHELL SOUTH



Source: REMPLAN map builder, Urban Enterprise 2016

1.2.3. HUME REGION (SA4)

The Hume region referred to throughout the report refers to the Statistical Area 4 located in North East Victoria. The Hume region is used as a benchmark for Mitchell in an economic context and includes the townships of Kilmore, Broadford, Seymour, Yea, Alexandra, Eildon, Mount Buller, Mansfield, Bonnie Doon, Nagambie, Euroa, Violet Town, Benalla, Wangaratta, Rutherglen, Wodonga, Beechworth, Corryong, Myrtleford and Bright

1.2.4. HUME CITY COUNCIL (LGA)

Hume City Council referred to throughout the report refers to the Hume City Council Local Government Area located in Northern Metropolitan Melbourne. Hume City Council adjoins the Whittlesea LGA to the east and Mitchell Shire to the North.

2. STRATEGIC CONTEXT

2.1. INTRODUCTION

The following section provides strategic context to the Mitchell Economic Development Strategy by outlining relevant local and state policy and highlighting key strategic directives.

2.2. STRATEGIC CONTEXT - KEY FINDINGS

There is local and state planning and policy support for Mitchell Shire to increase economic development through population and housing growth, development of existing and emerging industries, infrastructure and service provision, business support and tourism.

Mitchell Shire has, or is in the process of undertaking Structure Plans for a number of Mitchell's townships and growth areas which aims to support economic and business development. The Structure Plans in Mitchell South are planning for significant amount of growth that is expected in the Shire over the coming decades.

The previous Economic Development Strategy provided objectives to stimulate the local economy. These included housing and infrastructure provision, development of the tourism industry, employment opportunities in existing and emerging industries, business support and facilitation, land availability and liveability.

Strategic approaches to tourism include improving and diversifying the Shire's history/heritage, arts/culture, food and beverage and nature-based tourism offer and experiences.

Australian macroeconomic trends suggest that Health Care, Education, Transport and logistics, Agriculture and food processing are potential growth industries for Australia. Mitchell Shire is well placed to accommodate growth in these industries. Mitchell Shire must aim to facilitate this growth by supporting the existing business base, attracting new businesses suited to the competitive strengths of the Shire and providing adequate land and strategic policy to support opportunities.

2.3. STATE AND REGIONAL PLANNING POLICY

2.3.1. STATE PLANNING POLICY FRAMEWORK

The state policy planning framework, outlined in the Mitchell Shire Planning Scheme states that *'planning is to provide for a strong and innovative economy, where all sectors of the economy are critical to economic prosperity'*.

Furthermore, *'planning is to contribute to the economic wellbeing of communities and the State as a whole by supporting and fostering economic growth and development by providing land, facilitating decisions, and resolving land use conflicts so that each district may build on its strengths and achieve its economic potential'*.

2.3.2. PLAN MELBOURNE

Plan Melbourne is an evidence-based strategic vision for the development of Melbourne through to 2050. The plan outlines future areas of growth, particularly housing, commercial and industrial development.

The southern part of Mitchell Shire has been included within the growth areas of metropolitan Melbourne (Beveridge, Wallan and Lockerbie). Due to Mitchell Shire's location within the Northern growth corridor, it has a number of strategic advantages, including access to major highways, proximity to Melbourne and a rich natural environment.

Plan Melbourne outlines the long term vision for the development of an international freight terminal in Beveridge. The Beveridge International Freight Terminal (BIFT) is a long term vision for Mitchell South, however, its potential economic benefit should be considered.

2.4. LOCAL PLANNING POLICY

2.4.1. MUNICIPAL STRATEGIC STATEMENT

Mitchell Shire's Municipal Strategic Statement (MSS) states that Mitchell's economic performance will be influenced by a number of determining economic factors, which include, but are not limited to its location, economic profile, population growth, liveability, land availability, infrastructure and service provision, business support and facilitation, environment and climate change, and leadership and communication.

The MSS outlines several key issues that need to be overcome in order to promote economic growth in the shire and include:

- Ensuring sufficient land is available to attract investment and generate additional jobs;
- Ensuring the timely and efficient delivery of infrastructure and services;
- Improving the attractiveness of townships;
- Removing constraints on development to increase inward investment and visitation and improve liveability; and
- Providing a high level of support to the business community to nurture existing business and attract new operators to the Shire.

Mitchell Shire's primary objective is to *'facilitate new development and employment opportunities in business, industry and tourism'*.

The following strategies have been provided to achieve these objectives:

- Support potential growth industries including the equine industry, health and education sectors, transport, logistics, warehousing, value-added agriculture, viticulture, organic farming and new technologies.
- Encourage high quality residential and commercial development.
- Deliver infrastructure in a timely manner.
- Ensure adequate land availability.
- Protect and improve the attractiveness of towns, particularly main streets.
- Enhance traffic circulation and car parking within towns.

2.4.2. STRUCTURE PLANS

Seymour and Kilmore Structure Plans are currently underway, and there are precinct structure plans that are in the process of being developed by the Metropolitan Planning Authority (MPA).

There have been two Precinct Structure Plans (PSP) completed in Mitchell Shire (Lockerbie and Lockerbie North), as well as six not yet completed. The six not yet completed include Wallan, Beveridge North West, Beveridge North East, Beveridge South West, Beveridge Central and Northern Freight.

These areas in Mitchell South are projected to experience significant population, housing and employment growth over the coming decades due to its location within Metropolitan Melbourne's growth area. Townships located further North within Mitchell Shire are likely to experience flow on economic benefits from the projected increase in population.

The overarching aim of the structure plans within Mitchell South are to provide strategic direction to manage the expected growth and revitalise the town centres to improve the attractiveness and liveability of Mitchell.

Generally, the structure plans contain similar key directions and include:

- Creating modern 'country towns';
- Promote sustainable town growth and housing;
- Enhance open space networks and protect environmental networks;
- Encourage a healthy mix of land uses that foster prosperity and activity;
- Create thriving, active and complementary employment centres;
- Ensure the area can be easily accessible and sufficient transport infrastructure is made available.

2.4.3. MITCHELL SHIRE COUNCIL PLAN 2013-2017 (REVISED 2014)

The Council identified key objectives in promoting Mitchell Shire as a sought after peri-urban destination to live and work, as well as providing diverse housing opportunities, education and recreational facilities. The Plan aims to protect Mitchell's natural environment whilst promoting growth (particularly in the south of the Shire) and economic prosperity. Mitchell holds a strategic location as it is in close proximity and is accessible from Melbourne, whilst still having a 'country' feel.

The Council Plan is dedicated to developing a strong regional reputation and supporting local tourism and economic development opportunities.

A focus is to create ample job opportunities in existing and emerging industries, as well as attracting investment opportunities within the Shire.

2.4.4. MITCHELL SHIRE 2020 COMMUNITY PLAN

Mitchell 2020 Community Plan describes the community's long term vision for the municipality. The plan articulates a vision to achieve significant growth over a ten-year period.

The community identified the following goals for economic prosperity:

- Efficient, well-placed and high quality infrastructure and services that supports local economic activity.
- Best practice services for business.
- Local businesses that support fair employment, inclusive communities and fair trade.
- Educated and skilled workforce with local employment opportunities for residents.
- Effective and strong business networks and collaboration.
- Sound economic development while preserving residents' quality of life.
- A strong reputation where Mitchell's businesses are well known for their capabilities and products and services.

The Mitchell Shire 2020 Community Plan is an important document, as it reflects the community's priorities for the Shire for the future.

A key community priority that is outlined within the Plan is to *'partner with regional networks and agencies to facilitate economic growth'*.

Other priorities relate to the look and feel of the Shire, which will directly affect the attractiveness and liveability of the Shire, which will aid in promoting the economic growth of the Shire.

2.4.5. ECONOMIC DEVELOPMENT STRATEGY (2010)

The Economic Development Strategy, prepared in 2010, aimed to develop a range of strategies and key performance indicators to assist Council to facilitate the growth of a sustainable and healthy local economy.

The report identified six major economic drivers for the Shire and included:

- Population and household growth;
- Liveability;
- Land availability;
- Infrastructure and service provision;
- Business support and facilitation; and
- Leadership and communication.

The report identified ten priorities for economic growth within the Shire and they include:

- Finalise Structure Plans;
- Support investment and development opportunities for Seymour as identified in the Strategy and advocate Seymour to be designated as a regional city for the purposes of State Government economic planning;
- Support and promote the local equine industry and investigate opportunities to expand this industry sector;
- Prepare and implement a Branding Strategy for Mitchell Shire;
- Ensure that planning system works efficiently to facilitate development;
- Encourage the reinstatement of the Broadford Chamber of Commerce;
- Implement Special Rates Schemes where there is support from the chambers of commerce or trader's associations;
- Council to strongly advocate for improved infrastructure and community services with relevant levels of Government and other agencies;
- Develop a Business Investment Incentives policy; and
- Undertake a feasibility study for Business Incubator.

2.4.6. TOURISM STRATEGY 2010-2015 (2010)

Mitchell Shire's Tourism Strategy aims to facilitate the Shire in becoming a recognised tourist destination and to successfully promote townships within the Shire.

The objective of the strategy is to effectively brand the townships within the Shire, with well-developed tourism product, supported by effective marketing.

Mitchell Shire has a number of key tourism strengths including:

- An abundance of natural assets;
- Historical attractions;
- Access via major highways and train lines;
- Events; and
- Infrastructure.

The strengths of the Shire need to be promoted to attract return and new tourism visitation to the Shire. An opportunity exists to stimulate the local economy through an investment in tourism infrastructure and resources.

2.4.7. GOULBURN RIVER VALLEY TOURISM DESTINATION MANAGEMENT PLAN

The Destination Management Plan (DMP) provides a strategic approach to prioritising key tourism experiences and product development in the Goulburn Valley region.

The DMP split Mitchell Shire into two regions: Seymour and Surrounds and Kilmore/Broadford. The two regions were associated with the following strengths:

- Seymour and Surrounds – Military history, the Great Victorian Rail Trail, the Goulburn River, rail heritage; and
- Kilmore/Broadford – History and heritage and sports and recreation.

The following product gaps were realised for Mitchell Shire:

- Seymour and Surrounds – A quality cafe/boutique food and beverage offer, quality dining offer, high quality self-contained accommodation, the provision of conference facilities, boutique accommodation offer and local produce store in Tallarook that leverages off the Great Victorian Rail Trail.

- Kilmore/Broadford – quality food and beverage experience/offer, accommodation that caters for event and visiting friends and relative's visitors and the underutilisation of heritage buildings for tourist uses in Kilmore.

Wallan and Surrounds is not included in the GRVT DMP due to its partial inclusion within the Urban Growth Boundary, resulting in the area not specifically defined as a tourism region. Wallan and Surrounds, however, attracts visitors from metropolitan Melbourne visiting friends and relatives and also visitors using recreational walking and cycling tracks and trails.

The DMP outlines a number of priority projects that will boost the tourism offer and experience in the region, which in turn would significantly increase return visitation, as well as attracting new visitors to the region.

2.4.8. MITCHELL SHIRE ANNUAL ACTION PLAN 2015-2016

The Annual Action plan identifies the actions that Council will deliver in the 2015-2016 financial year to support the achievement of its strategic objectives and priorities.

The Action Plan states that Mitchell Shire prioritises a strong reputation and economy and will strongly advocate for the Shire's interest with other levels of government and will partner with regional networks and agencies to facilitate economic growth.

2.4.9. MITCHELL SHIRE ENVIRONMENT STRATEGY 2014-2024

The Mitchell Shire Environment Strategy was prepared to guide Council in its role as a custodian of Mitchell Shire's natural environment. It shows how Council can act, inform and guide over the next decade to conserve Mitchell's natural environment for the present and future.

Agriculture, forestry and fishing represent approximately 6% of the Shire's estimated economic output. The majority of rural areas within the Shire are utilised for agricultural purposes, including beef and wool farming, forestry and timber production, viticulture, olive production and other small enterprise farms.

Peri-urban areas of Victoria face a number of environmental challenges with urban encroachment being the major land management issue, particularly in the south of the Shire.

The rural areas of Mitchell Shire support approximately \$25 million worth of agricultural production annually. There is an opportunity to target growth industries, in which the Shire has a competitive advantage, particularly in the equine industry, transport, logistics and value-added agriculture, viticulture, organic farming and new technologies (solar/wind farming).

2.4.10. MITCHELL SHIRE SPORTS FIELD FEASIBILITY STUDY 2014

The Sports Field Feasibility Study was prepared to provide clear direction on the development of policies and guidelines to assist Council with the future planning and provision of active sporting reserves, and appropriate levels of infrastructure to support the future needs of residents.

An opportunity exists to explore the potential of Mitchell to become a premier regional and state sporting destination for Australian rules, golf, soccer, tennis, netball and equine. There is existing sporting infrastructure throughout the Shire that services the local population and the close proximity to Melbourne and ease of access provides a major opportunity.

2.4.11. MITCHELL SHIRE ARTS, CULTURE AND EVENTS STRATEGY

This strategy outlines directions and framework for Council's involvement in events, arts and culture in the Shire. The arts, culture and events sector is an important economic sector for regional areas in Victoria. It actively increases visitation and thus has flow on economic benefits for the Shire.

Mitchell Shire has a rich cultural heritage, thus providing an opportunity to develop further for local involvement as well as visitor experience. The potential development of arts, culture and events will help develop Mitchell as a tourist destination and contribute to the branding and identity of the Shire.

2.5. MACROECONOMIC CONTEXT

The following section provides an assessment of the national and state economic outlook. An identification of macroeconomic indicators will provide a snapshot of industries that are in decline, and those that are emerging. A general assessment of the economy will be provided in terms of employment, industry, property and growth.

2.5.1. THE NATIONAL ECONOMIC OUTLOOK

Over the past five years, since the adoption of the current Economic Development Strategy, there have been a number of major shifts in the international economy which have impacted Australia including the onset of the Global Financial Crisis (GFC), the continued economic rise of China, and the Euro zone crisis. Despite these challenges, economic growth in Australia has remained steady.¹

Investment in the mining sector, which has been a significant driver of the Australian economy over the past five years, is in decline as mining operations move from construction, to less labour intensive production phases. This drop in investment is expected to be gradually offset by non-mining sectors supported by continued low interest rates, increasing business confidence and the slow and steady economic recovery following the slowdown created by the GFC. Construction, in particular housing construction, has been identified as a key economic driver in the short-term, but there are concerns over the sustainability of this industry.

A report released by Deloitte, *Positioning for Prosperity? Catching the Next Wave*, identified five industries which can collectively fill the void of mining in driving future economic growth: Agribusiness, Gas, Tourism, International Education, and Wealth Management.

Australia has experienced weak growth over the past ten quarters, with six of the past ten quarters experiencing growth of 0.5% or less. The slow growth rate will likely have a negative effect on jobs in the near future.²

Although consumer confidence is low and the Australian Dollar generally being weak, consumer spending is positive with consumers spending on recreation and culture, rent, household furniture & equipment and food and entertainment.

The weakened Australian dollar is also having a positive effect on domestic and international tourism. 2014 resulted in Australia experiencing higher levels of international visitation with international airline seats (in-bound) up 8%,

¹ ABS, Measures of Australia's Progress, 2013

² Australian Bureau of Statistics (ABS)

whilst there is an increase in domestic overnight trips (5%). It is expected that the positive effects of the weak value of the Australian dollar will be experienced two years after the official fall in the dollar.³

2.5.2. THE STATE ECONOMIC OUTLOOK

A decline in the automotive manufacturing industry has resulted in Victoria shifting its focus towards emerging industries.

Victoria's diversified industry base includes advanced manufacturing and a range of business services. Employment in the Professional, scientific and technical services sector reflects this growing employment, providing 8.7% of state employment, up from 6.8% a decade earlier.

The Health care and social assistance industry is an increasingly important source of employment. Over the past decade this sector has grown to become Victoria's largest employer with 12% of state employment. Although the Retail sector has declined in relative size, it remains important with 11% of total state employment.

While continuing to contract as a proportion of the overall Victorian economy, the Manufacturing industry continues to be a significant source of employment. In November 2013, Manufacturing's share of total employment in Victoria was 9.3%, comprising 270,000 people.

Department of Employment projections suggest that over the next five years, Australian employment growth is most likely to be found in Health care and social assistance, Construction and Retail trade, with smaller contributions from Professional, scientific and technical services and Accommodation and food services.⁴

In line with brighter consumer outlook, Victoria's property market has improved significantly. There has been growth in dwelling approvals, auction activity and continued population growth is likely to support dwelling investment in the medium term.

Business investment is expected to grow modestly. Nonetheless, confidence has improved and financing conditions remain favourable.

Continued growth in other states will benefit Victoria through increased net interstate trade. The flows in interstate trade are likely to come from knowledge, innovation and technology-based industries that are based in the state such as biotechnology.⁵

2.5.3. LOCAL ECONOMIC CONTEXT

The following Figure 3 (page 18) shows Mitchell's position within the regional economy in respect of existing population and jobs. Mitchell Shire is located in between Melbourne and the major regional centres of Shepparton and Bendigo. The Figure compares the population and jobs of the major townships of Mitchell Shire with adjoining areas.

Figure 3 also shows key economic assets within, and surrounding the Shire that provide flow on economic benefits for the townships in Mitchell Shire. There may be opportunities to further leverage off these assets in the future. Key economic assets include the Goulburn Valley food bowl, Puckapunyal Army Barracks, the Broadford State Motorcycle Complex, Mangalore Airport, the Epping Wholesale Produce Market, Merrifield Precinct (underway) and the Racecourses located in Seymour and Kilmore.

³ Tourism Research Australia, State of the Industry, 2014

⁴ Department of Industry, Growing opportunities, South Australian and Victorian Comparative Advantages, 2014

⁵ Colliers Property Outlook, 2014

3. ECONOMIC CONTEXT

3.1. INTRODUCTION

The following section provides a demographic and economic profile of Mitchell Shire. Utilisation of data relating to population, employment, existing and emerging industry output will provide a detailed assessment of Mitchell's position within the regional and state economy. Figure 3 shows the context of Mitchell Shire in the broader region in respect of population, jobs and key economic assets.

This section identifies the key propulsive industries in Mitchell Shire, as well as identify the emerging industry sectors that could be further developed in the short to medium term.

An assessment of macroeconomic indicators, as well as benchmarking of key economic data pertaining to employment, industry, agricultural production, business, lifestyle and liveability will identify potential economic opportunities for the Shire to stimulate sustainable economic growth.

3.2. ECONOMIC CONTEXT - KEY FINDINGS

ECONOMIC PROFILE

Mitchell Shire has a Gross Regional Product (GRP) of \$1.43 billion and an estimated total economic output of \$2.37 billion. The major contributors of total output are Manufacturing, Construction and Public administration and safety.

In 2011, there were a total of 9,484 jobs in Mitchell Shire. This number fell by 0.24% from 2011 to 2015, with 9,393 jobs in Mitchell Shire in 2015.

Public administration and safety is the highest employing industry within the Shire (15.8%), followed by Healthcare and Social Assistance (12.3%) and Retail Trade (11.7%).

Some of the Key employers in the region include Puckapunyal Army Barracks, Hospitals in Seymour and Kilmore, Schools, Supermarkets, Mitchell Shire Council, Ralphs Meats and Nestle.

The agricultural sector provides a comparatively low level of employment given the size of Mitchell Shire. This is due to much of the rural land being dedicated to broad hectare cattle farming and cropping, which have low requirement for labour.

Niche industries that are not adequately included in census definitions are equine and tourism. Anecdotally the equine industry is significant, with two racecourses (Kilmore and Seymour), many thoroughbred trainers and breeders and a strong recreational equine sector. Initial estimates suggest that the equine sector provides more than \$100 million in economic output to the region, significantly higher than the agriculture sector which is estimated at around \$25 million.

Data from the Destination Management Plan suggests that the tourism sector for Mitchell attracts 560,000 people, provides a total output to the Shire of around \$97 million and contributes 660 jobs.

KEY INDUSTRY SECTORS

The key propulsive industries in Mitchell Shire are Public Administration and Safety (Defence – Puckapunyal Army base), Manufacturing (Sugar and Confectionary - Nestle) and Construction. These sectors are important for the existing economic activity in the Shire in terms of economic output, employment and value added to the local economy.

Emerging industries in Mitchell Shire include Health Care, Transport, Education and Accommodation and food services. Mitchell Shire Council has the opportunity to further attract these industries to the Shire and facilitate economic growth by accommodating their business needs and diversifying the economy. This can be achieved through internal/external consultation, business innovation and attraction and investment attraction.

RESIDENT PROFILE

In 2015, the estimated population of Mitchell Shire was 39,581. Mitchell Shire has experienced consistent population growth in the south of the Shire. Approximately two thirds of Mitchell Shire's population are located in Mitchell South. Mitchell North experienced a decline in population from 2001 to 2006 and only grew by 0.2% from 2006 to 2011.

The overwhelming majority of population growth has occurred and is projected to occur in the Mitchell South. Major residential growth is occurring in Beveridge and Wallan with growth projected to continue within these areas.

There is an even distribution of population between the three sub regions, with Wallan & Surrounds the most populated (12,029), followed by Kilmore/Broadford (11,948) and Seymour and Surrounds (10,602).

Mitchell South has a high proportion of children between the ages of 0 and 19, as well as a high proportion of residents between 35 and 49 years of age, suggesting that there are a high proportion of families in the Shire.

The age profile in Mitchell North is slightly older than Mitchell South with approximately 22.2% of the population over the age of 60, compared with Mitchell South (15.6%).

Data suggests that Mitchell North is experiencing below average population growth and the existing resident population is ageing. Whereas, Mitchell South is projected to experience strong population growth, generally families who are seeking affordable housing opportunities.

The resident and employment profile highlights vast differences in the Shire in terms of growth. It will be important for the economic development strategy to address issues at a sub-regional level. For example, the high growth of Mitchell South creates issues in terms of providing services and local jobs to meet the growing population, whilst in Mitchell North the key issue is to stem the aging population and stagnant growth through resident and business attraction.



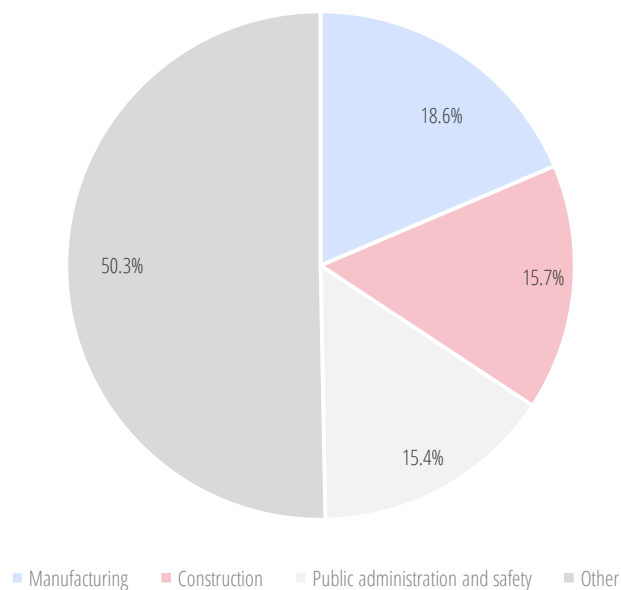
3.3. ECONOMIC PROFILE OF MITCHELL SHIRE

3.3.1. OUTPUT – KEY SECTORS

The following section provides an economic profile of Mitchell Shire. Data relating to economic output, industry and employment was collected and analysed from Australian Bureau of Statistics (ABS) and REMPLAN.

Mitchell Shire has a Gross Regional Product (GRP) of \$1.43 billion and an estimated total economic output of \$2.37 billion. The major contributors of total output are Manufacturing, Construction and Public Administration and Safety (shown in Figure 4).

FIGURE 4 ECONOMIC OUTPUT – MITCHELL SHIRE



Source: REMPLAN 2015

3.3.2. EMPLOYMENT BY INDUSTRY

Figure 5 shows the employment in Mitchell Shire in 2015 by industry type compared to the Hume region. Data was prepared using REMPLAN.

In 2011, there were a total of 9,484 jobs in Mitchell Shire. This number fell by 0.24% from 2011 to 2015, with 9,393 jobs in Mitchell Shire in 2015.

Public administration and safety is the highest employing industry within the Shire (15.8%). Puckapunyal army base is the largest employer in the Shire, with approximately 1,200 people employed. Health care and social assistance comprises 12.3% of total people employed in the Shire. The Kilmore and District Hospital and the Hospital in Seymour District Memorial Hospital employ a combined total of 350 people. The Retail trade industry sector employs 11.7% of the population in the Shire.

The number of Construction jobs within the Shire decreased by 2.9% between 2011 and 2015. There is potential for job opportunities in the Construction industry to increase due to the expected housing growth in the southern parts of the Shire, notably in Beveridge and Wallan.

Jobs in Accommodation and food services and Agriculture, forestry and fishing in the Shire fell slightly from 2011 to 2015. There is an opportunity for additional jobs to be created within Transport, postal and warehousing due to Mitchell Shire's strategic location along major highways within the Northern Growth Corridor.

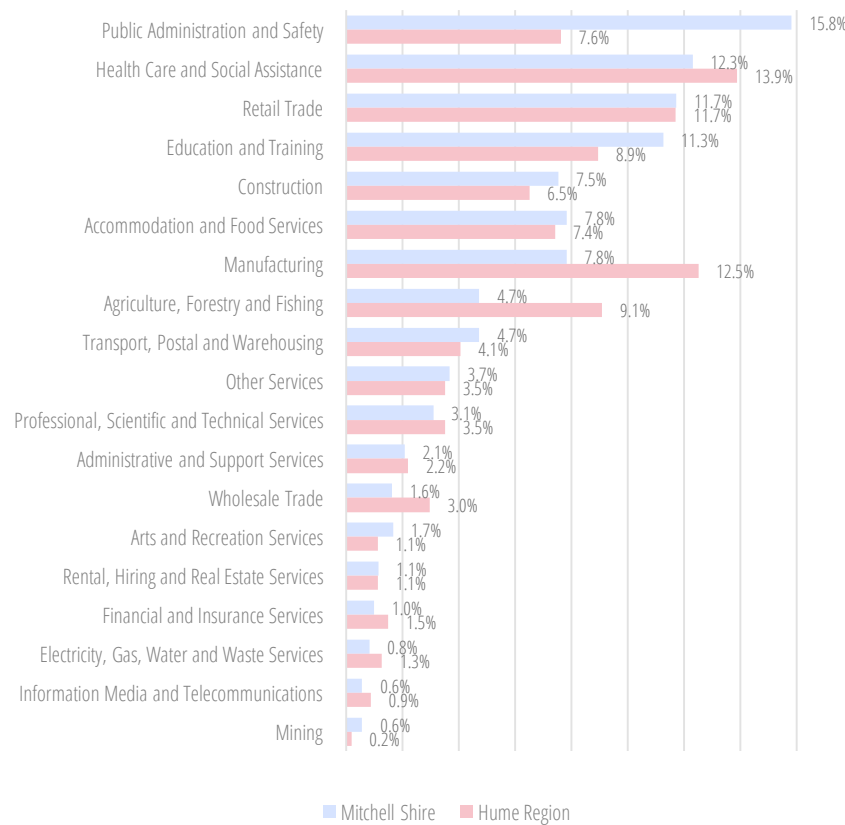
Health care and social assistance is the highest employing industry in the Hume region, providing 13.9% of employment. Manufacturing provides 12.5% of employment in the Hume region, which is significantly higher than Mitchell Shire (7.8%). There may be opportunity to grow the local Manufacturing industry in Mitchell Shire to provide more employment opportunities. The Shire's advantageous geographic location, land reserves and existing access to transport infrastructure provides strategic pre requisites for this sector. Major manufacturing in the Shire includes:

- Sugar and confectionary;
- Professional and scientific equipment;
- Bakery product
- Meat and meat product;
- Other food manufacturing;
- Current, lime, plaster and concrete product;

- Other wood product;
- Pulp, paper and paperboard.

Agriculture, forestry and fishing, Wholesale trade and Financial and insurance services are also underrepresented in Mitchell Shire compared to the Hume region.

FIGURE 5 EMPLOYMENT BY INDUSTRY – MITCHELL SHIRE

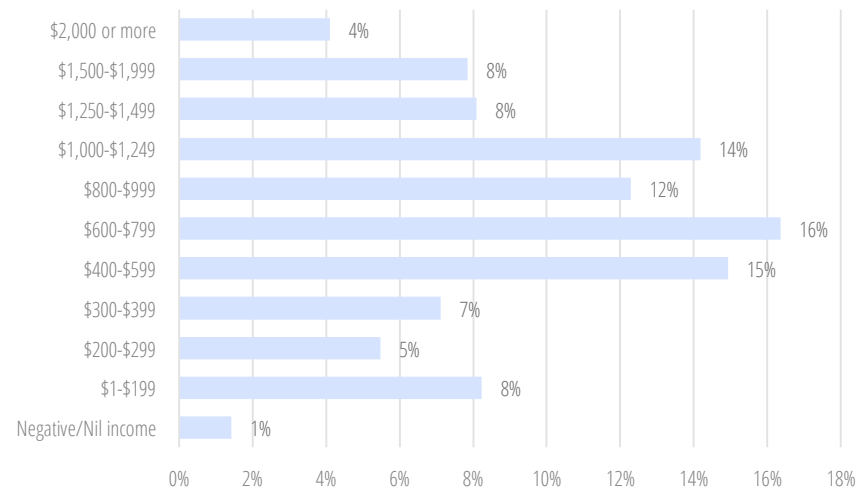


Source: ABS, Employment by Industry 2011, REMPLAN 2015

3.3.3. PERSONAL INCOME

Figure 6 shows the average income per week, per job in Mitchell Shire as at August 2015. The highest proportional personal income bracket for Mitchell Shire is \$600-\$799 per week (16%), followed by \$400-\$599 (15%) and \$1,000-\$1,249 (14%). The median weekly personal income in Victoria in 2011 was \$548 (ABS).

FIGURE 6 AVERAGE WEEKLY INCOME PER JOB – MITCHELL SHIRE

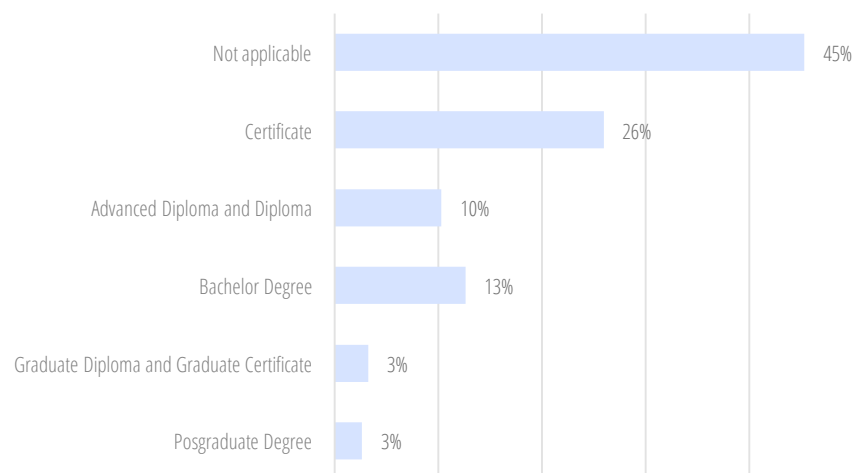


Source: REMPLAN, income 2015

3.3.4. LEVEL OF EDUCATION

Figure 7 shows the level of education for people working in Mitchell Shire. 45% of the working population within Mitchell Shire have no qualification (not applicable), 26% have a certificate, 13% have a bachelor degree and 10% have an advanced diploma.

FIGURE 7 WORK IN MITCHELL - LEVEL OF EDUCATION



Source: REMPLAN, Level of Education 2015

3.3.5. LEVEL OF DISADVANTAGE

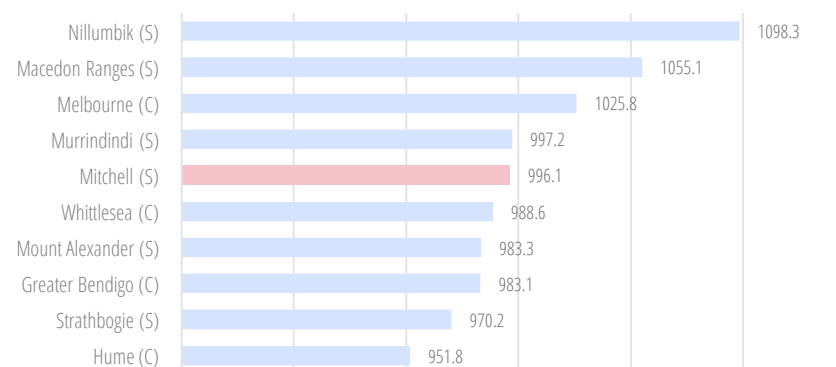
Socio Economic Indexes for Areas (SEIFA) measures the relative level of socio-economic disadvantage based on a range of Census characteristics.

The index is derived from characteristics that reflect disadvantage such as low income, low educational attainment, high unemployment, and jobs in relatively unskilled occupations. When targeting services to disadvantaged communities, it is important to also look at these underlying characteristics as they can differ markedly between areas with similar SEIFA scores and shed light on the type of disadvantage being experienced.

A higher score on the index means a lower level of disadvantage, whilst a lower score on the index means a higher level of disadvantage.

In 2011, Mitchell had a SEIFA index of 996.1, which is approximately in the mid-section of all Local Government Areas in Victoria. The following Figure 8 shows the SEIFA Index for Mitchell and surrounding Local Government Areas. Mitchell has a relative low level of disadvantage when compared to adjoining LGAs such as Strathbogie and Hume.

FIGURE 8 SEIFA INDEX



Source: Profile ID, SEIFA Index 2015

3.3.6. JOURNEY TO WORK

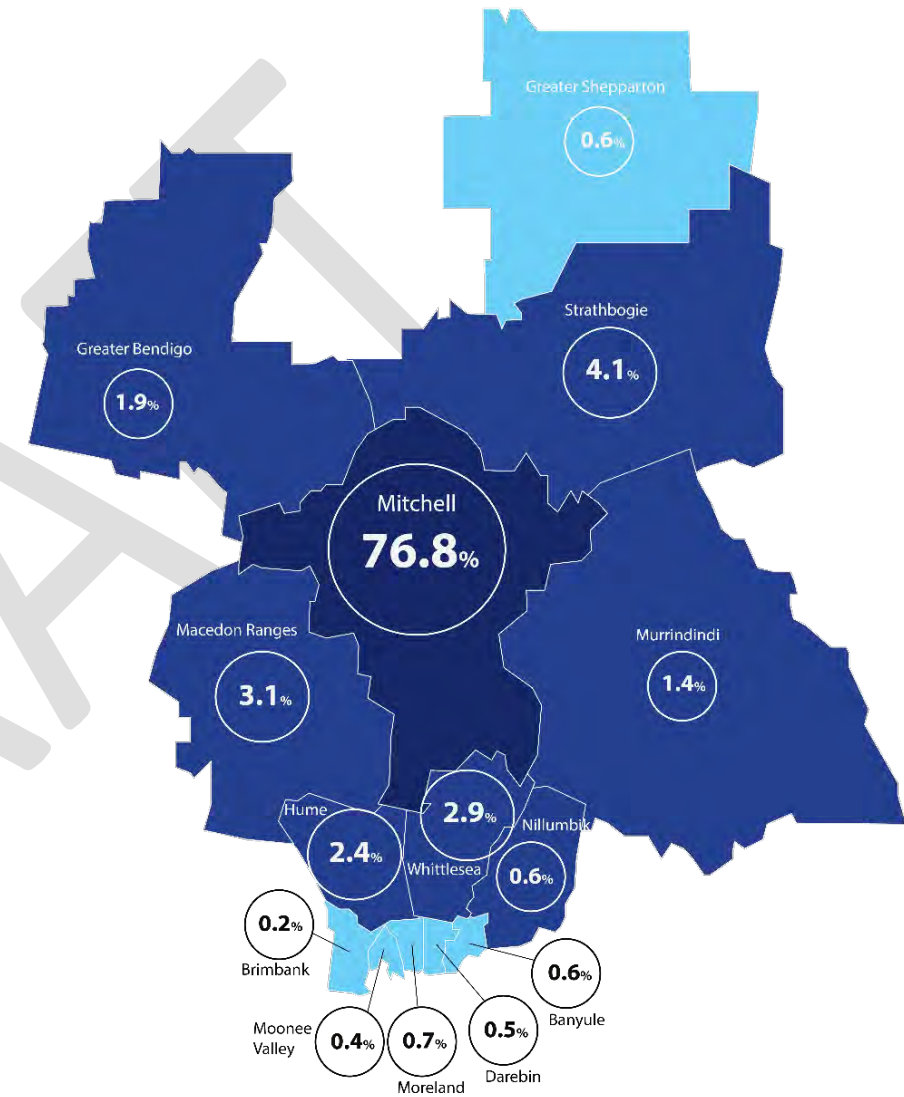
Table 1 shows the location of residence for people who work in Mitchell Shire. A majority of employees who work in Mitchell, live in Mitchell Shire (76.8%). Adjoining Local Government Areas make up the majority of remaining locations of residence for workers; Strathbogie, Macedon Ranges, Whittlesea and Hume.

TABLE 1 WORK IN MITCHELL - PLACE (LGA) OF RESIDENCE

LGA	2015
Mitchell	76.8%
Strathbogie	4.1%
Other	4.1%
Macedon Ranges	3.1%
Whittlesea	2.9%
Hume	2.4%
Greater Bendigo	1.9%
Murrindindi	1.4%
Moreland	0.7%
Greater Shepparton	0.6%
Banyule	0.6%
Nillumbik	0.6%
Darebin	0.5%
Moonee Valley	0.4%
Brimbank	0.2%

Source: REMPLAN, LGA of usual residence 2015

FIGURE 9 WORK IN MITCHELL - PLACE (LGA) OF RESIDENCE



Source: REMPLAN, LGA of usual residence 2015, Urban Enterprise 2016

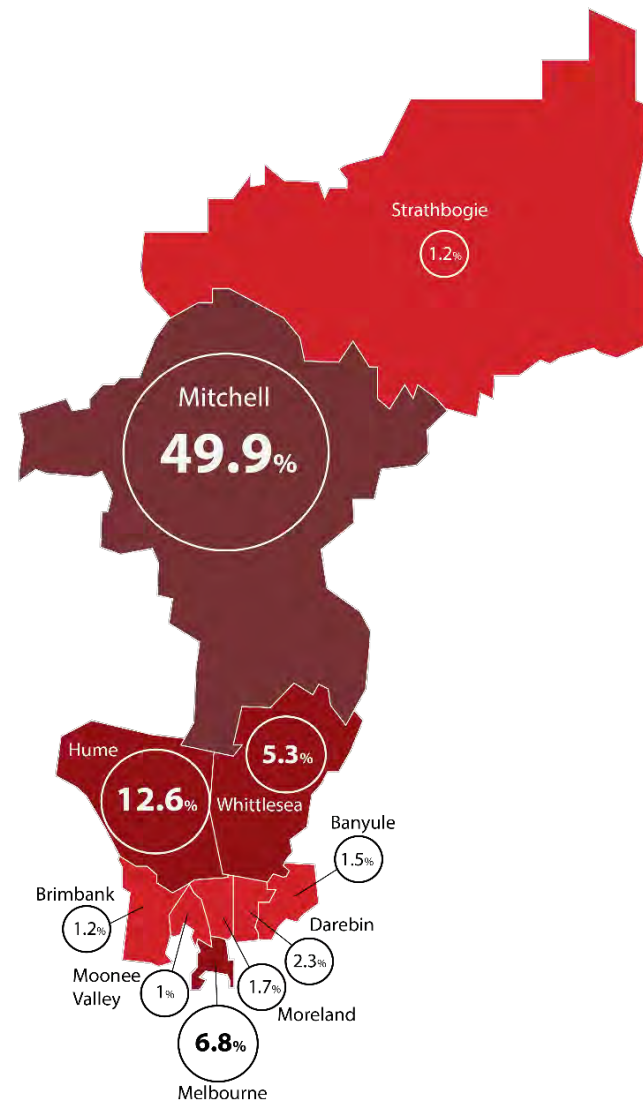
Table 2 shows the place of work (LGA) for the total employed population in Mitchell Shire. Almost half of the working population of Mitchell Shire, live and work in Mitchell. 12.6% of residents commute to Hume City Council and 6.8% commute to the City of Melbourne. The following Table highlights that a significant proportion of the resident population commute to areas of Metropolitan Melbourne.

TABLE 2 LIVE IN MITCHELL - PLACE (LGA) OF WORK

LGA	2015
Mitchell	49.9%
Hume	12.6%
Other	10.6%
Melbourne	6.8%
Whittlesea	5.3%
Darebin	2.3%
Moreland	1.7%
Banyule	1.5%
Strathbogie	1.2%
Brimbank	1.2%
Moonee Valley	1.0%
Yarra	0.9%
Port Phillip	0.8%
Macedon Ranges	0.6%
Hobsons Bay	0.5%
Greater Bendigo	0.5%
Wyndham	0.4%
Greater Shepparton	0.4%
Nillumbik	0.4%
Monash	0.3%
Murrindindi	0.3%
Boroondara	0.3%
Whitehorse	0.3%
Maribyrnong	0.3%

Source: REMPLAN, LGA of usual work 2015

FIGURE 10 LIVE IN MITCHELL - PLACE (LGA) OF WORK



Source: REMPLAN, LGA of usual work 2015, Urban Enterprise 2016

3.4. KEY INDUSTRY SECTORS

This section outlines the key propulsive, medium propulsive and low propulsive industries in Mitchell Shire. This section also identifies emerging, growth and mature sectors, as well as industry sectors that are potentially in decline. This assessment will identify the implications of economic development in Mitchell Shire.

Data for Mitchell Shire has been collected and analysed using the REMPLAN economic modelling and planning system.

3.4.1. KEY PROPULSION SECTORS

The following sectors are the key propulsive industries in Mitchell Shire, in terms of employment, regional exports and value adding to the Shire's economy. Key propulsive industry segments include:

- Public Administration and Safety (Defence – Puckapunyal Army Base);
- Manufacturing (Sugar and Confectionary – Nestle);
- Construction;
- Transport, Postal and Warehousing;
- Agriculture, Forestry and Fishing (Sheep, grains, beef and dairy cattle farming); and
- Health Care and Social Assistance.

The two key propulsive industries in Mitchell Shire are Public Administration and Safety and Manufacturing. Puckapunyal Army Base has been in operation in 1939 and although the Base has varied in size throughout its operation, the long term operation of the base is secure. The Defence sector (Puckapunyal Army Base) employs the largest number of people in the Shire and adds 18% of value to the local economy, whilst contributing 16% to the total economic output.

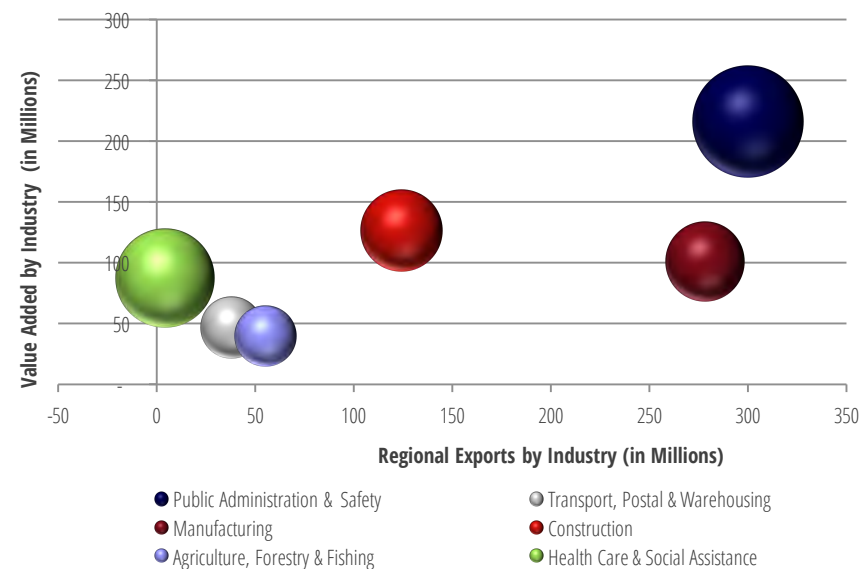
The Nestle factory in Broadford adds 8.5% of total value to the Shire's economy and contributes 19% of the total output as Nestle has a large proportion of exports.

Puckapunyal Army Base and the Nestle Factory have had a long term presence in the Shire and add significant value to the local economy, however, there is a lack of diversification in the Shire and more of these major employers are required to facilitate economic growth. Puckapunyal and Nestle are not locally owned and thus it is likely that supply chains are already established.

The Construction industry is experiencing a high level of growth due to the increase in residential and commercial growth in Mitchell South, notably in Wallan and Kilmore. The challenge is to promote the sustained economic growth that is occurring in the Construction industry in Mitchell Shire.

Figure 11 shows the key propulsive industries in Mitchell Shire.

FIGURE 11 KEY PROPULSIVE INDUSTRIES



3.4.2. MEDIUM PROPULSION INDUSTRIES

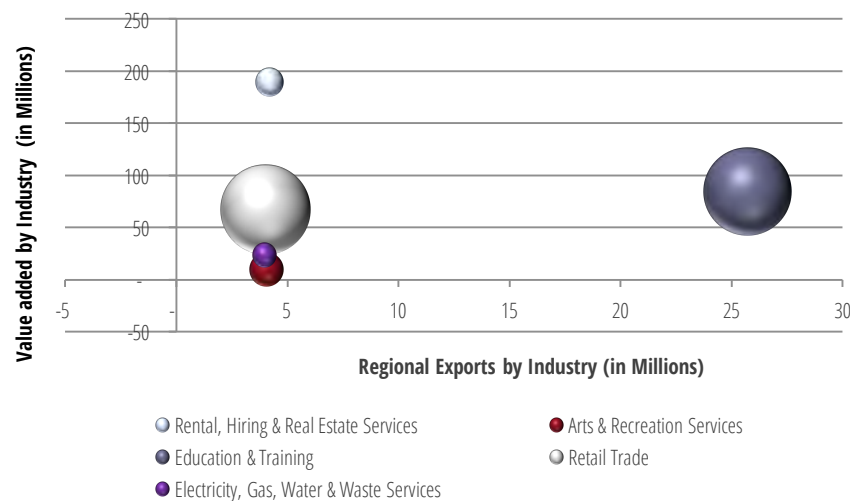
The following industries are medium propulsion sectors within Mitchell Shire and include:

- Education;
- Retail Trade;
- Arts and Recreation Services;
- Rental, Hiring and Real Estate Services; and
- Electricity, Gas, Water and Waste Services.

Education and Retail trade are the two largest employing medium propulsive sectors. Medium propulsive sectors generally grow proportionately with population and housing. Demand for Education, Real Estate Services, Retail trade and Electricity, Water, Gas and Waste Services industries increase as the resident population increases.

There is a need to increase the number of medium propulsion sectors in the Shire.

FIGURE 12 MEDIUM PROPULSIVE INDUSTRIES

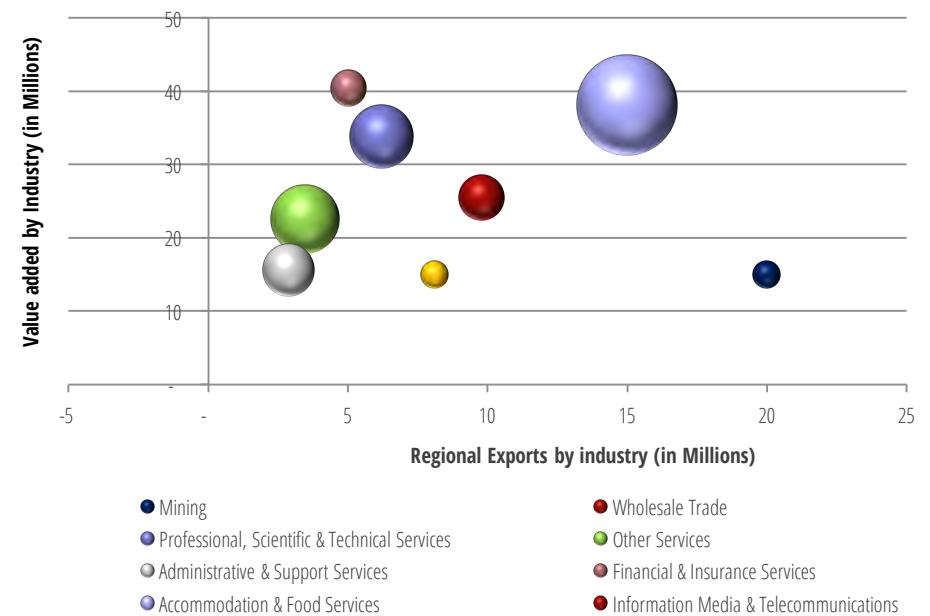


3.4.3. LOW PROPULSIVE INDUSTRIES

Figure 13 shows the low propulsive industry sectors in Mitchell Shire and include the following:

- Mining;
- Wholesale trade;
- Accommodation and Food Services (Food and Beverage)
- Professional, Scientific and Technical Services;
- Administrative & Support Services (Employment Travel Agency and Other Administrative Services);
- Financial and Insurance Services;
- Information Media and Telecommunications (Publishing, excludes internet and music publishing); and
- Other Services (Automotive Repair and Maintenance).

FIGURE 13 LOW PROPULSIVE INDUSTRIES



3.4.4. EMERGING, GROWTH, MATURE AND DECLINING INDUSTRIES

Table 3 identifies the industry sectors in Mitchell Shire which are emerging, growing, maturing and potentially declining. There is a small number of key sectors which are driving economic growth in the Shire.

The key emerging propulsive industries in the Shire are Transport, Health Care and Construction. These industries compliment the Shire's competitive advantages which include:

- Transport - location, access and proximity to transport infrastructure (Hume Freeway, Goulburn Valley Highway, Melbourne Airport, Port of Melbourne)
- Health Care – Two district Hospitals (Kilmore and Seymour), medical centres and disability/aged care services
- Construction – Projected increase in residential and commercial construction, particularly in Mitchell South.

The industry sectors that are identified as growth sectors include Education and Accommodation and Food Services. These two industry sectors significantly grew in employment from 2006 to 2011.

The industries that are potentially in decline in Mitchell Shire include Manufacturing, Retail Trade and Arts and Recreation. Whilst still important contributors to the local economy in terms of value added and employment within the Shire, indicators such as a decrease in the number of people employed from 2006 to 2011 and a decrease in regional exports suggests that these industries are potentially in decline.

TABLE 3 KEY INDUSTRY SECTORS SUMMARY

Segment	Propulsion	Status	% Local spend
Transport	Key	Emerging	5%
Health Care	Key	Emerging	3%
Construction	Key	Emerging	23%
Manufacturing	Key	Decline	19%
Education	Medium	Growth	2%
Retail	Medium	Decline	4%
Arts and Recreation	Medium	Decline	2%
Accommodation and Food Services	Low	Growth	3%

3.5. ECONOMIC PROFILE – MITCHELL SHIRE SUB REGIONS

The following section provides an assessment of the economic profile of Mitchell Shire, divided into three sub regions and include:

- Seymour & Surrounds;
- Kilmore/Broadford; and
- Wallan & Surrounds.

3.5.1. EMPLOYMENT BY INDUSTRY

Figure 14 shows employment by industry for the Mitchell Shire sub regions in 2011. Almost 20% of employment in Seymour and Surrounds was in the Public administration and safety industry. This reflects the employment role of Puckapunyal army base. A further 10% are employed in Health care and social assistance and 10% in Retail trade. Other significant employment industries in the sub region include Construction, Manufacturing and Accommodation and food services.

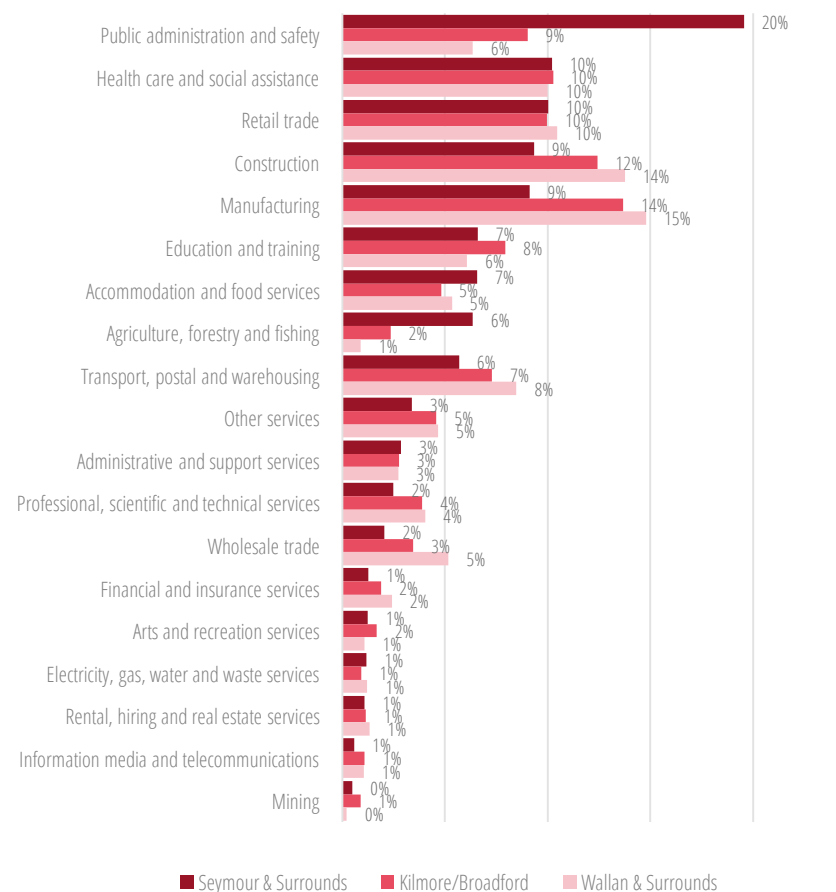
Manufacturing is the major employment industry in the Kilmore/Broadford sub region 14% of total jobs, followed by Construction (12%), Health care and social assistance (10%) and Retail trade (10%).

The major industries in Wallan and Surrounds include Manufacturing (15%), Construction (14%), Health care and social assistance (10%) and Construction (10%).

Figure 14 highlights that the majority of the industries within the Shire are quite equal with level of employment, excluding Public administration and safety in Seymour and Surrounds, which makes up one fifth of employment in the sub region.

Mitchell's advantageous location within the Northern Growth Corridor presents numerous opportunities to develop industries such as Transport, postal and warehousing. The Construction industry will continue to grow due to the significant level of residential development occurring and due to occur within Wallan and Surrounds.

FIGURE 14 EMPLOYMENT BY INDUSTRY – SUB REGIONS



Source: ABS, Industry by Employment, 2011

3.5.2. OCCUPATION OF RESIDENTS

Table 4 shows the occupations of workers in the three sub regions of Mitchell Shire and the percentage of workers within that particular occupation.

There is an even spread of occupations across the three sub regions of Mitchell Shire. Community and personal service workers make up 16% of total workers in Seymour and Surrounds. 14% of the workforce are Managers and 14% are Technicians and trade workers. The high number of managers in Seymour and Surrounds most likely reflects a high number of farm managers.

20% of workers in Wallan and Surrounds and 19% of workers in Kilmore/Broadford are Technicians and trade workers. A further 16% of workers in Wallan and Surrounds and 15% in Kilmore/Broadford are Clerical and administrative workers.

TABLE 4 OCCUPATION – SUB REGIONS

Occupation	Seymour & Surrounds	Kilmore/Broadford	Wallan & Surrounds
Managers	14%	11%	12%
Professionals	13%	14%	12%
Technicians and trade workers	14%	19%	20%
Community and personal service workers	16%	11%	9%
Clerical and administrative workers	12%	15%	16%
Sales workers	9%	8%	10%
Machinery operators and drivers	8%	10%	11%
Labourers	14%	13%	9%
Total Employed	4,583	5,259	5,725

Source: ABS, Occupation, 2011

3.5.3. NUMBER OF BUSINESS

According to REMPLAN, there are approximately 3,800 businesses operating in Mitchell Shire as at 2015. Figure 15 shows the breakdown of businesses by industry for the three sub-regions in Mitchell Shire. Figure 15 shows the proportion of businesses within each sub region.

Businesses registered in the northern part of the Shire are generally in the Agriculture, forestry and fishing and Construction industries. There are a large proportion of Financial and insurance service and Professional, scientific and technical service businesses spread across the Shire.

SEYMOUR AND SURROUNDS

There are a total of 854 registered businesses within the Seymour and Surrounds sub region. 19.1% of business are in the Construction industry, with a further 9.7% in the Agriculture, forestry & fishing industry, 9.1% in Financial and insurance services and 7.4% in Manufacturing.

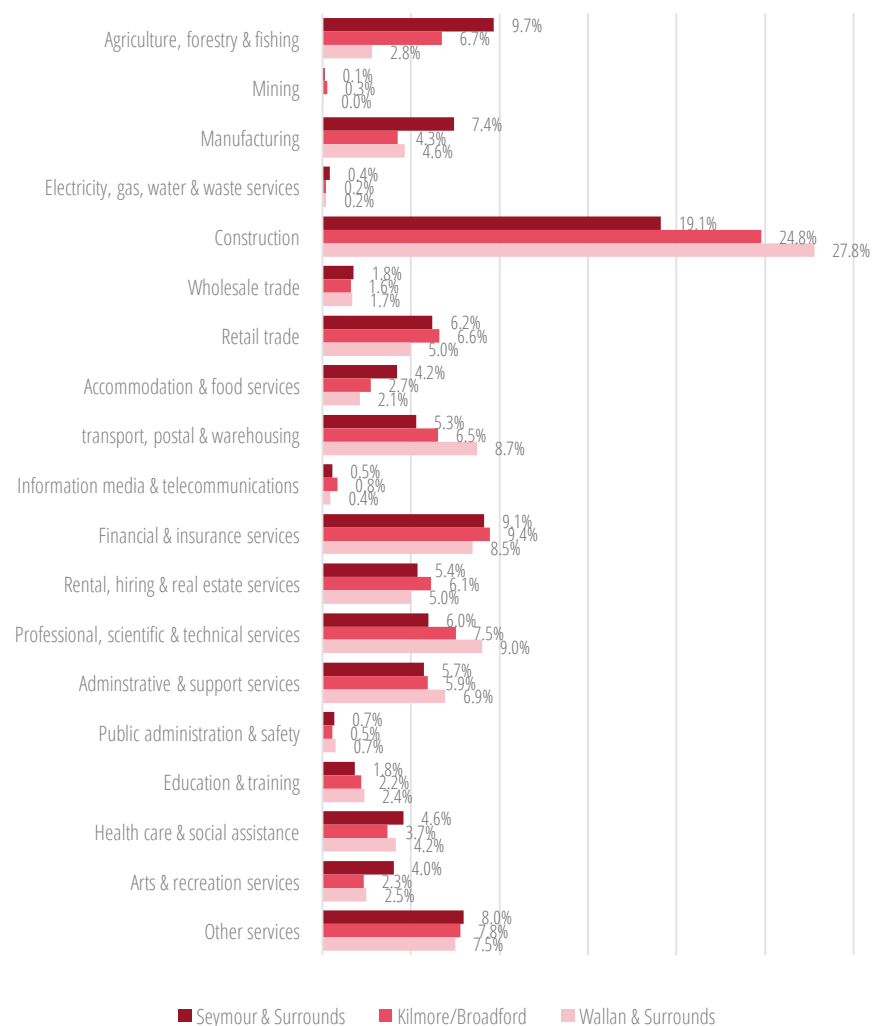
KILMORE/BROADFORD

There are a total of 1,326 registered businesses within the Kilmore/Broadford sub region. 24.8% of business are in the Construction industry, with a further 9.4% in the Financial and insurance services industry, 7.5% in Professional, scientific and technical services and 7.0% in Agriculture, forestry and fishing.

WALLAN AND SURROUNDS

There are a total of 1,498 registered businesses within the Wallan and Surrounds sub region. 27.8% of business are in the Construction industry, with a further 9.0% in Professional and scientific services, 8.7% in the Transport, postal and warehousing industry and 8.5% in Financial and insurance services.

FIGURE 15 BUSINESSES – SUB REGIONS



Source: Type of businesses, REMPLAN 2015

3.6. RESIDENT PROFILE

The following provides a historic, current and projected future assessment of Mitchell Shire's demographic profile to understand the existing and projected resident and working population. Australian Bureau of Statistics (ABS) Census, Victoria in Future, and SEIFA data has been collected and analysed for this assessment.

For the purpose of this assessment, Mitchell Shire has been divided into two statistical areas:

- Mitchell North (Seymour, Puckapunyal, Tallarook, Trawool, Pyalong, Tooborac); and
- Mitchell South (Kilmore, Broadford, Wallan, Beveridge, Wandong/Heathcote Junction and Upper Plenty).

Please note that data was unavailable for population and age profile on a sub-regional level.

3.6.1. POPULATION

In 2015, the estimated population of Mitchell Shire was 39,581. Table 5 shows the historic and projected population of Mitchell Shire (Mitchell North and Mitchell South). Historic data was collected from the Australian Bureau of Statistics and future projections were taken from Victoria in Future.

Mitchell Shire has experienced consistent population growth in the south of the Shire. Approximately two thirds of Mitchell Shire's population is located in Mitchell South. Mitchell North experienced a decline in population from 2001 to 2006 and only grew by 0.2% from 2006 to 2011.

The overwhelming majority of population growth has occurred and is projected to occur in the southern part of Mitchell Shire. Major residential growth is occurring in Beveridge and Wallan with growth projected to continue within these areas.

Figure 16 shows the population of the Mitchell Shire sub-regions according to ABS (2011). There is an even distribution of population between the three sub regions. Wallan and Surrounds is the most populated (12,029), followed by Kilmore/Broadford (11,948) and Seymour and Surrounds (10,602).

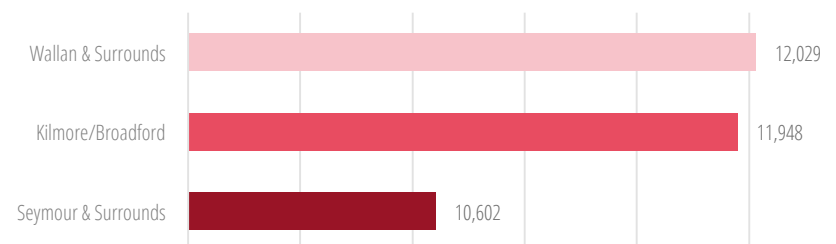
It's important to note that historical and projected population growth could not be provided for sub-regions, as the data areas were changed between Census dates. It can be assumed that the highest proportion of population growth is expected to occur in the growth areas of Wallan, Beveridge and Lockerbie as medium density residential allotments continue to be developed.

TABLE 5 POPULATION – MITCHELL SHIRE

	Mitchell North	Mitchell South	Total Mitchell Shire	Growth rate
2001	11,177	16,214	27,391	
2006	10,621	20,310	30,931	2.5%
2011	10,727	23,910	34,637	2.3%
2016*			40,732	3.3%
2021*			51,590	4.8%
2026*			67,864	5.6%
2031*			86,038	4.9%

Source: ABS, Census 2001/2006/2011, *Victoria in Future 2015

FIGURE 16 POPULATION- SUB-REGIONS



Source: ABS Census, population SA2 2011

3.6.2. AGE PROFILE

Table 6 shows the age profile of residents of Mitchell Shire in 2011. Mitchell South has a high proportion of children between the ages of 0 and 19, as well as a high proportion of residents between 35 and 49 years of age, highlighting that there are a large number of families in the Shire.

The age profile in Mitchell North is slightly older than Mitchell South with approximately 22.2% of the population over the age of 60, compared with Mitchell South (15.6%).

The data suggests that Mitchell North is experiencing below average population growth and the existing resident population is ageing. Whereas, Mitchell South is projected to experience strong population growth, generally families who are seeking affordable housing opportunities.

TABLE 6 AGE PROFILE

Age	Mitchell North	%	Mitchell South	%	Mitchell Shire	%
0-4 years	646	6.0%	1,756	7.3%	2,402	6.9%
5-9 years	681	6.3%	1,824	7.6%	2,505	7.2%
10-14 years	764	7.1%	1,948	8.1%	2,712	7.8%
15-19 years	806	7.5%	1,905	8.0%	2,711	7.8%
20-24 years	675	6.3%	1,358	5.7%	2,033	5.9%
25-29 years	565	5.3%	1,406	5.9%	1,971	5.7%
30-34 years	553	5.2%	1,371	5.7%	1,924	5.6%
35-39 years	644	6.0%	1,768	7.4%	2,412	7.0%
40-44 years	690	6.4%	1,950	8.2%	2,640	7.6%
45-49 years	793	7.4%	1,835	7.7%	2,628	7.6%
50-54 years	763	7.1%	1,701	7.1%	2,464	7.1%
55-59 years	776	7.2%	1,377	5.8%	2,153	6.2%
60-64 years	705	6.6%	1,292	5.4%	1,997	5.8%
65-69 years	519	4.8%	881	3.7%	1,400	4.0%
70-74 years	388	3.6%	596	2.5%	984	2.8%
75-79 years	325	3.0%	424	1.8%	749	2.2%
80-84 years	257	2.4%	276	1.2%	533	1.5%
85-89 years	122	1.1%	163	0.7%	285	0.8%
90-94 years	42	0.4%	61	0.3%	103	0.3%
95-99 years	10	0.1%	14	0.1%	24	0.1%
100 years and over	3	0.1%	4	0.1%	7	0.0%
Total employed	10,727		23,910		34,637	

Source: ABS Census, Age profile 2011

Table 7 shows the age projections for Mitchell Shire from 2011 to 2031. The age projections show that there will be an increase of approximately 125% from 2011 to 2031 in population under the age of 15, 166% increase in population within the retirement age bracket and approximately 102% increase in working age population.

TABLE 7 AGE PROJECTIONS

Age	2011	2016	2021	2026	2031
0-4 years	6.9%	7.3%	7.6%	7.7%	7.7%
5-9 years	7.2%	7.2%	7.6%	7.8%	7.8%
10-14 years	7.7%	7.2%	7.2%	7.4%	7.4%
15-19 years	7.8%	6.9%	6.5%	6.5%	6.6%
20-24 years	6.3%	6.4%	5.9%	5.7%	5.8%
25-29 years	6.0%	6.3%	6.4%	6.2%	6.2%
30-34 years	5.6%	6.3%	6.7%	6.8%	6.8%
35-39 years	6.9%	6.3%	6.9%	7.1%	7.2%
40-44 years	7.6%	6.9%	6.7%	7.0%	7.1%
45-49 years	7.5%	7.0%	6.5%	6.3%	6.5%
50-54 years	7.1%	6.9%	6.5%	6.1%	6.0%
55-59 years	6.2%	6.4%	6.1%	5.7%	5.5%
60-64 years	5.6%	5.5%	5.5%	5.3%	5.1%
65-69 years	4.0%	4.8%	4.6%	4.6%	4.5%
70-74 years	2.8%	3.4%	3.8%	3.7%	3.6%
75-79 years	2.1%	2.3%	2.6%	2.9%	2.8%
80-84 years	1.5%	1.5%	1.6%	1.8%	2.0%
85+	1.2%	1.3%	1.2%	1.3%	1.4%

Source: Forecast ID, Age profile projections 2015

4. BENCHMARKING

4.1. INTRODUCTION

The following section provides a review of Mitchell Shire's economic development opportunities in the context of surrounding LGAs including Hume, Whittlesea, Murrindindi, Strathbogie, Macedon Ranges and Greater Shepparton. This will provide an understanding of the following:

- Current resources dedicated to economic development and tourism in surrounding Councils;
- Key strategies and focus for economic development in the region;
- Key economic infrastructure in the region; and
- Opportunities for Mitchell Shire to leverage economic development outcomes.

This section will also assess the competitive advantages of Mitchell Shire, which contribute to the areas unique geographic location, infrastructure and access. The competitive advantages of the Shire can be utilised in the future for economic development opportunities

Figure 17 shows the location of the Local Government Areas surrounding Mitchell Shire.

4.2. BENCHMARKING - KEY FINDINGS

Mitchell Shire, similar to the Whittlesea and Hume LGAs, is expected to further experience significant population and housing growth.

Mitchell Shire is underrepresented in the Manufacturing industry compared to Hume and Whittlesea. There is an opportunity to further develop the Manufacturing industry in the Shire, particularly in food processing. Mitchell Shire has the lowest proportion of employees working in the Wholesale trade industry, presenting growth opportunities in the future.

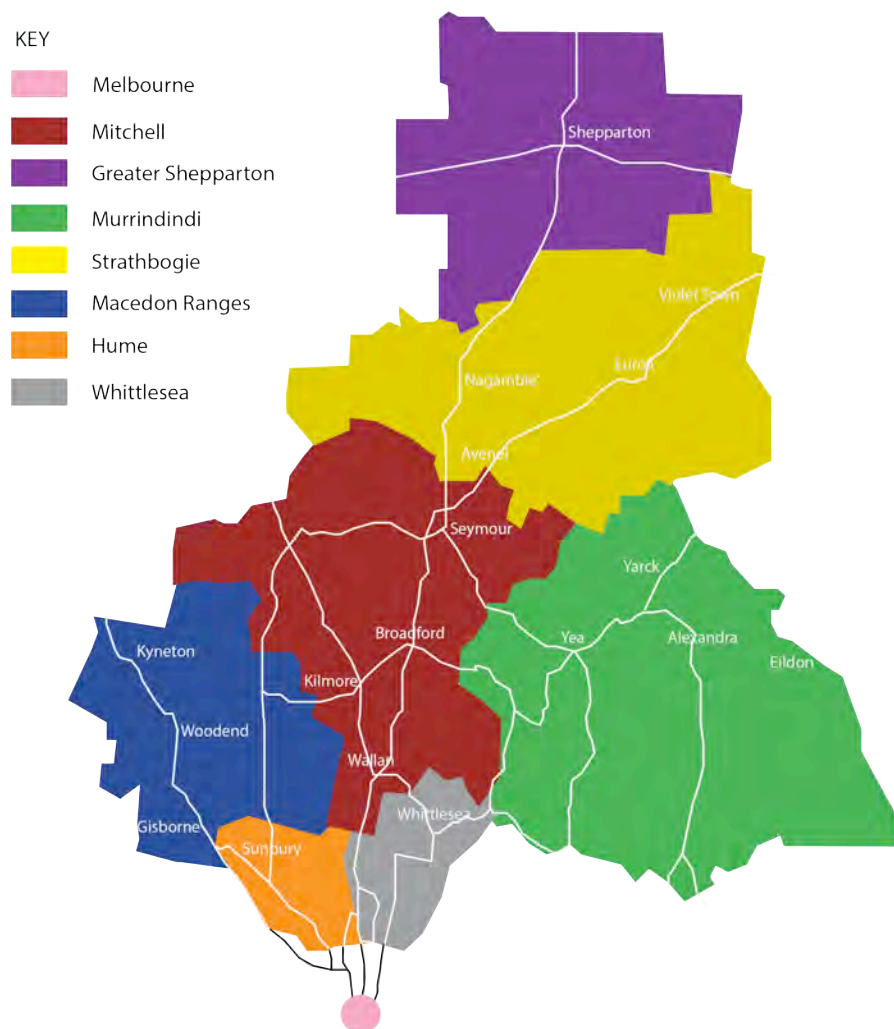
On average regional Shires have 4.5 staff within their economic development and tourism units, with an average budget of \$719 million. This is comparable to the resources dedicated in Mitchell Shire for economic development and tourism.

However other growth area and peri urban Council's such as Macedon Ranges and Hume City have far greater resources dedicated to economic development and tourism.

Macedon Ranges provides the strongest benchmarking comparison with Mitchell Shire, as it shares many similar characteristics including distance from Melbourne, strong transport links, dispersal of population across multiple townships and strong growth potential.

Mitchell is better placed than Murrindindi and Macedon Ranges to attract large industry. The reason for this is that both Macedon Ranges and Murrindindi both have high amenity areas and geography that will not support larger scale industry. In addition, Mitchell Shire has better connections to major destinations north such as Canberra, Sydney and Brisbane and is in closer proximity to Victoria's Goulburn Valley food bowl.

FIGURE 17 REGIONAL BENCHMARKING – CONTEXT MAP



Source: Urban Enterprise 2016

4.3. HISTORICAL AND PROJECTED GROWTH

Table 8 shows the historical and projected population growth for Mitchell Shire compared to surrounding Local Government Areas.

Mitchell, Hume and Whittlesea experienced the most significant population growth from 2001 to 2011 due to the provision of housing stock in growth areas. These growth areas will continue to develop into the future, and thus the three LGAs are projected to experience significant levels of population growth over the next 15 years.

Macedon Ranges and Greater Shepparton are projected to experience consistent population growth with growth rates varying between 1% and 2%.

TABLE 8 HISTORICAL AND PROJECTED POPULATION GROWTH

Population	2001	2006	2011	2016	2021	2026	2031
Mitchell	27,391	30,931	35,068	40,732	51,590	67,864	86,038
growth rate		2.5%	2.3%	3.3%	4.8%	5.6%	4.9%
Hume	131,182	147,781	174,291	199,220	228,244	258,924	292,301
growth rate		2.4%	3.4%	2.7%	2.8%	2.6%	2.5%
Whittlesea	113,784	124,647	160,800	200,894	239,306	279,318	316,919
growth rate		1.8%	5.2%	4.6%	3.6%	3.1%	2.6%
Murrindindi	13,060	13,672	13,324	13,713	14,372	15,127	16,161
growth rate		0.9%	-0.5%	0.6%	0.9%	1.0%	1.3%
Strathbogie	9,119	9,295	9,601	9,938	10,308	10,699	11,108
growth rate		0.4%	0.7%	0.7%	0.7%	0.8%	0.8%
Macedon Ranges	35,552	38,360	42,860	46,272	49,183	52,439	56,323
growth rate		1.5%	2.2%	1.5%	1.2%	1.3%	1.4%
Greater Shepparton	55,082	57,089	61,766	64,803	69,016	73,343	77,974
growth rate		0.7%	1.6%	1.0%	1.3%	1.2%	1.2%

Source: Victoria in Future 2015

4.4. EMPLOYMENT BY INDUSTRY

Table 9 shows the comparison in employment by industry between Local Government Areas. Employment by industry is generally comparable between all Local Government Areas. However, the Agriculture, forestry and fishing industry employs a higher proportion of employees in the northern Shires (Murrindindi and Strathbogie) compared to Hume and Whittlesea.

All LGAs have a high proportion of employees in the Construction, Retail trade and Health care and social assistance industries.

Hume has a high proportion of people employed in the Transport, postal & warehousing industry (10.1%). This can be attributed to Hume's proximity to Melbourne and major transport infrastructure (Hume Freeway, Melbourne Airport). There is an opportunity for Mitchell Shire to grow this industry, as Mitchell Shire is also located along significant transportation infrastructure and is a gateway to Northern Victoria, as well as Canberra, Sydney and Brisbane.

TABLE 9 EMPLOYMENT BY INDUSTRY

	Mitchell	Hume	Whittlesea	Murrindindi	Strathbogie	Macedon Ranges	Greater Shepparton
Agriculture, forestry & fishing	4.7%	0.3%	0.5%	16.1%	20.2%	4.8%	7.5%
Mining	0.6%	0.1%	0.1%	0.4%	0.3%	0.1%	0.1%
Manufacturing	7.6%	13.9%	14.2%	6.2%	8.8%	8.4%	12.6%
Electricity, gas, water & waste services	0.9%	1.0%	1.1%	1.0%	0.9%	0.5%	2.8%
Construction	8.3%	10.0%	10.5%	10.3%	8.0%	9.1%	6.5%
Wholesale trade	1.6%	4.5%	4.6%	2.6%	2.5%	3.0%	3.6%
Retail trade	11.4%	11.1%	12.2%	10.1%	8.4%	13.2%	13.0%
Accommodation & food services	7.7%	5.9%	5.2%	9.8%	6.0%	7.3%	4.7%
Transport, postal & warehousing	4.6%	10.1%	6.8%	2.6%	5.4%	3.0%	3.9%

Information media & telecommunications	0.6%	1.4%	1.6%	0.6%	0.8%	0.9%	1.2%
Financial & insurance services	1.0%	3.6%	3.8%	1.0%	1.4%	3.3%	1.9%
Rental, hiring & real estate services	1.2%	1.3%	1.2%	1.0%	0.8%	1.9%	0.9%
Professional, scientific & technical services	3.1%	4.3%	4.7%	2.7%	3.2%	5.8%	4.1%
Administrative & support services	2.1%	3.6%	3.4%	1.6%	2.3%	2.4%	2.2%
Public administration & safety	15.6%	5.5%	5.1%	7.5%	6.3%	5.7%	4.6%
Education and training	10.9%	6.0%	5.9%	10.8%	6.8%	10.9%	8.6%
Health care & social assistance	11.9%	9.2%	11.2%	10.4%	10.6%	11.7%	16.1%
Arts & recreation services	1.6%	1.2%	1.2%	1.9%	1.9%	2.8%	0.7%
Other services	3.5%	3.9%	3.8%	2.5%	2.9%	4.1%	4.1%
Inadequately described or not stated	1.1%	3.0%	2.8%	1.1%	2.5%	1.1%	1.0%
Total employed persons	9,585	70,929	71,495	4,115	4,155	10,614	25,034

Source: ABS Census, Employment by industry 2011

4.5. ECONOMIC DEVELOPMENT RESOURCES

Economic and tourism development resources and objectives vary between Local Government Areas based on a number of factors including, but not limited to the following:

- Economic infrastructure;
- Location and geographic context;
- Land use and availability;
- Workforce qualifications; and
- Dominant industries.

Table 10 shows the economic and tourism development resources for the comparative Local Government Areas, as well as existing economic development documents and strategies.

Over page are results from a recent Economic Development Australia benchmarking survey which included responses from 53 Local Governments in Victoria.

On average regional Shires have 4.5 staff within their economic development and tourism units, with an average budget of \$719,000. This is comparable to the resources dedicated in Mitchell Shire for economic development and tourism.

However other growth area and peri urban Council's such as Macedon Ranges and Hume City have more resources dedicated to economic and tourism development than Mitchell Shire.

TABLE 10 ECONOMIC AND TOURISM DEVELOPMENT RESOURCES

LGA	Economic Development Resources	Economic Development - Projects and Strategies	Tourism development Resources
Mitchell	- Economic Development Coordinator - Economic Development Officer - VIC officer (0.5 FTE)	- Seymour Structure Plan (Underway) - Economic Development Strategy (underway)	- Goulburn River Valley Tourism - Seymour Visitor Information Centre

Hume	- Economic Development Manager - Economic Development Officer(s) - Digital Economy Officer	- Economic Development Strategy - Broadmeadows Structure plan - Craigieburn Town Centre - Hume Integrated Land Use and transport Strategy - Tourism Strategy	- Sunbury Visitor Information Centre
Whittlesea	- Director - Governance and Economic Development - Economic Development and Organisational Planning Manager	- Community Plan - Council Plan - Tourism Strategy	- Whittlesea Tourism
Murrindindi	- Manager of Development Services	- Murrindindi 2030 - Economic Development Strategy	- Goulburn River Valley Tourism
Strathbogrie	- Director of Sustainable Management - Economic Development Officer	- Economic Development Masterplan - Euroa Structure Plan - Sustainable Land Use Study - Violet Town and District Strategic Development Plan - Avenel 2030	- Goulburn River Valley Tourism - Nagambie Visitor Information Centre
Macedon Ranges	- Economic Development and Tourism Manager - Economic Development Coordinator - Tourism Coordinator - Economic Development Officer - Tourism Coordinator	- Economic Development Strategy - Tourism Industry Strategic Plan - Equine Industry Strategy - Events Strategy - Business Centre Feasibility Study - Agribusiness Plan - Kyneton Airfield Economic Opportunities Analysis - Kyneton Saleyards Strategic Plan	- Daylesford and Macedon Ranges Regional Tourism - Macedon Ranges Tourism - Woodend Visitor Information Centre - Kyneton Visitor Information Centre
Greater Shepparton	- Director Sustainable Development - Economic Development Manager - Economic Development Officer	- 2030 Strategy - Economic Development Strategy (underway) - Council Plan	- Goulburn River Valley Tourism - Shepparton Visitor Information Centre

Source: Mitchell Shire Council website, Hume City Council website, Whittlesea City Council website, Strathbogrie Shire Council website, Murrindindi Shire Council website, Macedon Ranges Shire council and Greater Shepparton Shire Council

4.5.1. EDA BENCHMARKING STUDY

STAFF

On average, Regional Cities currently dedicate the highest number of staff (EFT) to economic development and tourism services with an average of 5.9 staff. This is closely followed by Metropolitan Melbourne LGAs with 5.6 staff and Regional Shires with 4.5 staff.

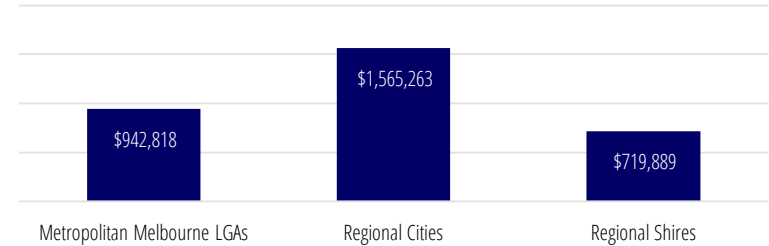
TABLE 11 AVERAGE NUMBER OF ECONOMIC DEVELOPMENT STAFF – VICTORIAN LGAs

	Metropolitan Melbourne LGAs	Regional Cities	Regional Shires
Staff dedicated to economic development and tourism services within your Local Government	5.6	5.9	4.5

BUDGET

Regional Cities allocate the highest amount of funding towards economic development and tourism services with an average of approximately \$1.5 million. Metropolitan LGAs allocate approximately \$950,000 and Regional Shires, \$720,000.

TABLE 12 AVERAGE BUDGET ALLOCATION



Source: Urban Enterprise 2016

4.6. COMPETITIVE ANALYSIS

Mitchell Shire competes with peri urban and growth area Council's to Melbourne's north for resident and industry attraction.

Whilst currently most investment is being funnelled into the growth areas of Hume and Whittlesea, Mitchell over time will play an expanded role in absorbing population and industry growth.

Surrounding peri-urban Councils such as Macedon Ranges and Murrindindi have larger concentrations of high amenity landscapes, forest and undulating topography that are less suited to cater for larger industry.

Mitchell Shire has a strong competitive advantage over its neighbouring peri-urban areas with respect to its ability to capture larger industry, with strong transport links, proximity to Melbourne's wholesale market and the Goulburn Valley. Zoning of strategic sites to accommodate this opportunity, however may be required.

5. BUSINESS SURVEY

5.1. INTRODUCTION

The following section provides a summary of the key results from the Mitchell Shire Economic Development Business Survey. Urban Enterprise developed an online survey which was distributed to every business registered with an Australian Business Number in Mitchell Shire. The aim of the survey is to understand existing businesses in the Shire in respect of the following:

- Proportion of home based businesses;
- Reason for being a home based business;
- Number of employees;
- Opportunities and barriers to business growth in the Shire;
- Estimated change in turnover for past financial years;
- Expected change in turnover for future financial years;
- Plans to expand business operations;
- Gaps in local products and services; and
- Marketing and advertising tools.

The business survey received a total of 109 responses. A summary of key findings is presented in this section. A complete summary of the business survey results can be found in Appendix A.

5.2. BUSINESS SURVEY - KEY FINDINGS

A business survey was developed and distributed to all registered businesses in Mitchell Shire as part of this project. The survey received 109 responses. The business survey results show that over half of the respondents are home based businesses. This is due to the high proportion of new and relatively new businesses that are in the Shire.

There has been growth in business income (turnover) and employment in the previous financial years and this is expected to continue.

There is a shortfall in business services and facilities in the Shire, which has resulted in businesses travelling outside the Shire for these services, notably Metropolitan Melbourne.

Businesses in Mitchell Shire generally utilise online tools to promote their business, either via social media, own website or an online directory tool.

Businesses in the Shire are in support of businesses development opportunities including training resources in areas such as digital marketing, financial management and business planning.

Key areas for the Economic Development Strategy to consider include business networking, training and engagement. It will be important for Mitchell Shire to put in place ways to engage the business sector more readily and ensure this is maintained over time.

5.3. SUMMARY OF KEY RESULTS

The following shows the key results from the Mitchell Shire Business Survey.

HOME-BASED BUSINESSES

The Mitchell Shire business survey revealed that approximately 56% of business in the Shire are based at their home or residence. The main reasons for businesses utilising their home as a business premises includes:

1. Flexible working hours (30%);
2. Low costs (23%);
3. Other (18%);
4. Business not ready to stand alone (18%);
5. Less travel (13%);
6. Family responsibilities (12%); and
7. Lack of available or appropriate premises (4%).

18% of home based businesses stated that their business is not ready to stand alone, thus it is not viable for them to move out of their residence. This response highlights that there is a high proportion of new businesses in the Shire.

Respondents were prompted to rate the level of benefit of specific facilities and services, which are a resultant of working from home-based premises. The results include the following:

- 44% of home based businesses responded that a high benefit of having a residence based business is high speed internet.
- 46% of home based businesses responded that a high benefit of having a residence based business is quality mobile connectivity.
- Business networking within a home based business is of high benefit (15%), benefit (10%) and some benefit (14%).

- 17% of home based businesses responded that a high benefit of having a home based business is professional development and training.

EMPLOYMENT

The survey reveals that there has been a growth in jobs in the 2015 financial year in Mitchell Shire. On average, there were approximately 12 people employed per business as at July 2014 and that increased to 14 as at June 2015.

GROSS BUSINESS INCOME (TURNOVER)

Respondents were prompted to estimate the change in their gross business income (turnover) for the 2014/2015 financial year when compared with the 2013/2014 financial year. The following results were concluded:

- No change (28%);
- Increase by 11% - 20% (16%);
- Increase by 1% - 10% (14%);
- Increase by 31% or higher (13%);
- Increase by 21% - 30% (10%);
- Decrease by 1% - 10% (5%);
- Decrease by 11% - 20% (5%);
- Decrease by 21% - 30% (4%); and
- Decrease by 31% or higher (2%).

The majority of businesses responded that they experienced a positive change in gross business income between the 2014 and the 2015 financial years.

Businesses were then prompted to state whether they expect their gross business income to increase, stay the same or decrease from the 2015 to 2016 financial years. A high proportion of businesses (60%) stated that they expect their gross business income to increase, whilst 28% expect it to stay the same and 9% expect a decrease.

Furthermore, 47% of respondents are planning to expand their business in the next 12 months. These results highlight that businesses are experiencing and are expecting to experience business growth.

Businesses were asked to provide the area in which the highest proportion of their business income is generated from. The results include:

1. Mitchell Shire (40%);
2. Metropolitan Melbourne (28%);
3. Country Victoria (17%);
4. Interstate (7%);
5. Online (7%); and
6. International (1%).

A high proportion of businesses generate their business income from within Mitchell Shire. However, the results show that Metropolitan Melbourne and Country Victoria are an important contributor to business income in Mitchell Shire.

The business income generated from outside of the Shire can have positive effects, which originate from the transportation links that are existing in the Shire.

PRODUCTS AND SERVICES

Business respondents were prompted to identify the area in which their business accessed their product and services. The results include:

1. Metropolitan Melbourne (35%);
2. Mitchell Shire (29%);
3. Online (12%);
4. Country Victoria (12%);
5. Interstate (6%); and
6. International (3%).

A high proportion of businesses access their products and services from Metropolitan Melbourne, which shows that Mitchell Shire is losing supply chain expenditure to surrounding Local Government Areas, notably to the south of the Shire.

Respondents were prompted to provide reasons why they do not use suppliers within Mitchell Shire and the following results were provided.

1. Not available (52%);
2. No answer (19%);
3. Not cost effective (19%);
4. Not known (9%);
5. Other (8%); and
6. Not reliable (6%).

Over half of the respondents (52%) stated that suppliers of products and services required for their business operations aren't available in Mitchell Shire, thus have to seek them from other areas such as Metropolitan Melbourne.

BUSINESS DEVELOPMENT

The following results show the media platforms utilised to promote businesses in Mitchell Shire. Social media is the most utilised media platform for business promotion (51%), followed by own website (40%) and online business directory (25%).

1. Social media (51%);
2. Your own website (40%);
3. Online business directory (25%);
4. No promotion (21%);
5. Other (20%);
6. Local newspapers (17%);
7. Email marketing (17%);
8. Media outside the region (10%);

9. Local radio (6%); and
10. Community newsletter (3%).

Business respondents were prompted to provide business development opportunities that would be ideal for their business. The top responses included:

1. Marketing;
2. Business planning;
3. Financial management; and
4. Online tools.

Business respondents have expressed that these are the areas which require training and will help business development in the Shire.

The ideal avenue for business training, according to responses, is online. However, during business hours, specifically in the morning on weekdays would be an ideal time for business training workshops.

6. COMMUNITY SURVEY

6.1. INTRODUCTION

The following section provides a summary of the key results from the Mitchell Shire Economic Development Community Survey. The survey was distributed to the Mitchell Shire community. The aim of the survey was to understand the following:

- Residents' occupation;
- Reasons Mitchell Shire is an attractive place to live;
- Suggestions to improve the attractiveness of Mitchell as a place to live;
- Key issues facing the community;
- Priority economic development initiatives;
- Potential priority infrastructure projects; and
- Gaps in the retail offer.

The community survey received a total of 186 responses. A summary of key findings is presented in this section.

6.2. COMMUNITY SURVEY - KEY FINDINGS

A community survey was developed and distributed to the Mitchell Shire community as part of this project. The survey received 186 responses.

The community survey identifies community priorities for Mitchell Shire in terms of attracting residents, businesses and promoting growth in jobs.

The major areas of focus for attracting resident and improving Mitchell Shire townships include improving amenities, improving and upgrading townships streetscapes, increasing the connectivity within the Shire, support new business and industry and improve public services including education, health care and public transport.

Priority infrastructure projects include:

- Streetscape upgrades;
- Revitalise heritage buildings and assets;
- Riverside precinct in Seymour;
- Improve condition of roads and increase the provision of pedestrian and bicycle links within and between townships;
- Education institutions; and
- Business hubs/incubators.

6.3. SUMMARY OF KEY RESULTS

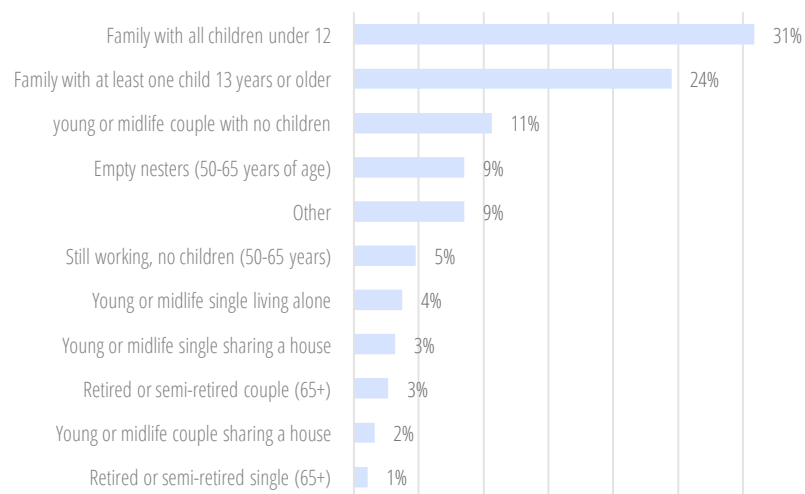
The following shows the key results from the Mitchell Shire Community Survey.

PROFILE OF RESPONDENTS

Of the 186 respondents, 77% live in Mitchell Shire. The respondents originate from the following areas:

- Wallan (33%);
- Seymour (24%);
- Kilmore (19%);
- Other (12%);
- Broadford (8%);
- Beveridge (2%); and
- Tallarook (2%).

FIGURE 18 HOUSEHOLD TYPE



ATTRACTIVE PLACE TO LIVE

77% of respondents stated that they like living in the Mitchell Shire, 8% stated they did not like living in Mitchell Shire, whilst 13% of respondents were unsure.

Respondents stated that the major factors contributing to Mitchell Shire's liveability include the following:

- Country living;
- Resilient community;
- Central location (close to major regional centres and Melbourne); and
- The natural environment.

The following suggestions were provided to make Mitchell Shire a more attractive place to live:

- Improve the access to public services
 - Health care employment services
- Improve amenities for youth
 - Parks and playgrounds
 - Public swimming pool
 - Entertainment
- Community development
 - Upgrade to parks
 - Community activities and events
- Council operations and services
 - More community engagements and consultation
 - More efficient waster services
- Economic development
 - Business and employment growth
 - Housing and population growth
 - Increase job containment rate
 - Support small businesses

- Support new and existing businesses
- Attract new, larger businesses
- Arts and culture presence (e.g. museum)
- Vibrant and active town centres
- Strategic planning
 - Streetscape improvements and upgrades to town centres and main streets
 - Greater housing mix (varying lot sizes)
- Education
 - Invest in existing schools (infrastructure, resources)
- Public transport
 - More regularity of train services
 - More efficient connection between town centre and train station
 - Greater connectivity between townships
- Retail
 - Greater variety of retailers
 - Attract larger retailers to major townships (Kmart, Big W)
 - Require local produce stores (e.g. butchers, fruit and vegetables)
 - Greater variety of cafes and restaurants

PRIORITY INFRASTRUCTURE PROJECTS

Respondents provided the priority infrastructure projects that are required for Mitchell Shire:

Seymour

- Cinema
- New Visitor Information Centre
- Entertainment facilities
- Revitalise and restore the Goulburn Bridge

- Riverside precinct

Kilmore

- Town centre streetscape improvements and upgrades
- Kilmore bypass
- Greater connectivity within township (pedestrian, bicycle links)
- Invest in iconic heritage buildings
- Road conditions

Broadford

- Road maintenance and improvement

Wallan

- Higher quality food and beverage offer
- Business hub/incubator
- Education institutions
- Leisure centre
- Retail

RETAIL

A proportion of the respondent's state that they travel outside of Mitchell Shire for certain retail needs. Residents in Mitchell South generally travel to Craigieburn, Epping, Greensborough and Broadmeadows due to the increased availability and greater range of retail items including apparel, homewares, leisure, bulky goods and retail services.

Residents of Seymour generally travel to Shepparton for higher order retail needs.

Additional retailers required include:

- Local produce and grocers (e.g. butcher, fruit and vegetables, delicatessen)
- Apparel
- Technology
- Sporting goods

- Cafes and restaurants
- Gastronomic pub
- Larger retailers (Bunnings, Kmart, Big W)

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7. ISSUES AND OPPORTUNITIES

7.1. INTRODUCTION

The following section provides an overview of the overarching issues and opportunities for economic development within Mitchell Shire. The issues and opportunities have been developed from in-region consultation undertaken within the townships of Wallan, Kilmore, Broadford and Seymour and a broader assessment of the economic opportunities. A detailed consultation summary can be found in Appendix B. Please note that issues and opportunities are presented in a sub-regional format.

7.2. ISSUES AND OPPORTUNITIES - KEY FINDINGS

MITCHELL SHIRE WIDE

Mitchell Shire is well located to attract both residential and employment growth, particularly in the Mitchell South Growth Areas. This is supported by metropolitan planning which includes parts of Southern Mitchell within Melbourne's growth area.

Mitchell Shire's key existing propulsive industries include Public Administration and Safety (Defence - Puckapunyal Army Base), Manufacturing (Sugar and Confectionary - Nestle), Construction, Transport, postal and warehousing, Agriculture and Health care. There is an opportunity to further capitalise on emerging industries in the Shire which include Health Care, Education, Transport and Accommodation and food services.

A key outcome of consultation identified the need for Council to better engage and support the business sector. Initiatives which should be considered include newsletters to Council's business database, networking sessions, development of a Mitchell wide advisory group, and training sessions.

In addition to the specific initiatives identified for townships, Mitchell Shire should consider how to grow productivity in the rural areas. This includes looking at how value adding, horticulture, equine and tourism can be accommodated.

SEYMOUR AND SURROUNDS

Seymour has a number of competitive advantages including its location, which is positioned in close proximity to major transport infrastructure including the Hume freeway, Goulburn Valley Highway, Melbourne Airport and the Port of Melbourne metropolitan

Seymour is well positioned to leverage off the Goulburn Valley Food bowl in the north of Victoria, as well as access to Melbourne's CBD and port via the Hume Freeway and regular train services. These attributes would be ideal for certain industries to locate to Seymour including Transport, postal and warehousing businesses, distribution and food processing. Targeting growth in these industries aligns with the Shire's propulsive industries and capitalises on the regions competitive strengths.

Seymour and Surrounds has the opportunity to grow the industries of tourism, agriculture and food processing, equine, transport, postal and warehousing and education and training. These industries are well supported by the existing strengths of the region including the Goulburn River, high quality agricultural land (along Goulburn flats), access to transport, geographic location, land availability and affordability.

KILMORE/BROADFORD

Kilmore and Broadford are attractive for tree change residents who seek to live on larger allotments in a semi-rural setting. Kilmore/Broadford has transport links to Melbourne via Hume Freeway and train services.

Kilmore and Broadford are well provided for in terms of education and health services and there is opportunity to expand these sectors in the future. Kilmore is an ideal location for a tertiary institution to have a presence in the region as there are synergies between the primary and secondary schools in the region, as well as competitive regional strengths including equine, agriculture and sport and recreation.

The Kilmore/Broadford sub region has the opportunity to grow a number of industries including retail trade, professional, scientific and technical services, financial and insurance services, agriculture and food processing, equine, health and social assistance and education and training.

WALLAN AND SURROUNDS

Wallan and Surrounds is experiencing significant population and housing growth following the sub region's partial inclusion within the Urban Growth Boundary. Wallan and Surrounds is expected to experience a level of organic employment and industry growth, which will naturally grow industries including Construction, Education, health Care and Retail trade as the demand for these industries increases.

Wallan is an appealing area for families and businesses looking for affordable living and working options due to the land availability in the sub-region. Residential housing supply is expected to increase as the population growth increases demand for residential properties.

Wallan and Surrounds is in close proximity to naturally significant areas such as Kinglake Ranges, Mount Disappointment, Whittlesea Ranges, Blair's Hut, Tallarook Ranges and Hanging Rock. There are also a number of pedestrian and bicycle trail networks, which make it an ideal location for recreation.

7.3. MITCHELL SHIRE WIDE

This section provides an overview of issues and opportunities relevant to Mitchell Shire as a whole and also Mitchell Shire Council. Potential council services could be offered to new and existing businesses to promote economic growth in the Shire.

BUSINESS SUPPORT SERVICES

Mitchell Shire Council has the opportunity to provide information, training and support services to new and existing businesses across the Shire to attract new industries, as well as increasing performance for existing businesses.

Council could support the the following support services:

- Education and training – May include social media or digital marketing training or financial and administrative training.
- Financial assistance – Potential to provide rate subsidies for new businesses
- New Enterprise Incentive Scheme (NEIS) - Provides training and business set-up mentoring assistance for new businesses in the Shire.
- Networking events – Although it would need to be driven by businesses, Council could provide the early stages for setting up networking events for local businesses.
- Ongoing engagement and information to be provided to businesses.

There is opportunity for Mitchell Shire to partner with Hume City Council and also Strathbogie Shire to provide these services to businesses. Hume City Council in particular has well developed programs which Mitchell Shire can leverage from.

BUSINESS COMMUNICATION AND ENGAGEMENT

Discussions with many businesses highlight in the past there has been limited relationships built between businesses and Mitchell Shire Council.

This is also affected by turnover of Council staff and the lack of systems in place which ensure that relationships between Council and business are maintained with turnover of staff.

There is an opportunity to create and maintain an ongoing relationship with businesses in the Shire, email provides the easiest avenue. Until the development of the Economic Development Strategy, Council has not had a database of active businesses in the Shire in which to communicate with directly.

Mitchell Shire should continue to develop a quality business database in order to maintain effective relationships and communications with businesses.

PLANNING CONTROLS AND PROCESSES

Anecdotally, businesses have difficulties in understanding the complex nature of the Planning Scheme. Planning processes can be a major deterrent for new businesses as they can become frustrated applying for permits. There is an opportunity for Council to provide facilitative services to new and existing businesses in the Shire to help them overcome planning barriers such as planning compliances.

In other Councils, economic development personnel play a key role in facilitating discussions between planners and businesses and assist businesses in navigating the planning process.

COMPARATIVE ADVANTAGE TO SUPPORT LARGER INDUSTRY

Mitchell Shire is well placed to attract larger industry uses such as manufacturing, transport and distribution compared to neighbouring peri-urban areas such as Macedon Ranges and Murrindindi Shire. This means that industrial growth opportunities that may flow from Hume and Whittlesea may be accommodated in Mitchell Shire due to its strong transport links and proximity to the Goulburn Valley.

Further investigation of locations for super-lot strategic sites should be investigated in Mitchell Shire.

AGRICULTURE AND RURAL LAND USE

STRENGTHEN THE RURAL ECONOMY

Data from the ABS highlights a very low level of economic value attributed to agriculture in Mitchell Shire compared with other similar sized LGAs in Victoria.

This reflects the predominant use of rural areas for broad hectare farming and low levels of intensive agriculture and value adding.

Council should look to diversifying the economic value of the rural areas through supporting higher intensive agricultural activity such as horticulture, on-site value adding, agri-tourism and equine.

A planning study may be required to support this diversification of rural uses, given the restrictions that exist in the Farming Zone.

HOBBY FARMING AND BOUTIQUE INDUSTRY

The increase in rural lifestyle and hobby farmers in the Shire, particularly Kilmore/Broadford and Seymour and Surrounds is resulting in an increase in alternative farming operations such as food processing, permaculture and viticulture.

There is an opportunity to provide an educational tool kit for hobby farmer residents to help understand certain agricultural processes and provide positive reinforcement.

RATES ON AGRICULTURE LAND

The majority of land parcels in the Shire are smaller than further North in Victoria. It is common for farmers in the Shire to have numerous land holdings. The owners are required to pay multiple property rates. There is an opportunity for Mitchell Shire Council to reconsider the calculation of property rates for farmers with numerous land holdings. Subsidised property rates for farmers with numerous land parcels would provide an incentive to continue their agricultural operations.

RESOURCES

A review of Council's resources for economic development should be considered upon completion of the Economic Development Strategy in order to direct effort where it provides the greatest opportunity to grow the economy.

Specifically, for consideration is:

- Resources and costs associated with visitor servicing and how best to meet visitor need;
- The number and roles of economic development personnel to effectively deliver the strategy;
- Relationships with regional tourism organisations.

JOB CONTAINMENT

Mitchell Shire has a job containment rate of approximately 49%. Due to the commutability of Mitchell Shire, particularly in Mitchell South, there is a threat that the job containment rate could fall even lower, as people who live in the Shire commute to the other areas including Hume, Whittlesea and Melbourne for employment opportunities.

Mitchell Shire should aim at increasing the job containment rate by encouraging new industries and businesses to relocate to Mitchell Shire.

TABLE 13 SWOT ANALYSIS – MITCHELL SHIRE WIDE

Strengths	Weaknesses	Opportunities	Threats
Strong population and housing growth – Mitchell South	Shortage of skilled and qualified workers	Business support services – Education and training, financial assistance, networking events, new business schemes.	Climate change – Threat of more regular extreme weather events (fire, drought)
Transport Infrastructure - Access to Hume Freeway, train services, Melbourne Airport and Port of Melbourne	Lower proportion of economic development resources compared to surrounding LGAs	Business communication an engagement	Residential encroachment on agricultural land - Land degradation and change of land use – Mitchell South
Land availability and affordability	Competing with other major employment areas including Hume and Whittlesea	Facilitate businesses in overcoming planning barriers by providing information and advice	Job containment could decrease due to the increased commutability and business and industry development occurring in Hume and Whittlesea LGAs
Lifestyle and resident attraction - Suburban living in a rural setting	Agricultural land can be unproductive	Strengthen the rural economy	
Nature-based attributes – Goulburn River, Tallarook Ranges, Trawool Valley	Losing a proportion of retail expenditure to larger retail centres including Epping, Craigieburn and South Morang	Business attraction - Comparative advantages to attract larger industry to the Shire	
Key propulsive industries – Public Administration and Safety (Puckapunyal), Construction, Manufacturing (Nestle) and Transport	High staff turnover – Mitchell Shire Council	Educational tool kit for new hobby farmers – May provide incentive for hobby farmers to move to the Shire.	
Strong agricultural presence	Infrastructure shortfalls – Ready to use commercial office space, industrial warehouses/centres	Grow emerging industries including Transport, Education, Health Care, Construction, Accommodation and food services	
Resilient communities in Mitchell townships		Tourism opportunities in Seymour and Surrounds and Kilmore/Broadford	
		Diversify industries – Target growth in medium propulsive industries through consultation, investment attraction and innovation – Industries include Professional and Financial services, Retail trade, Real Estate, Nurture the rural economy as it incorporates a larger number of value-add, alternative farming businesses	

7.4. SEYMOUR AND SURROUNDS

The following section provides a summary of opportunities for economic development in the Seymour and Surrounds region, as well as existing issues and barriers to economic development in the region.

TRANSPORT INFRASTRUCTURE

Seymour is well serviced in respect of road and public transport infrastructure. The rail line travels directly through the town centre to Melbourne's CBD. Regular train services during peak times allows commutability to and from the township. Melbourne CBD is approximately 1 hour 20 minutes via train.

The Hume Freeway and Goulburn Valley Highway connect Seymour with Metropolitan Melbourne, as well as some of the larger regional centres including Shepparton and Wangaratta. The accessible transport links provide ease of access for commuters to travel to and from the town.

The transport infrastructure for Seymour is a competitive strength of the town and attracts many regional residents to Seymour to use the transport services.

RESIDENT ATTRACTION

Seymour is an ideal location for attracting tree change residents and retirees. The town is well provided for in terms of public services including health and aged care, community, education and sport and recreation facilities.

Although there is ample supply of residential land, there is a need for Seymour to provide a diverse range of housing stock to attract new resident and separate itself from medium density housing growth that is occurring Mitchell South. The provision of lifestyle allotments (5-10 acres) will attract the retiree, tree change and hobby farmer markets to Seymour.

There is an opportunity to provide retirement housing options that cater for the ageing demographic of Seymour.

INDUSTRIAL LAND SUPPLY

An economic background report prepared by Spade Consultants suggests that there is ample industrial land supply in Seymour to accommodate incremental growth. The report identifies 33.3 hectares of available land within Industrial 1 Zone. Based on the historical average take up of industrial land in Seymour (0.5 hectares p.a.), it is assumed that the current supply of industrial land can satisfy approximately 67 years of demand.

Much of the industrial land in Seymour is currently underutilised. However, the adequacy of the supply of industrial land requires further assessment. There is no guarantee that the current supply of industrial land can be delivered to market. A proportion of the current supply of industrial land requires property development including the introduction of services in order to bring it to a useable quality, however the current provision of land presents future opportunities to attract larger industries to the area.

There is a current gap in purpose designed industrial buildings in Seymour. The provision of attractive and useable industrial floor space such as warehouses, factories and distribution centres would help attract new businesses into Seymour.

A number of larger businesses (Ralphs Meats, Nestle) have relocated from metropolitan Melbourne to Mitchell Shire due to the land availability, affordability and the access to the Hume Freeway.

In addition to the current land supply Seymour would benefit from the identification of industrial superlots to accommodate potential large scale industrial uses. The identification of future industrial sites should consider the development of roads, services and interchanges.

STAGNANT GROWTH

Seymour is experiencing below state average growth for population and housing. Wallan and Kilmore are experiencing above average growth in the southern portion of the Shire, thus are experiencing more natural employment and industry growth. There is a need for Seymour to grow the resident population base in order to experience growth in existing and emerging industries.

The age profile of Seymour suggests that the resident population is getting older. A barrier to economic growth in the region can be attributed to the proportionate population exiting the workforce and entering retirement. There is a need to attract new, younger age profiles into the region.

MANGALORE AIRPORT AND MOORABIN FLIGHT TRAINING ACADEMY

Mangalore airport is located 20 kilometres north of Seymour township and is primarily an airport designed for training pilots. Although Mangalore is located in the southern portion of Strathbogie Shire, a large proportion of the economic benefit generated from the airports' operations is realised in Seymour. The Moorabin Flight Training Academy (MFTA) relocated to Mangalore in 2006 to accommodate Chinese pilot cadets who are in training for commercial Chinese airlines. There are approximately 110 Chinese cadets in the training academy with groups of 20 students turned over every 65 weeks.

The cadets rent residential properties in Seymour and are given a food allowance by the training academy, which is predominantly spent in the town.

There are current restrictions on the amount of cadets the academy can accommodate due to the limited nature of the Airport and training resources. However, if the infrastructure of the Airport was to develop over time, there is a major opportunity for the growth of the academy to produce a greater economic benefit for Seymour.

Other long term opportunities for Mangalore include:

- Freight (exporting fresh produce to international markets); and
- Other air services (in proportion with the expansion of Essendon and Moorabbin airports).

SOCIO-ECONOMIC PROFILE

In August 1999, a Jesuit Social Services study called *'Unequal in Life'* was released, which identified Seymour as the 10th most disadvantaged postcode in Victoria. The indicators of disadvantage for this study were: unemployment, low income, low birth weight, child abuse, school leavers less than 15 years old, emergency assistance, psychiatric hospital admissions, court convictions, child injuries, unskilled workers and court defendants.

Consulting with some of the larger businesses within Seymour suggested that a major issue in growing the workforce and increasing the number of local people employed in Seymour is the low socio-economic profile of a proportion of the resident population. The proportion of social housing, paired with the low socio economic background of residents presents challenges in providing a workforce suited to local industry.

Some of the larger businesses in Seymour employ people from outside of Seymour in areas such as Shepparton, Nagambie and Kilmore because attracting quality staff from Seymour was an issue, particularly for jobs that do not require tertiary qualifications.

PUBLIC SECTOR RELIANCE

The major employing sector in Seymour and Surrounds is the public sector. Public Administration and Safety, Health and Social Assistance and Education are the major employing industries in the region. This is the result of Puckapunyal Army Barracks, Seymour Hospital and Schools being located in and in proximity to Seymour.

Growing private sector business in Seymour should be an objective in order to grow the economy, this includes development of existing businesses and attracting new private industry.

A vibrant economy is dependent on attracting and developing a private industry.

BUSINESS HUB/INCUBATOR

Consulting with small businesses and the community within Seymour, there is a need to develop a business hub/incubator, which provides a mixture of temporary and permanent office space for new businesses, home based businesses and community groups. The hub/incubator would offer a facility to businesses where they can conduct business activities that generally cannot be carried out at their current location.

Further assessment is required to identify potential sites, as well as the scale and capacity of the business hub. The business hub/incubator could include meeting rooms, hot desks and an availability of telecommunication services such as internet. Poor internet connection and slow speed were suggested as a barrier to small business growth within the region, particularly to home-based and start-up businesses.

EDUCATION AND TRAINING

Seymour has a number of educational institutions including two primary schools, a public secondary school and catholic secondary school (up to year ten). Anecdotally, Seymour College is in need of an upgrade of campus facilities.

There is also a TAFE (GOTAFE) located in Seymour. There is an opportunity to grow the Education and training sector in Seymour and encourage a relationship between finishing secondary and tertiary education and entering the workforce.

If the education system is expanded and improved in the township, it would present opportunities to attract new residents, particularly younger families to the area. There is a need to change the culture surrounding education in the town and improve the relationship that the youth have with the education system.

There is a major opportunity in Seymour to utilise the township's existing infrastructure, advantageous geographical location and proximity to environmentally significant areas and nature based assets for education purposes. The following areas could be explored for further educational aspects, leveraging off Seymour's environment, infrastructure and geographic location:

- Aquaculture (Goulburn River);
- Agriculture;
- Viticulture;
- Horticulture;
- Indigenous history and heritage;
- Equine;
- Automotive training (Automotive Training Centre);
- Sustainable and alternative farming; and
- The Moorabin Flight Training Academy (MFTA).

RETAIL TRADE

Seymour is well serviced in terms of retail trade and retail services and benefits from surrounding townships. Seymour's retail catchment extends outside of the township to surrounding areas, which include Puckapunyal, Tallarook, Avenel, Yea, Euro and Nagambie. The resident population of these surrounding towns visit Seymour for higher order retail needs.

Seymour's retail offers a greater variety for shoppers. Seymour includes three supermarkets (Coles, Woolworths, Aldi), five car dealerships, as well as a Country Target. Retail services include Vic Roads, Centrelink, automotive and tyre services

Seymour also provides clothing and apparel, timber and hardware, agriculture and homeware retail options, which are generally not provided in the surrounding townships.

The retail offer in Seymour plays an important role in servicing surrounding areas. According to Victoria in Future's population projections, Strathbogie Shire's population is expected to increase by approximately 1,200 people over the next 15 years. The increase in population in Strathbogie Shire will result in an increase in retail expenditure for trade and services as Seymour continues to capture residents from the surrounding townships for high retail needs.

There is an opportunity to continue to attract larger retailers to further capture the retail expenditure from the surrounding regions.

EQUINE

THOROUGHBRED RACING AND TRAINING

Seymour is a hub for thoroughbred racing and training. The Seymour Racetrack is a thoroughbred training hub for some major studs in the North East region and is currently undergoing a \$5.5 million track widening upgrade. There are approximately 35 trainers utilising the facilities at Seymour and training a total of 100 horses. The current facilities could accommodate up to 175 horses, highlighting the potential future growth in the industry.

The Seymour equine hub is concentrated to the west of the township, on the outskirts of the town. This is an ideal location as it is kept separate from residential and commercial uses and allows ample land supply for trainers.

The equine presence in Seymour has the potential to grow synergy industries such as stockfeed and supplies, farriers and veterinarians.

There has been residential development occurring to the west of the racecourse along Kobyboyn Road, which accommodates demand for equine/rural lifestyle allotments. The rural living allotment are attracting small trainers to the region. There may be a longer term requirement to provide larger allotments to attract medium size trainers to the region.

RECREATIONAL EQUINE

Seymour is an ideal location to become a major equine hub in the North East due to the existing equine strengths in the area, land availability, location and ease of access.

Mitchell Shire has a strong recreational equine presence. Seymour provides strong opportunity to establish an indoor arena and equestrian facility to attract recreational equine users to the township through training and events.

AGRICULTURE AND FOOD PROCESSING

Agriculture is an important contributor to the Shire's economy, particularly in Seymour and Surrounds. There are a number of commercial broadacre farming operations in the region, which generally farm cattle and sheep.

There are an increasing number of smaller alternative farming operations occurring in the region, which concentrate on value add, intensive farming uses. This is an increasing trend in the region due to the increasing number of smaller parcels of land and increased number of hobby farmers in the Shire.

Smaller farming operations are producing specialised products such as wine, honey, chickens, olive oil, tea and coffee. A high proportion of the produce is traded online and also at local markets held fortnightly and monthly within the town.

An opportunity exists to market the Seymour region as a value add, alternative farming area to attract new food processing businesses into the region and create a produce brand. The land located on the Goulburn flats is of high quality and has the potential to be used for viticulture and sustainable farming practices.

The agriculture industry, however, faces increasing challenges surrounding climate change including the degradation of land quality and an increase in the regularity of extreme weather events such as drought, flood and fire.

The geographic location of Seymour is very advantageous in that it has favourable transport links to Melbourne, as well as being in close proximity to the Goulburn Valley Food Bowl (food growing areas). There are definite synergies that could be taken advantage of in the future.

TRANSPORT, POSTAL AND WAREHOUSING / DISTRIBUTION

Seymour is well positioned to attract transport, warehousing and distribution businesses in terms of access and proximity to major road and public transport infrastructure, as well as proximity to metropolitan Melbourne and significant food producing areas in the North (Goulburn Valley Food Bowl).

The location of transport, logistics, warehousing and distribution businesses need to be located in close proximity to the Hume Freeway to allow ease of access for businesses, as well as redirecting heavy vehicles away from the town centre. Taking into account zoning and overlay sensitivities, land north of the town centre is an ideal location for such industries.

TOURISM / ACCOMMODATION AND FOOD SERVICES

MILITARY HISTORY AND RAIL HERITAGE

Seymour has a strong military history and rail heritage and thus is the notable tourism strength for the region. The town has a number of attractions that showcase these strengths including the Vietnam Veteran Commemorative Walk, Lighthorse Memorial Park, Pioneer Park and the Heritage Rail Service Centre.

The Puckapunyal Army Base is in possession of the most historically significant army tank and artillery collection in Australia. Speaking with the army base, the collection is unable to leave their grounds due to the historical, memorial and educational significance of the collection. However, the synergies between Seymour and Puckapunyal and the willingness to showcase the collection to the public presents a major tourism and educational opportunity for a stand-alone museum to be developed at the front of the army base.

Seymour is renowned for its rail heritage. The Seymour Railway Heritage Centre (SRHC) restores historically significant locomotives and its collection includes the Queens carriage and the governor general carriage. The SRHC operates special passenger services throughout Victoria and Interstate utilising its extensive fleet of preserved diesel locomotives and air-conditioned steel and heritage wooden passenger carriages.

Passenger trains are available for charter and can be utilised for weddings, birthdays, conferences and other special functions.

Military history and rail heritage are existing tourism strengths of Seymour and the surrounding region. These strengths are important to the historical origin and fabric of the township. Although it is important to diversify the tourism product offer in Seymour, there is an opportunity to continue to develop the existing product and provide complimentary attractions.

NATURE BASED TOURISM

Seymour is in close proximity to naturally significant areas such as the Tallarook Ranges, Kinglake Ranges and Mount Disappointment, Lake Nagambie and the Strathbogie Ranges. There is an opportunity to extend the rail trail starting position from Tallarook to Seymour. The trail could potentially follow the existing rail track along Dysart Road and cross the Goulburn River to connect with the existing starting point. The Great Victorian Rail

Trail is a major tourist attraction for the north east. The extension of the trail to commence in Seymour would significantly increase the number of daytrip visitors to the township.

There are further opportunities to better utilise the Goulburn River for tourism uses. The construction of the levee bank will unlock development opportunities along the river bank, thus increasing the likelihood of a riverfront precinct that utilises the aspect of the river.

The river is an ideal location for bushwalking, recreational boating and fishing. Anecdotally however, there are some safety issues with the River including varying water depths and debris (fallen trees, overgrown vegetation), which need to be considered.

Seymour is well serviced in terms of parks and reserves. There is existing infrastructure in place that supports recreational activities, notably in Lions Park and Goulburn Park. There is an opportunity to provide a link or trail that provides a connection between the towns boat ramps, bushwalking tracks and fishing piers. There is also an opportunity to further promote and advertise Seymour parks and reserves, as they are generally poorly advertised amongst visitors and they tend to have difficulties wayfinding throughout the town.

GATEWAY TO MELBOURNE

Seymour is well placed to be marketed as the final stopover destination before entering Melbourne from the North, similarly to Ballarat being the gateway to Melbourne from the West. The adequate supply of recreational parks and reserves makes Seymour an ideal location for self-drive tourists from Northern Victoria, Canberra, Sydney and Brisbane to stop and visit. Speaking with Caravan Parks within Seymour, there has been an increase in caravan occupancies in the town, particularly grey nomads and visitors to and from Tasmania.

There is an opportunity to provide products and attractions relevant to the visitor market profile in Seymour. This may include:

- Casual food and beverage offer (e.g. café's);
- Promotion of Seymour's parks and reserves as a rest stop for self-drive tourists (e.g. Goulburn Park, Pioneer Park);
- Camping and caravan supplies;
- Regional produce store.

An opportunity exists to improve the signage along the Hume Highway and the entrance to the town to promote Seymour's products and attractions. The existing entrance to Seymour requires streetscape upgrades to improve the entrance to Seymour off the Hume Freeway, along Emily Street.

Seymour has the potential to become a premier stopover destination. Goulburn and towns along the Southern Highlands (e.g. Mittagong and Bowral) in New South Wales are ideal stopover destination when driving from Melbourne or Canberra to Sydney. The attractiveness of these towns can be attributed to the picturesque streetscapes, quality dining options, local produce stores, surrounding landscapes and heritage buildings.

ACCOMMODATION

The current supply of accommodation in Seymour is generally low yielding caravan parks and motels. There is an opportunity to provide alternative accommodation facilities, which service different visitor markets.

There is an opportunity to provide high-quality serviced apartments, which cater to the visitor business market and higher expenditure visitors. There is the potential to explore the feasibility of a Quest Serviced Apartment establishment in Seymour.

The Goulburn River is an underutilised asset within the Seymour and there needs to be tourism uses that can be further leverage off the aspect of the River. There is an opportunity to provide nature based cabin/Eco lodge accommodation options, which are positioned along the banks of the Goulburn River, which allow visitors to utilise the river for recreational activities, as well as taking advantage of the River's natural surroundings.

CONFERENCE/EVENTS CENTRE

Seymour does not have a designated conference and events centre. A facility that can accommodate event visitors and business delegates would be a major tourism opportunity for the region. Seymour's location between Melbourne and some of the bigger regional Centres makes it a sensible location.

Investigation into potential locations will be required. It is envisaged that the location would also take advantage of the River aspect and natural setting, whilst having respect of existing planning restrictions (Flood and Land Subject to inundation Overlays).

FOOD AND BEVERAGE

Food and beverage is an important aspect of tourism in regional areas. The food and beverage offer in Seymour and Surrounds is limited. No. 96, The Brewer's Table and The Wine Kitchen are noteworthy dining options in the Seymour township. There are also a number of quality wineries located in close proximity to Seymour including Fowles, Tahbilk and Mitchelton. However, the overall food and beverage offer is limited. The increased establishment of noteworthy dining options will increase the attractiveness of Seymour as a stopover destination and increase the domestic visitation, particularly from self-drive tourists travelling through.

Tallarook and Tooborac have a unique boutique food and beverage offer that is popular amongst visitors. There is an opportunity to develop a produce brand for the Seymour and Surrounds region, which capitalises on the increasing number of small food producers in the region. Intensive farming uses are creating products such as fruit and vegetables, honey, olive oil and tea and coffee. Local produce could be traded in the Seymour township, whilst representing the whole region.

EVENTS

Events are a significant contributor to regional economies as they help decrease seasonality and attract visitors from outside of the region. Seymour has a number of signature events including Tastes of the Goulburn, The Alternative Farming Expo and the Seymour Darley Cup. Continual support needs to be provided for these events in respect of promotion/advertising and grant funding to provide long term certainty.

There is also an opportunity to increase the number of events in Seymour and Surrounds. The development and provision of new events could reflect existing strengths of the region, which include equine, the Goulburn River (e.g. fishing, recreational boating), agriculture, military history and rail heritage. There is also an opportunity to explore the provision of events that reflect emerging strengths including food and beverage, sport and recreation, music, and arts and culture.

Anecdotally, during signature Seymour events, there is an issue with visitors being able to visit retail and food and beverage establishments in the township after regular trading hours. There is a need to liaise with local businesses to extend business trading hours to cater to the event visitor market. Major events such as the Tastes of the Goulburn and the Alternative Farming Expo attract a significant number of visitors from outside of the region. The unavailability of food and beverage in the town during major events reflects poorly on Seymour and contributes to a negative experience for the visitor.

There is an opportunity to liaise with tourism businesses in Seymour and develop an events package, which offers event visitors with tickets to the subject event, food and beverage, and overnight accommodation in Seymour.

PRODUCT GAPS

Tourism product gaps were identified for Seymour through the development of the Goulburn River Valley Tourism Destination Management Plan. Product gaps and potential opportunities include:

1. **A quality café / boutique / coffee offer in Seymour** – Potential to be linked to the Vietnam Veterans Commemorative Walk. Opportunity to increase yield, capture passing trade (Hume Freeway/Goulburn Valley Highway) and cater to strong business and VFR markets.
2. **Riverside infrastructure, amenity, product and events** – Currently, the Goulburn River is an underutilised natural asset. Opportunity to leverage from the Goulburn River by increasing the proportionate use of the river for recreational activities including fishing, kayaking, walking, cycling, boating and bird watching.
3. **General quality of dining options** in the region – There is a shortfall of quality lunch and dinner dining options in the region. Opportunity to capture the weekend VFR market and the mid-week business market.
4. **Higher quality retail amenity** to cater for visitors who like to go shopping – Opportunity to capture surrounding population of Puckapunyal, Tallarook, Avenel and Trawool.
5. **High quality self-contained accommodation in Seymour** that caters for VFR and business markets, similar to a small/medium scale Quest accommodation.
6. **The provision of conference facilities in Seymour** to capitalise on the accessibility and stature of the town as a regional centre.
7. **Clear establishment and connection to existing and potential future touring routes in the region** – touring routes for recreational walking/cycling, history/heritage and food and wine.

8. **Establish Arts and Culture tourism product such as a museum/art gallery** – Diversify the Arts and Culture product in Seymour to appeal to a variety of domestic visitor markets.

9. **Explore the potential for an indigenous trail** – Seymour and Surrounds is traditionally the home of the Taungurung people. There is potential to establish an indigenous trail that informs visitors of the legacy and traditions of the Taungurung people.

The product gaps identified above are seen as the standout existing shortfalls for tourism product and infrastructure in Seymour and present future opportunities for the tourism industry.

TABLE 14 SWOT ANALYSIS – SEYMOUR AND SURROUNDS

Strengths	Weaknesses	Opportunities	Threats
Geographic location - proximity to Melbourne and proximity to food growing areas (Goulburn Valley Food bowl) and regional centres (Shepparton, Wangaratta)	Low socio economic profile - low participation, low education levels	Agriculture - intensive, value- add farming alternative farming uses, food processing	Climate change – Threat of regular extreme weather events (fire, drought, flood)
Transport - access to Hume Freeway and Goulburn Valley Highway Train services that travel south to Melbourne CBD and North to Albury	Shortage of skilled and qualified workers	Equine - continue to grow the equine precinct including thoroughbred breeding, training, recreational equine and equine lifestyle	Below average growth to continue
Natural attractions - Proximity to Goulburn River, Tallarook Ranges, Kinglake Ranges, Strathbogrie Ranges, Lake Nagambie	Under representation of knowledge based industries - too reliant on public sector for employment (Public administration & training, Education and Health)	Tourism opportunities continue to develop - Army Tank Museum, greater promotion and capitalisation of existing events, extension of the rail trail, accommodation, conference & events centre	
Natural/rural setting - Parks and reserves	Below average population and housing growth	Transport, postal and warehousing - Strategically located with significant road infrastructure to develop this industry	
Access to quality agricultural land	Unemployment and youth unemployment rate is higher than state average	Education and Training - Further develop existing educational institutions. Opportunity to leverage off the Goulburn River (aquaculture)	
Land availability and affordability	Industrial zoned land needs to be further developed (road infrastructure and services) to attract new businesses	Gateway to Melbourne – Market Seymour as the gateway to Melbourne, promoting the town as a premier stopover destination for self-drive tourists and domestic daytrip visitors	
Military and Rail heritage tourism strengths	Lack of residential housing mix	Resident attraction – Attractive lifestyle, provision of health and education services, affordable housing	
Well-serviced for community and social infrastructure relative to population size	Configuration of the town – Wayfinding and town promotive signage		
Strong retail base - Captures population from surrounding townships (Yea, Euroa, Avenel and Nagambie)	Accommodation and event/function centre shortfall		
Equine breeding and training area – Seymour Racecourse, premier thoroughbred studs, training facilities	Planning restrictions on land surrounding the Goulburn River due to the threat of flooding - Urban Floodway Zone (UFZ)		
Tourism events – Tastes of the Goulburn, Alternative Farming Expo, Military Heritage Weekend, Seymour Darley Cup	Poor telecommunications – Internet connection and speed		
Resilient community – Seymour Chamber of Commerce, Sustainable Seymour, The Seymour We Want			

7.5. KILMORE/BROADFORD

The following section provides a summary of the issues and opportunities facing economic development in the Kilmore/Broadford region. This section will also identify potential growth industries in the sub-region.

RESIDENT ATTRACTION

A major opportunity in Kilmore/Broadford is the ability to attract tree change residents into the area. Kilmore/Broadford is an ideal location for people seeking larger residential allotments in a peri-urban setting. Kilmore in particular is well serviced in terms of education, health and retail, which positions the town well in attracting the working population. There is an opportunity to promote Kilmore and Broadford as lifestyle towns.

Kilmore/Broadford, similarly to the other townships in the Shire, have accessible transport infrastructure, which is a significant strength of the region. Broadford has good access to the Hume Freeway, as well as rail line access connecting to Metropolitan Melbourne, which provides residents with commutability.

Anecdotally, the local resident and working population in Kilmore and Broadford suggest that the train services during peak times are overly congested and are a deterrent for commuters. There is a need to provide additional rail services during peak times, particularly to Mitchell South (Wallan, Kilmore and Broadford).

Consulting with the Kilmore/Broadford community, there is a need to improve the level of youth entertainment in the region in order to attract young families to the region. There is a shortfall in youth entertainment products, which is a deterrent to attracting young families to the area. There is an opportunity to develop community youth programs that are targeted towards school kids in the area. Programs could include sport and recreation, arts and music and could provide kids with options for extracurricular activities.

HERITAGE BUILDINGS

Kilmore's heritage buildings located throughout the township, and in particular along Sydney Street are an iconic strength of the township. The heritage buildings are generally underutilised as a high proportion of them are vacant. The major issues associated with the heritage buildings in Kilmore are the high rental costs and confusion surrounding development restrictions and allowances.

The heritage buildings in Kilmore present opportunities to improve the look and feel of the township. There is an opportunity to occupy the heritage buildings with retail trade, retail services, food and beverage services and/or pop-up stores.

BUSINESS INCUBATOR

There are a high proportion of home based small businesses in Kilmore/Broadford that are in need of resources that help support their operations. The home based businesses in Kilmore/Broadford are generally Professional, Financial and Administrative services. A business incubator or hub to be located in Kilmore is a major opportunity for the region.

The business incubator/hub would provide small businesses in the region with a facility to conduct business. The business hub could include rentable office space, meeting rooms and 'hot desking'. Small businesses may not require a single purpose office space and often it is not viable to do so. Therefore, an incubator could potentially fill a market gap in the region.

The business hub would also provide a facility in which similar businesses in the region could network. Further assessment needs to be conducted to identify potential sites for the location of the hub/incubator, as well as scale and capacity.

CONNECTIVITY

An issue with the townships of Mitchell Shire, and in particular Kilmore, Broadford, Wandong and Heathcote Junction is a lack of physical connectivity between the townships. The sprawled nature of the sub region contributes to a disconnect between industries across the townships. An opportunity is to more efficiently integrate the towns on a sub-regional level. This could be achieved through pedestrian and bicycle links, as well as redirecting local traffic networks.

There is a physical disconnect between Kilmore and Kilmore East. The train station is located in Kilmore East and there is a lack of infrastructure connecting Kilmore town centre to the train station. There is an opportunity to create a pedestrian/bicycle path that connects the two areas. There is also an opportunity to provide bus services that connect the town centre with the train station to improve the town's commutability.

The Kilmore-Wallan Bypass is a long term road infrastructure project that will aim to redirect traffic away from the main streets of Kilmore and Wallan. Although it is a long term prospect and funding for the project is yet to be secured, the State Government has confirmed a preferred route, which would witness the bypass travel down the western side of Kilmore. The western route would protect important assets including Monuments Hill, the Kilmore Racecourse and the Kilmore Golf Course.

Certainty for the preferred route allows VicRoads to continue planning for the construction of a roundabout at the Broadford-Kilmore Road intersection. The construction of the roundabout will be an important link in the western route option.

BROADFORD MOTORCYCLE COMPLEX

The Broadford Motorcycle Complex is a major motorbike facility that draws in visitors from all over Victoria and hosts regular events, however, businesses in the town centre are not benefitting economically from their operations. The Broadford Motorcycle Complex is located to the east of the Hume Freeway, which means that visitors travelling from the North do not travel through the town centre when visiting the complex.

Broadford needs to leverage further off the operations of the Motorcycle Complex, particularly capturing overnight and daytrip visitation expenditure. This could be achieved by creating a more positive relationship with the complex by promoting the town within the complex and encouraging visitors to explore the town centre.

The Broadford Motorcycle Complex is planning to increase the number of annual events it holds, thus there will be a subsequent increase in visitors to the complex. Anecdotally, the Broadford Motel has a high occupancy rate. There is an opportunity to explore the feasibility of an additional accommodation establishment in Broadford to service the visitors of the Motorcycle Complex.

There is also an opportunity to service visitors by matching the products and services offered in Broadford with the market needs of the visitors. Products and services could include casual dining and take away options and a specialty motorbike retailer that offers parts, clothing and apparel, helmets and gloves, as well as motorbike services.

EQUINE

The Kilmore/Broadford region has a strong equine presence in the Northern Victorian region. There are a number of thoroughbred and harness racing trainers in the region. The Kilmore Racecourse is located on East Street and hosts a number of annual thoroughbred and harness race events.

There are numerous thoroughbred equine properties in the region and there is an opportunity to grow the existing equine base, as well as further attract equine related industries into the region to service the increasing number of equine/rural lifestyle residents.

There are synergies that can be leveraged off, particularly with the Kilmore and Seymour Racecourses and the historical significance of thoroughbred breeding and training in the Shire and the greater region.

Mitchell Shire Council should continue to support the growth in thoroughbred equine and recreational equine sector within the region through supporting equine events and the potential growth in equine infrastructure (e.g. Kilmore Racecourse, Kilmore Equine Clinic).

RETAIL TRADE

An opportunity exists to develop the Retail trade industry in Kilmore/Broadford to provide local employment opportunities, as well as reducing escape expenditure and revitalising the town centre with higher quality retail offer. It is apparent that residents are travelling outside of the Shire for larger retail needs, notably travelling to the larger retail centres of Craigieburn, Epping and Bundoora.

There is currently \$20 million worth of retail development occurring in Kilmore. A state-of-the-art Toyota tyre and service centre, Country Target and McDonalds are currently under construction along Sydney Street in Kilmore and will provide local employment opportunities.

Kilmore is characterised by its heritage buildings along Sydney Street. Many of these buildings are vacant and provide future opportunities for retail trade or retail service businesses.

Kilmore's town centre is in need of certain revitalisation through street activation and streetscape improvements. Sydney Street is suffering from narrow pathways, heavy vehicle traffic and a lack of vegetation and pedestrian friendly infrastructure. An improvement to the streetscape and pedestrian friendly infrastructure would encourage and attract new retailers to the town centre.

AGRICULTURE AND FOOD PROCESSING

Speaking with local farmers in Kilmore/Broadford, there is a decline in viable commercial farming operations in the region and a transition from larger Broadacre farms to more intensive, value-add farming operations. This trend is a result of rising land values in the region and smaller land parcels. The rising property rates and increase in urban encroachment is a disincentive to new and existing farmers in the region. It is not uncommon for farmers in the region to have a number of smaller property holdings due to the smaller parcels in the region. A disincentive for farmers is the multiple property rates that are required. There is an opportunity to recognise multiple rates and lower the charge to further promote farming operations in the region.

There are larger land holdings on the outskirts of Broadford that are operating viable commercial farms, however, in recent years there has been an increase in demand for rural lifestyle and hobby farms, as well as smaller alternative farming operations. There has been an increase in alternative farming operations such as permaculture, organic produce and holistic farming.

The commercial and higher level cattle farming operations in the region are an important contributor to the local economy. However, similarly to Seymour, there is an opportunity to grow the cottage agriculture industry that attract new residents and produce niche products in the region. There is an opportunity to create a regional produce brand for the region.

The rising demand for rural lifestyle and hobby farms is a competitive advantage for the region. Many of the new residents do not have knowledge, skills and qualifications required for farming. There is an opportunity to provide new rural lifestyle and hobby farmers with an educational tool kit, which provides certain information on agriculture, which acts as positive reinforcement for new residents.

An advantage for agriculture in the region is the trade that occurs between farms. Speaking with farmers in the region, buying and selling cattle is occurring directly between farms and food producers. This is advantageous for the region as it reduces costs and fees associated with Saleyards.

Another advantage for agricultural businesses in the region is the road access. The freeway corridor is particularly convenient for smaller farming enterprises as it provides ease of access to transport stock and produce between locations.

The agriculture industry, however, faces increasing environmental challenges including the degradation of land quality and an increase in the regularity of extreme weather events such as drought, flood and fire.

CONSTRUCTION

The Construction industry is a major employer and economic contributor to the output of the region. The demand for building and construction services will continue to grow in the Shire. Wallan and Surrounds are experiencing significant growth in development, particularly in residential properties. The demand for these industries will filter up to Kilmore/Broadford and present future opportunities for new and existing businesses.

The expected residential and commercial development in Mitchell South is likely to propel the local Construction industry in the short to medium term.

HEALTH CARE AND SOCIAL ASSISTANCE

As the population grows in Kilmore/Broadford, the demand for Health care and social assistance services will increase. The Kilmore and District Hospital is a large employer in the region and will present opportunities for growth in the future.

There is a need for disability and aged care services in the region. These services are underrepresented in the region and will provide local employment opportunities.

Wallan is growing at a significant rate including a major increase in housing growth through the attraction of young families into the area. Wallan township does not currently have a hospital, therefore, residents of Wallan travel to Kilmore to access the Hospital.

Kilmore has the potential to further leverage off the population growth in Wallan for Health care and social assistance services.

EDUCATION AND TRAINING

The townships of Kilmore and Broadford both have both primary and secondary schools. Kilmore includes Assumption College, which is a regionally renowned private secondary school and the Kilmore International School. The townships have an opportunity to further leverage from these educational institutions through infrastructure investment and development to facilitate an increase in enrollments.

The existing provision of high quality educational institutions within the Kilmore/Broadford contributes to attracting young families to the region.

Kilmore/Broadford is in close proximity to tertiary education institutions in northern Metropolitan Melbourne including RMIT Bundoora, Latrobe University, Polytechnic Broadmeadows and Kangan Institute of TAFE Craigieburn. There is an opportunity for the Kilmore/Broadford region to generate a relationship with one of the tertiary institutions and set up an ancillary facility in the region to leverage off existing primary and secondary facilities as well as specialising in regional industry strengths including Professional, scientific and technical services, Equine, Construction and Health care and social assistance.

TABLE 15 KILMORE/BROADFORD SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats
Lifestyle towns and villages - Attractive to new residents - tree change	Shortage of skilled and qualified workers	Business incubator/hub - Service the high proportion of residence based businesses	Climate change - more regular extreme weather events (fire, drought)
Transport - Access to Hume Freeway and train services	Excessive rental values in Kilmore town centre, particularly in heritage significant buildings	Equine - Continue to develop the equine strengths of the region - leverage further from racecourse and significant thoroughbred breeding and training areas	Residential encroachment on agricultural land - land degradation and change of land use
Heritage buildings in town centre	Onerous and restrictive heritage controls on heritage buildings in Kilmore town centre	Education and training - Explore opportunities for a tertiary institution to have a presence in the Kilmore/Broadford region (e.g. RMIT, Latrobe)	
Broadford Motorcycle Complex	Becoming unviable for commercial farms to operate due to the increasing land values	Agriculture – More intense use of land including alternative farming uses such as permaculture, viticulture and niche food production (honey, olive oil, vegetables, tea & coffee)	
Proximity to Melbourne	Poor connectivity between townships in the sub region	Health and social assistance - Demand for health care is increasing as the population grows. Only hospital in Mitchell South. Increase in demand for disability and aged care services.	
Health and Education – Kilmore and District Hospital, high quality primary and secondary schools	Poor street activation in Kilmore – Narrow footpaths, unsafe for pedestrians, high heavy vehicle traffic	Construction - Flow on affects from increase in residential & commercial development in Mitchell South	
Equine – Kilmore Racecourse, thoroughbred breeding and training	Lack of youth entertainment – Deterrent for attracting young or established families	Retail trade – Retail development is occurring now in Kilmore. Potential to increase the retail offer in Broadford	
		Broadford State Motorcycle Complex – Promote the town centre within the complex. Attract visitors of the complex to the town centre	
		Kilmore-Wallan Bypass – Long term prospect. Will contribute to street activation and greater connectivity of townships.	
		Streetscape upgrades – Encourage pedestrian activity, new retailers and main street revitalisation	

7.6. WALLAN AND SURROUNDS

The following section provides a summary of the issues and opportunities facing economic development in the Wallan and Surrounds region. This section will also identify potential growth industries in the region

LOCATION AND GROWTH

Wallan and surrounds is experiencing significant growth due to its partial inclusion within the Urban Growth Boundary. Wallan is projected to continue to grow into the future. The growth that is expected to ensue in Wallan will bring in organic economic benefits through the provision of services and an increase in demand for retail trade and retail services.

Wallan and Surrounds is an ideal location for businesses because of its favourable location and affordability. Wallan and Surrounds is in close proximity to Melbourne's CBD and the Melbourne Airport via the Hume Freeway, as well as other employment hubs including Hume and Whittlesea.

Wallan and Surrounds is well connected via rail services and the regularity of trains has increased in recent times due to the high level of commuter traffic during peak times.

LAND AVAILABILITY AND AFFORDABILITY

Wallan and Surrounds has ample land supply to accommodate future growth, however requires further provision of commercial and industrial land. The transport linkages and affordability of land in Wallan highlights the advantages of doing business in the region. Wallan and Surrounds, similar to the other sub-regions has the opportunity to attract big businesses that require larger land areas.

The Wallan Precinct Structure Plan (PSP) is currently underway and will be completed in the short to medium term. The outcome of the PSP will determine the amount and location of zoned land in Wallan. The findings of the Wallan PSP must be considered in the future planning of Wallan and Surrounds.

There is a lack of purpose built commercial and industrial floorspace that is ready to be occupied. An existing challenge in attracting new businesses to the sub-region is the need for further development of existing land such as the development of road and drainage infrastructure, the provision of services (water, sewerage, electricity) and availability of useable floorspace.

There is an opportunity to develop an industrial precinct and business hub in Wallan to attract businesses to the region. Further assessment on the demand for industrial land is needed.

BUSINESS INCUBATOR

Similarly, to the Kilmore/Broadford region, there are a high proportion of home based and start-up small businesses in Wallan and Surrounds that are in need of resources that help support their operations. A business incubator or hub to be located in Wallan and Surrounds is a major opportunity for the region and will help fill an existing office accommodation gap.

The incubator/hub would potentially provide the infrastructure and facilities for professional, financial and administrative services businesses in the region to undertake activities that cannot otherwise be carried out at home.

The incubator/hub could include a mixture of temporary and permanent rentable office space, meeting rooms and 'hot desking'. Many small businesses, particularly start-up businesses, do not rent or own a single purpose office space as it is not viable to do so. Therefore, an incubator/hub could potentially meet the demand for such a facility in the region. The incubator would also provide a facility in which similar businesses in the region could network and interact.

A key consultation outcome from businesses (predominately home based) located in the Wallan and Surrounds sub-region was the issue of unreliable and sparse internet access in certain parts of the region. The poor internet coverage throughout certain areas in the region is a particular barrier to business growth and somewhat confirms the need for a business incubator/hub that incorporates these services.

SPORT AND RECREATION

Wallan and Surrounds is well serviced in respect of sport and recreation assets. These assets contribute to the liveability and lifestyle of the region. There are also many natural assets that are in close proximity to Wallan that can be further leveraged off including the Whittlesea Ranges, Blair's Hut, Kinglake Ranges/Mount Disappointment, Tallarook Ranges and Hanging Rock.

Hidden Valley is an underutilised area that is ideal for walking and cycling, golf, motor biking and other recreational activities. Furthermore, there is an opportunity to provide a series of tracks and trails in the Wallan and Surrounds region to service both the local residents and the visitor population.

Wallan and Surrounds and Kilmore/Broadford include regionally significant skate park facilities which capture users from throughout Mitchell Shire and surrounding Local Government Areas for recreational and competitive purposes.

Mandalay Golf Course in Beveridge is a premier 18-hole golf course with ancillary facilities including a gym, swimming pool, tennis courts and a café, bar and restaurant. There is an opportunity to further attract daytrip visitors from areas of metropolitan Melbourne for sport, recreation and leisure activities.

WHOLESALE MARKET

There is an opportunity for Wallan and Surrounds to leverage off the recently relocated Wholesale Market located in Epping, adjacent to the Hume Freeway. The market accommodates approximately 4,000 business that trades fruit, vegetables and flowers, with products servicing areas throughout Victoria.

Many of the wholesalers trading at the market will potentially be reassessing their location of residence in order to live closer to the market. Anecdotally, since the opening of the market, there has been an increase in residential sales in Wallan.

MERRIFIELD BUSINESS PARK

The Merrifield precinct is located along Donnybrook Road to the south and along Hume Freeway to the east in Mickleham and will include a mixture of residential, industrial, retail and commercial space. Merrifield is planned to incorporate 5,000 homes, as well as a 330-hectare purpose-built business park that will support approximately 25,000 new jobs. Merrifield started construction in September 2015.

Dulux are relocating their operations from Brisbane and Sydney to a new state-of-the-art facility in Merrifield Business Park on a 17-hectare site valued at \$165 million. Dulux was attracted to Merrifield's access to major transport infrastructure including the Hume Freeway, Melbourne Airport and the Port of Melbourne. The land availability in Merrifield and the access to a skilled workforce in the northern growth corridor were also contributing factors.

Although Merrifield is located within the Hume Local Government Area, it will provide a significant number of job opportunities for the resident population of Mitchell Shire, particularly in Wallan, Kilmore and Broadford. Wallan is located 12 kilometres North of Merrifield and can be directly accessed via the Hume Freeway.

Wallan and Surrounds and the other sub regions need to understand how they can benefit economically from the development of the Merrifield Precinct. Wallan and Surrounds would be able to attract residents who are seeking employment opportunities in the business park as there are a number of competitive advantages including location, lifestyle and access.

CONSTRUCTION

Currently, the Construction industry in Wallan and Surrounds has the highest number of businesses and is the industry that employs the second highest number of people in the region. The economic importance of the Construction industry is attributed to the high level of residential and commercial development that has occurred in Wallan in recent years. This development is expected to increase with the completion of the Wallan Precinct Structure Plan, which will amend the planning scheme to include designated areas of zoned land.

The Construction industry is a key propulsive industry in Mitchell Shire and provides a high level of employment and adds value to the local economy, however, there will be challenges in sustaining the growth of the industry as the demand for construction products services decreases in the long term.

RETAIL TRADE

The retail trade industry will organically develop in the Wallan and Surrounds region as the demand for retail and retail services increases proportionately with the increase in resident and working population.

The major shopping centre in Wallan opened in 2004 and has improved from an initial escape expenditure of 78% to an escape expenditure of 40%. The Wallan Precinct Structure Plan makes recommendations for an increase in commercial retail space, which will be developed over time. The additional retail floorspace will provide local employment opportunities.

The retailers in Wallan and Surrounds must ensure that retail escape expenditure is limited and there is an effort to reduce the proportion of residents travelling to other nearby retail centres including Epping, South

Morang and Craigieburn. These retail centres generally include larger retailers and thus have a more advanced retail mix which services a different market.

PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES / FINANCIAL AND INSURANCE SERVICES

Participants of the business workshop conducted in Wallan and Surrounds suggested that there are a growing number of 'white collar' industry businesses in the region. A high proportion of these businesses are start-up businesses and are generally based from home whilst in their initial stages. There is a need to support start-up businesses, as well as attract new and innovative businesses into the region to provide a diverse range of employment opportunities.

There is an opportunity to bring employment into the region by attracting businesses from northern metropolitan Melbourne and encouraging businesses to relocate to the Shire for a number of reasons including proximity to major transport infrastructure (Hume Freeway, Melbourne Airport, the Port of Melbourne), locational advantages (proximity to Melbourne and North East Victoria), commutability, cheaper land values, lifestyle attractions and new business opportunities.

TRANSPORT, POSTAL AND WAREHOUSING

Wallan and Surrounds is an ideal location to attract new or existing Transport, postal and warehousing businesses. The area is well connected via the Hume Freeway and businesses can distribute to Metropolitan Melbourne, as well as other areas throughout North and North east Victoria.

Anecdotally, in recent times, there has been a high take up rate for industrial land in the region. The inclusion of additional industrial land will be dependent on the adoption of the Wallan Precinct Structure Plan, which is near completion.

Speaking with a major land holder and property developers in the region, there is high demand for industrial and commercial zoned land. If there was well serviced zoned land, then it would be readily taken up by businesses.

There is a long term plan to create a major transport and logistics hub known as the Beveridge International Freight Terminal (BIFT) in Beveridge. The development of the BIFT would create a significant number of local employment opportunities for Mitchell Shire.

The BIFT is a long term prospect, however when completed, it is expected to be a major economic asset for Mitchell Shire.

TABLE 16 WALLAN AND SURROUNDS SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats
Strong population and housing growth	Shortage of skilled and qualified workers	Business incubator/hub - Service the high proportion of home based businesses in the region	Climate change - More regular extreme weather events (fire, drought)
Transport Infrastructure - Access to Hume Freeway, train services, Melbourne Airport and Port of Melbourne	Trains are becoming overly congested during peak times	Construction - Flow on affects from increase in residential development in Mitchell South	Residential encroachment on agricultural land - Land degradation and change of land use
Land availability – Provision of residential, commercial and industrial land. Dependent on Wallan Precinct Structure Plan (underway)	Competing with other major employment areas including Hume and Whittlesea	Wholesale market in Epping - Leverage further through relationships with fruit, vegetable and flower producers. Potential to attract workers to live in Wallan & Surrounds	
Lifestyle - Suburban living in a rural setting	Losing a proportion of retail expenditure to larger retail centres including Epping, Craigieburn and South Morang	Transport, postal and warehousing - Attract new businesses to the region. Attractive due to land availability and affordability	
Natural attractions - Proximity to Whittlesea ranges, Blair's Hut, Kinglake Ranges/Mount Disappointment and an abundance of tracks and trails	Internet access and coverage can be inconsistent	Professional, scientific and technical services	
	Lack of purpose built commercial and industrial floorspace	Merrifield precinct – Leverage off significant resident and working population expected from Merrifield precinct in Mickleham	
		Beveridge International Freight Terminal – Long term prospect	
		Sport, recreation and leisure – Further develop sport, recreation and leisure products and attractions.	

8. INFRASTRUCTURE PROJECTS

8.1. INTRODUCTION

This section identifies infrastructure projects for Mitchell Shire over the next five years. The identification and implementation of key infrastructure projects will be an integral aspect of growing Mitchell Shire's economy.

Infrastructure projects were identified in conjunction with the following:

- Consultation with key stakeholders (workshops and one-on-one meetings);
- Mitchell Shire Council's National Growth Areas Alliance; and
- Mitchell Shire Council planning documents and policy.

It will be important for the Economic Development Strategy to identify a priority list of infrastructure projects drawing from the projects listed below.

8.2. PUBLIC TRANSPORT PROJECTS

- Increase bus services in Wallan and Kilmore;
- Ensure that bus services meet all V/Line trains from Wallan, Kilmore East and Seymour;
- Wallan train station revitalisation;
- Kilmore East and Seymour train station parking improvements;
- Increase the frequency of train services on the Seymour line;
- Provide Wi-Fi services on the Seymour line;
- Increase the provision of bicycle friendly carriages on the Seymour line; and
- Establish a train station in Cloverton/Lockerbie and Beveridge.

8.3. ROAD INFRASTRUCTURE AND STREETScape PROJECTS

- Develop a pedestrian/bicycle connection from Kilmore East train station to Kilmore town centre;
- Streetscape improvements and revitalisation – High Street, Wallan;
- Kilmore-Wallan Bypass;
- Kilmore town centre revitalisation – notably streetscape improvements and upgrades along Sydney Street;
- Cloverton-Gunns Gully Hume Freeway interchange;
- Watson Street upgrade and Hume Freeway Diamond Interchange;
- Unlocking Wallan's Economic Potential;
- Wallan South on/off ramp infrastructure; and
- Upgrade Lithgow Street Hume Freeway underpass and include a footpath underneath

8.4. EDUCATION INFRASTRUCTURE PROJECTS

- Establish the Mandalay Primary School;
- Improvements to Seymour Secondary College;
- Beveridge Primary School upgrade expansion; and
- Wallan Primary School expansion.

8.5. ENABLING INFRASTRUCTURE PROJECTS

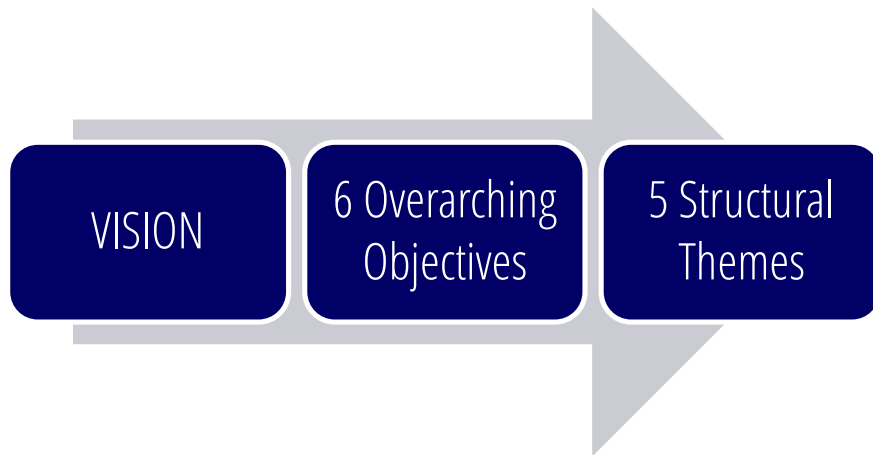
- Seymour levee bank;
- Army Tank and Military Heritage Museum at Puckapunyal/Seymour;
- Broadford Motorcycle Complex expansion;
- Investigate the potential for extended internet services to 'blackspots' in Mitchell Shire, including the potential layout of the National Broadband Network (NBN);
- Greater Wallan Merri State Park;
- Design options for Queen Street, Wallan;
- Regional composting facility feasibility study and investment attraction;
- Feasibility study for the establishment of a business incubator in Mitchell townships;
- Wallan recreation and sporting precinct;
- Heathcote to Wallan Rail Trail;
- Equestrian centre in Seymour;
- Seymour riverside precinct;
- Revitalise the Old Goulburn Bridge in Seymour; and
- Establish the Mandalay Community Centre.

9. MITCHELL SHIRE ECONOMIC DEVELOPMENT FRAMEWORK

9.1. INTRODUCTION

The following presents a framework for consideration of the Economic Development Strategy. The aim of this framework is to present a logical approach to the key issues and opportunities facing the economy in Mitchell Shire.

9.2. EDS FRAMEWORK



9.3. VISION FOR ECONOMIC DEVELOPMENT

The vision for economic development in Mitchell Shire is identified below. This draws on outcomes from consultation with Mitchell Shire's community and also relates to the State Government definition of local economic development.

"Mitchell Shire will build its economic capacity in order to improve its economic future and the quality of life for its communities. Mitchell Shire will work collaboratively with business, Government and other organisations to create better conditions for jobs and business growth".

9.4. OVERARCHING OBJECTIVES

The following overarching objectives are provided to define the emphasis of the Economic Development Strategy and Mitchell Shire Council's role in Economic Development over the next five years.

- Improve governance and systems within Mitchell Shire that support business
- Improve the liveability of Mitchell Shire including a mix of health services, housing and social and physical infrastructure to attract residents and businesses
- Provide increased focus and effort towards attracting industry that meets the needs and competitive strengths of Mitchell Shire
- Advocate for the upskilling, training and job readiness of Mitchell Shire's residents
- Strengthen engagement, relationships and communication with business
- Facilitate and advocate for investment strategic infrastructure which supports the economy and liveability of Mitchell Shire

9.5. THEMES

The following themes will be used to structure the economic development strategy so that it is accessible and clear to Mitchell's diverse community. The themes are set around a spatial representation of Mitchell Shire as the Shire's diverse geography, demographics and economy define the economic role and opportunities within each area. This is a unique element of Mitchell Shire which sets it apart from many other Local Governments in Victoria.

BEST PRACTICE IN ECONOMIC GOVERNANCE

AREAS OF FOCUS

- Mitchell Shire business group
- Networking events and business engagement
- Business hubs
- Training
- Planning support
- Succession of staff
- Linking with Hume, Whittlesea and Strathbogie Shire
- Priority investment projects

ESTABLISHMENT OF SEYMOUR AS A VIBRANT, MAJOR REGIONAL CENTRE

AREAS OF FOCUS

- Riverfront tourism precinct
- Riverfront tourism opportunities
- Accommodation
- Conference centre
- Events
- Equestrian and indoor events arena
- Industrial super lots for large food processing and transport and logistics businesses
- Business services attraction

- Improving perceptions of Seymour
- Retirement housing and aged care
- Education

ECONOMICALLY PRODUCTIVE RURAL AREAS

AREAS OF FOCUS

- Goulburn River horticulture and aquaculture
- Equine uses
- Rural residential
- Tourism
- Agri-tourism
- Rural strategy

WELL SERVICED AND LIVEABLE GROWTH AREA [WALLAN, BEVERIDGE AND SURROUNDS]

AREAS OF FOCUS

- Regional park
- Business hub
- Strengthen business services
- Township linkages – Wallan, Beveridge
- Land availability and affordability
- Entertainment
- Industry growth opportunities:
 - Retail trade
 - Professional and advanced business services
 - Construction sector
 - Transport, storage and distribution
 - Service industrial

STRENGTHENING MITCHELL'S LIFESTYLE TOWNS AND VILLAGES [KILMORE, BROADFORD, HEATHCOTE JUNCTION, WANDONG]

AREAS OF FOCUS

- Streetscape investment
- Township linkages – trails connecting Broadford, Kilmore, Wandong, Heathcote Junction
- Retirement housing and aged care (Kilmore)
- Post-secondary education presence in Kilmore
- Accommodation investment in Broadford
- Café and restaurant development in Kilmore and Broadford
- Branding
- Business hub in Kilmore
- Leveraging from Broadford State Motorcycle Complex
- Industry growth opportunities:
 - Equine
 - Retail trade
 - Agriculture and food processing
 - Construction
 - Health care

APPENDIX A BUSINESS SURVEY RESULTS

DRAFT



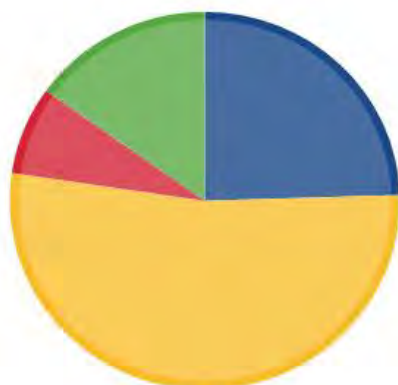
MITCHELL BUSINESS SURVEY

RESULTS
JULY 2014 - JUNE 2015

Q1. Does your business:

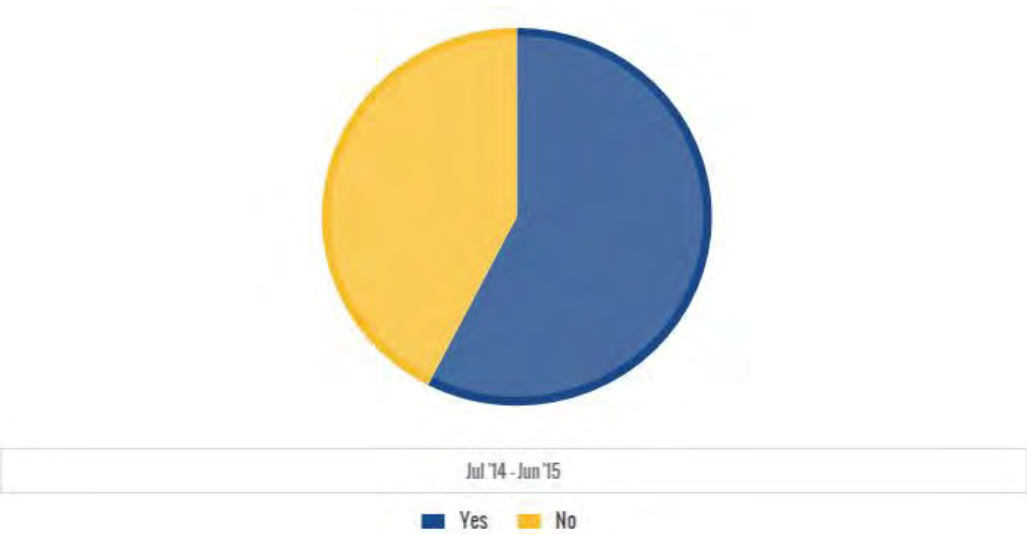
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Own Property	52%
Rent Property	24%
Other	15%
Share Space	7%



Q2. Is your business home-based?
AVERAGE PER RESPONDENT

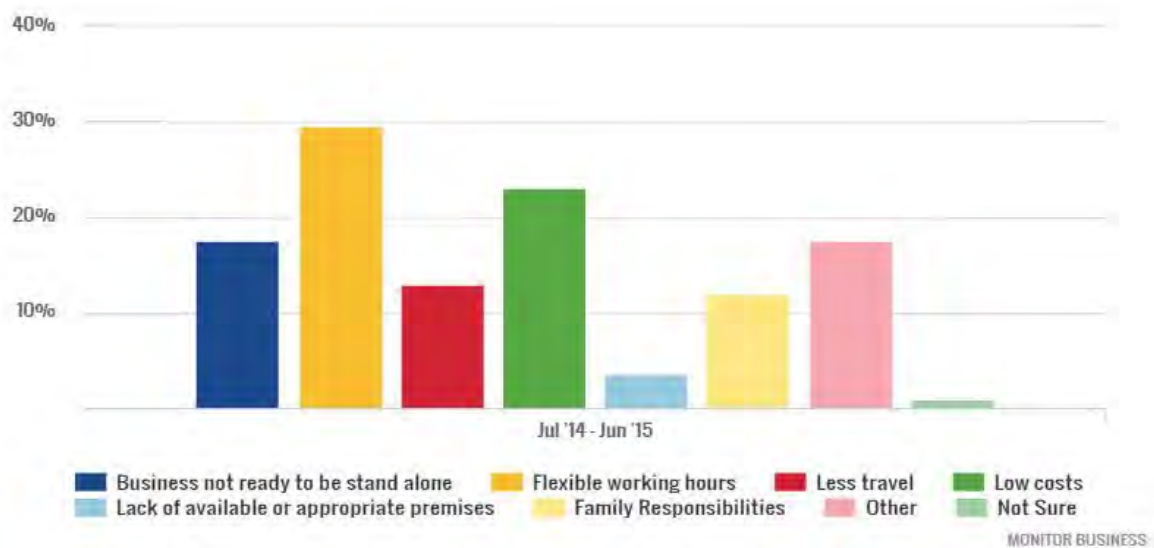
	Jul 2014 / Jun 2015
Yes	56%
No	42%



Q3. What are the main reasons for your business being home-based?

AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Flexible working hours	30%
Low costs	23%
Other	18%
Business not ready to be stand alone	18%
Less travel	13%
Family Responsibilities	12%
Lack of available or appropriate premises	4%
Not Sure	1%

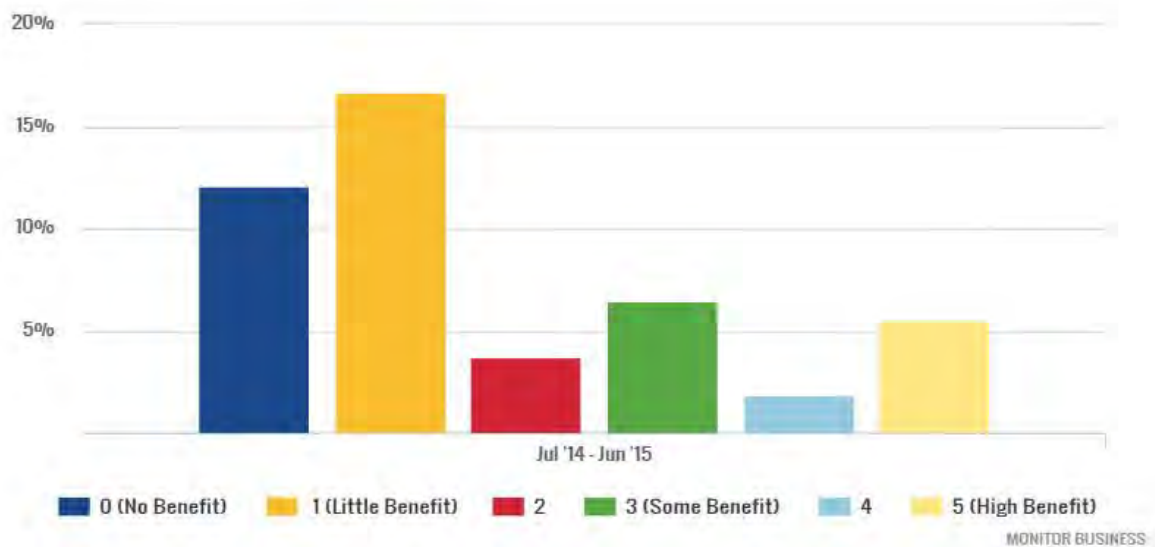


Q4. As a home based business, which of the below services or facilities would benefit your business?

AVERAGE PER RESPONDENT

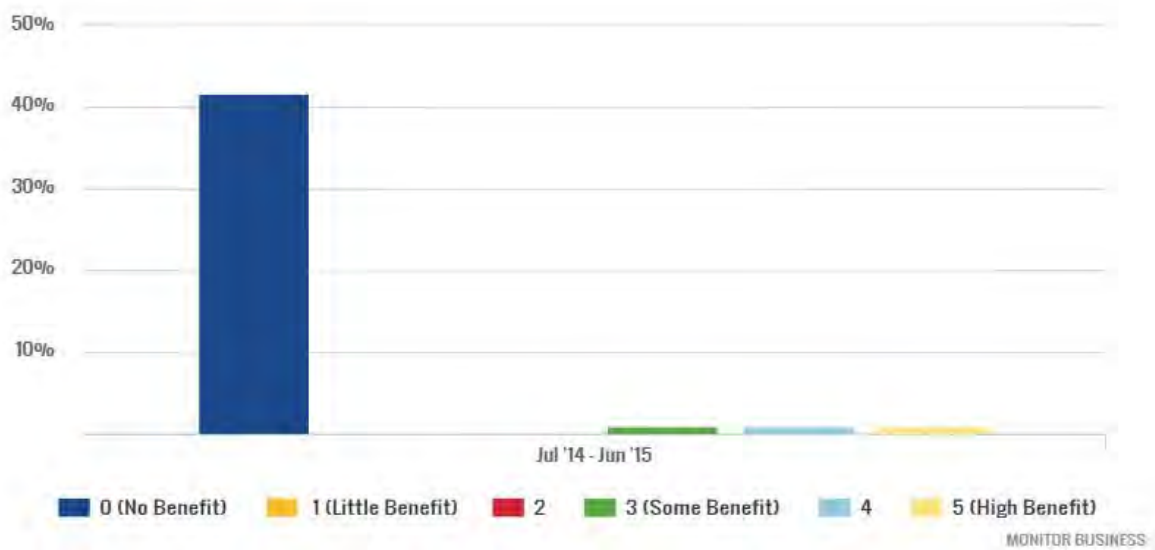
Administration / support services

	Jul 2014 / Jun 2015
1 (Little Benefit)	17%
0 (No Benefit)	12%
3 (Some Benefit)	6%
5 (High Benefit)	6%
2	4%
4	2%



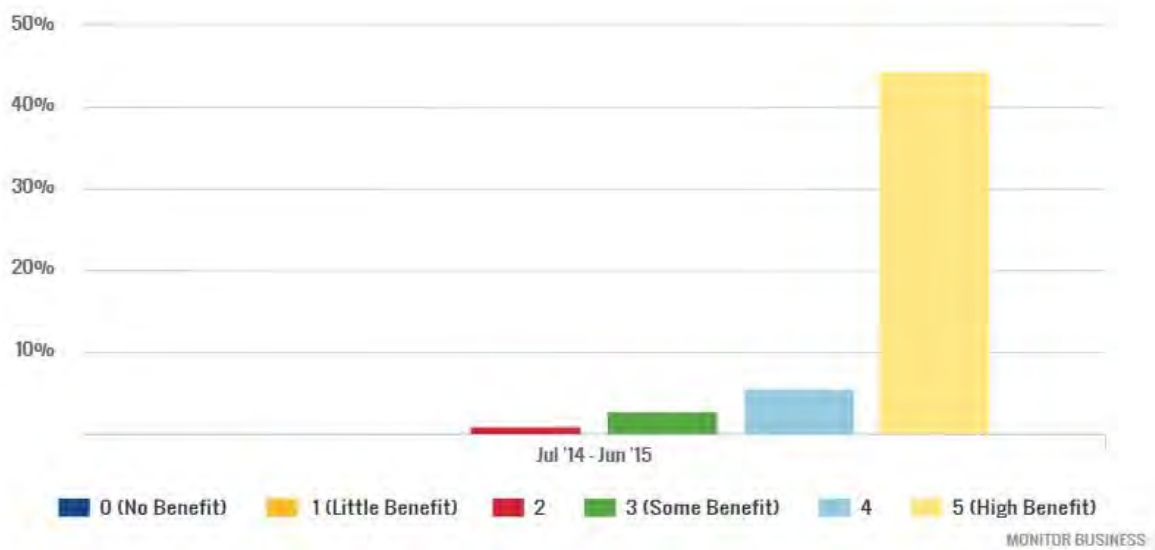
Commercial kitchen

	Jul 2014 / Jun 2015
0 (No Benefit)	42%
5 (High Benefit)	1%
3 (Some Benefit)	1%
4	1%
1 (Little Benefit)	0%
2	0%



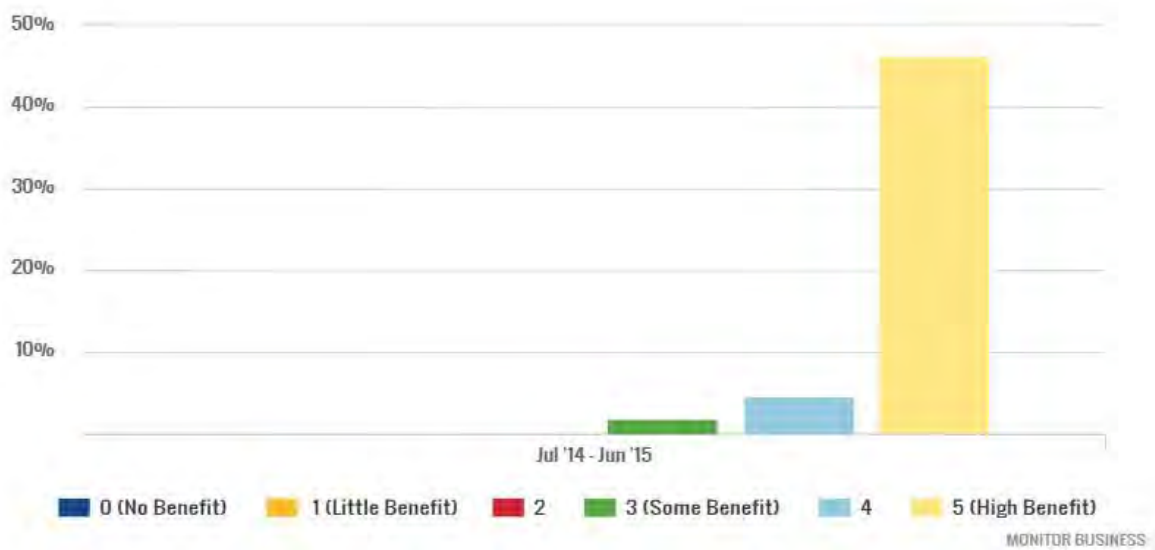
High speed internet

	Jul 2014 / Jun 2015
5 (High Benefit)	44%
4	6%
3 (Some Benefit)	3%
2	1%
0 (No Benefit)	0%
1 (Little Benefit)	0%



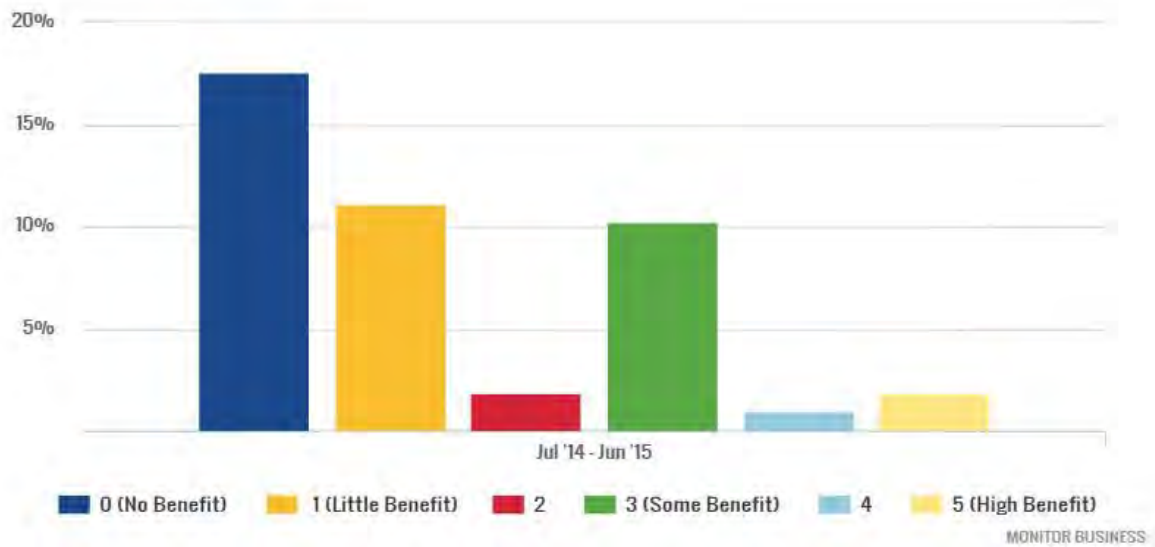
Good mobile connectivity

	Jul 2014 / Jun 2015
5 (High Benefit)	46%
4	5%
3 (Some Benefit)	2%
1 (Little Benefit)	0%
0 (No Benefit)	0%
2	0%



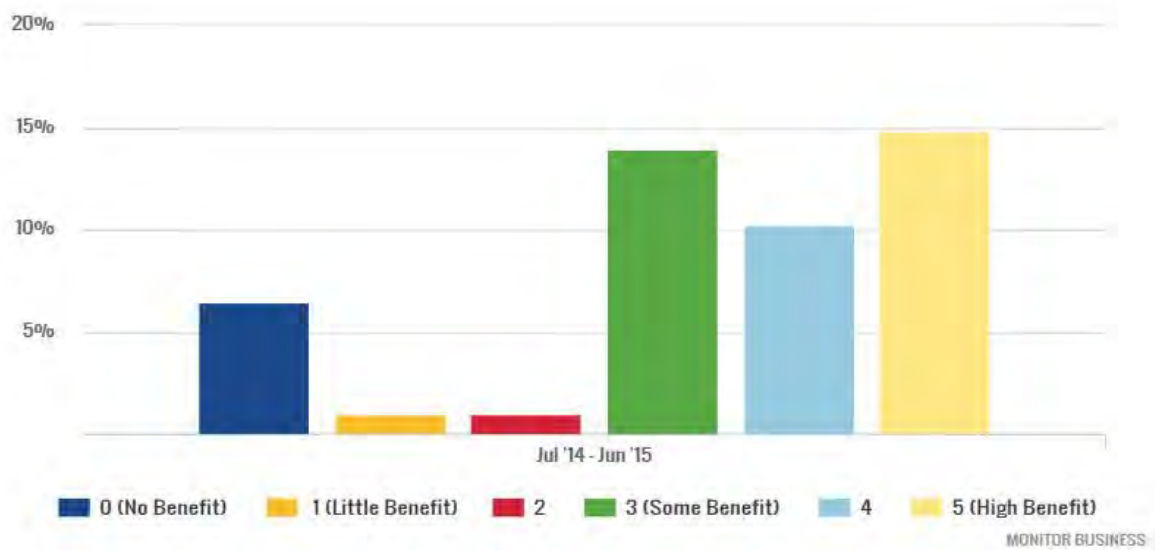
Meeting rooms

	Jul 2014 / Jun 2015
0 (No Benefit)	18%
1 (Little Benefit)	11%
3 (Some Benefit)	10%
2	2%
5 (High Benefit)	2%
4	1%



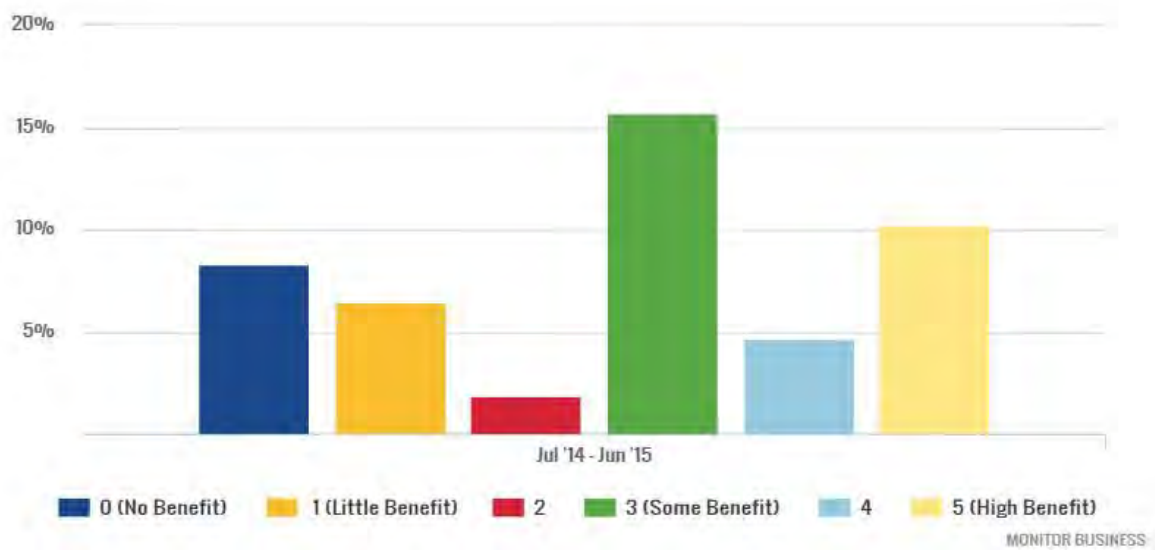
Business networking

	Jul 2014 / Jun 2015
5 (High Benefit)	15%
3 (Some Benefit)	14%
4	10%
0 (No Benefit)	6%
1 (Little Benefit)	1%
2	1%



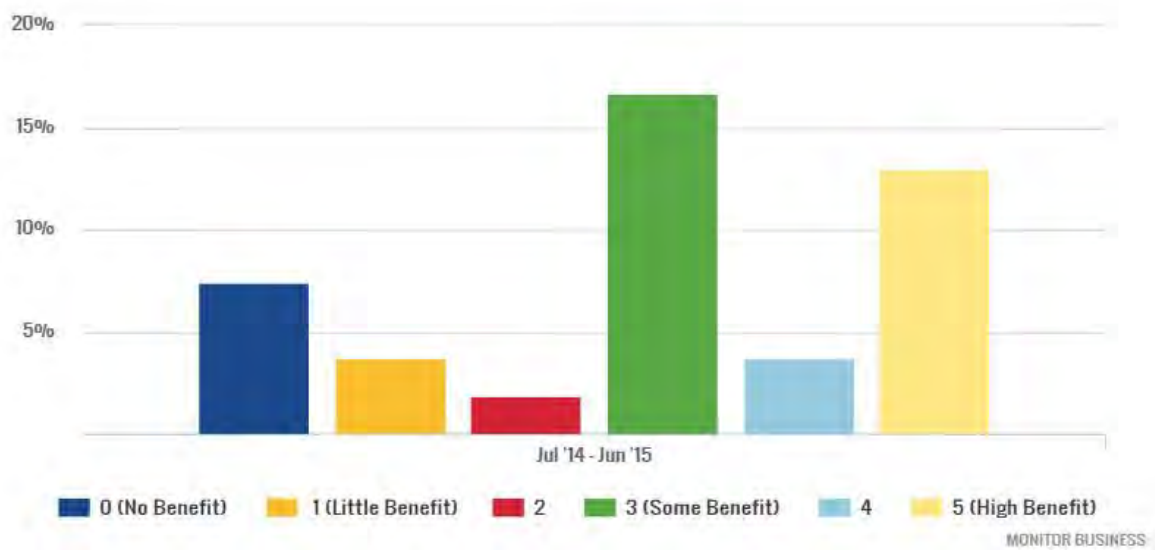
Personal networking

	Jul 2014 / Jun 2015
3 (Some Benefit)	16%
5 (High Benefit)	10%
0 (No Benefit)	8%
1 (Little Benefit)	6%
4	5%
2	2%



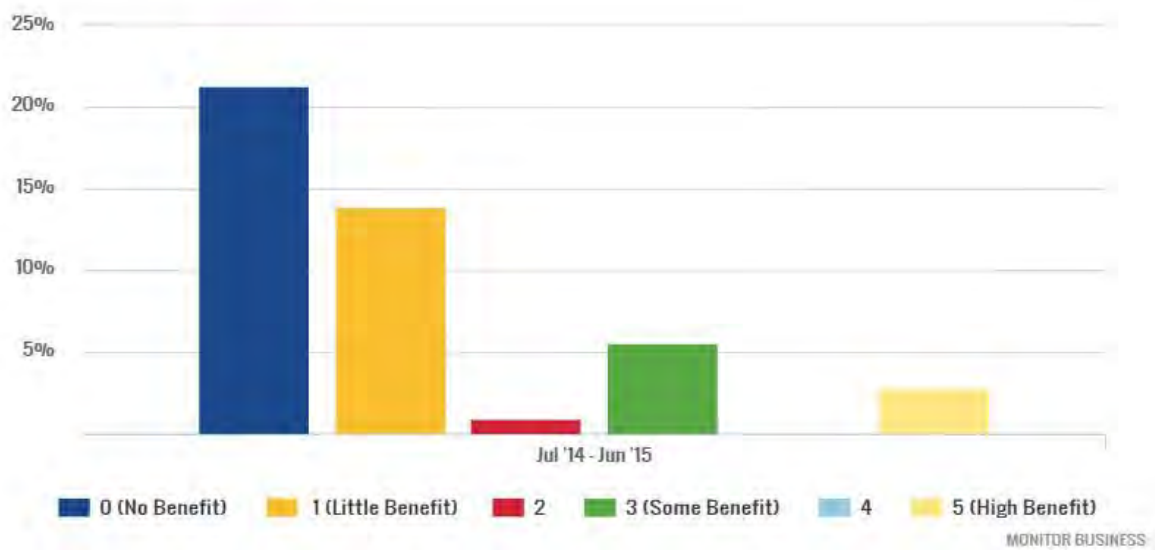
Professional development / training

	Jul 2014 / Jun 2015
3 (Some Benefit)	17%
5 (High Benefit)	13%
0 (No Benefit)	7%
1 (Little Benefit)	4%
4	4%
2	2%



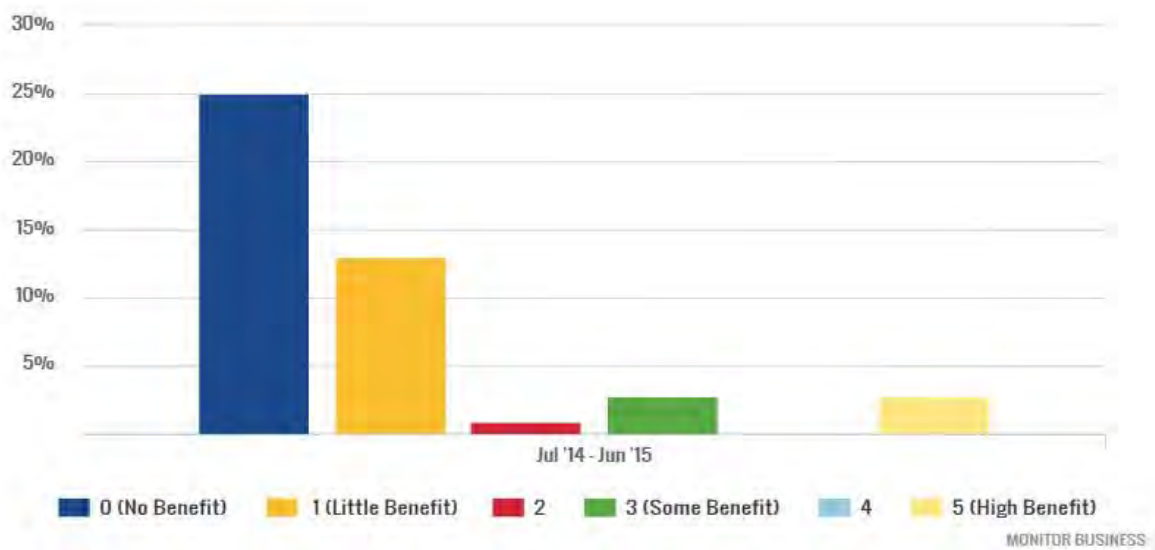
Temporary office space

	Jul 2014 / Jun 2015
0 (No Benefit)	21%
1 (Little Benefit)	14%
3 (Some Benefit)	6%
5 (High Benefit)	3%
2	1%
4	0%



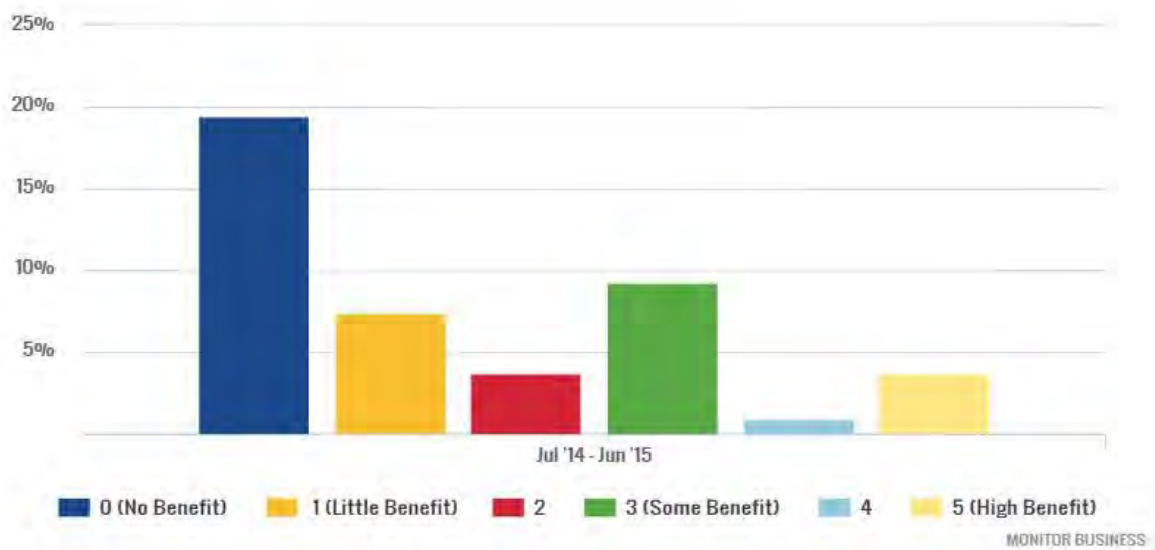
Temporary desk space

	Jul 2014 / Jun 2015
0 (No Benefit)	25%
1 (Little Benefit)	13%
5 (High Benefit)	3%
3 (Some Benefit)	3%
2	1%
4	0%



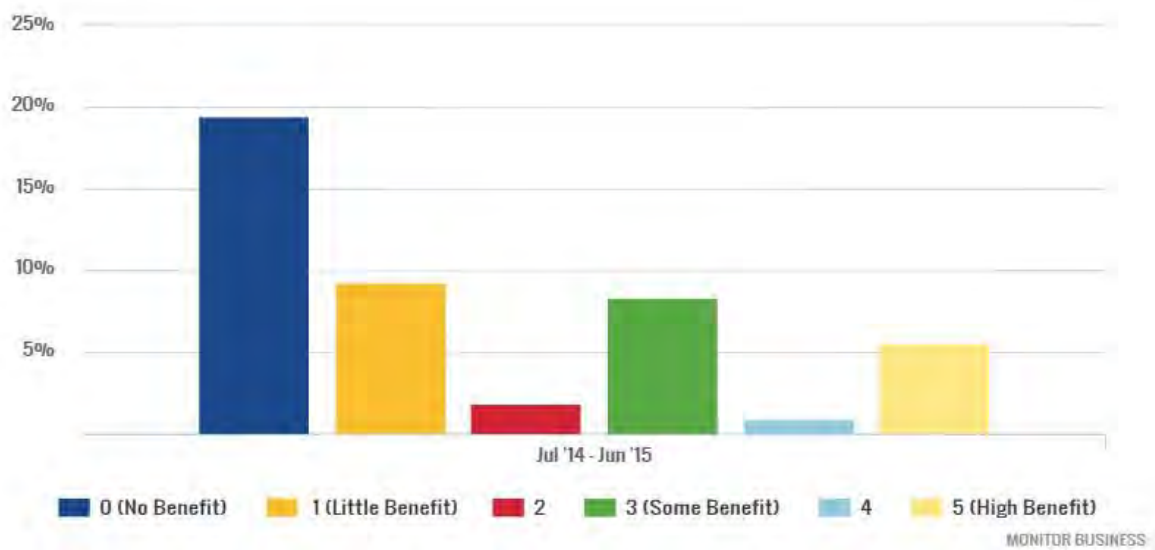
Video conferencing technology

	Jul 2014 / Jun 2015
0 (No Benefit)	19%
3 (Some Benefit)	9%
1 (Little Benefit)	7%
2	4%
5 (High Benefit)	4%
4	1%



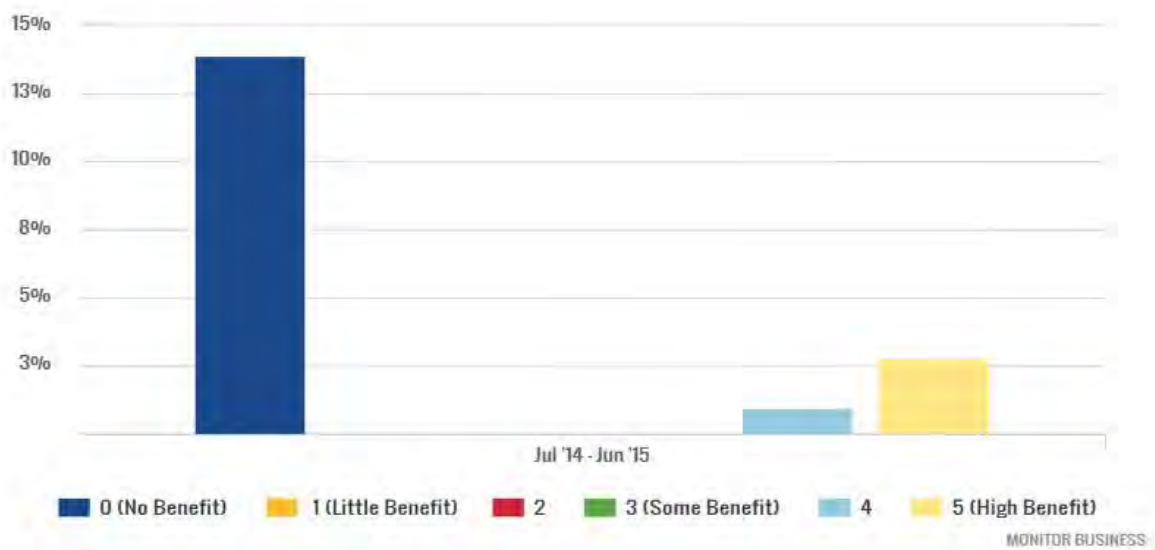
Storage Space

	Jul 2014 / Jun 2015
0 (No Benefit)	19%
1 (Little Benefit)	9%
3 (Some Benefit)	8%
5 (High Benefit)	6%
2	2%
4	1%



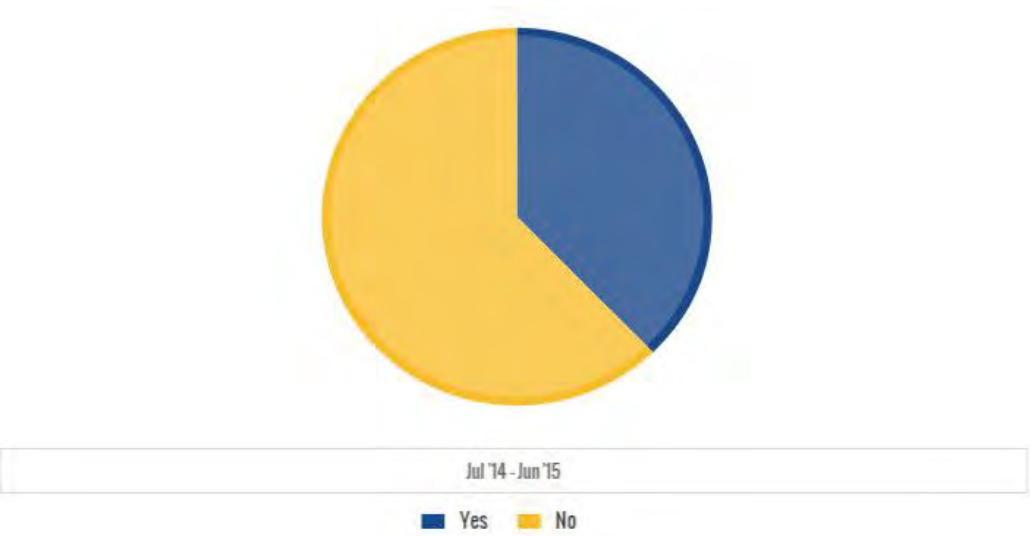
Other

	Jul 2014 / Jun 2015
0 (No Benefit)	14%
5 (High Benefit)	3%
4	1%
1 (Little Benefit)	0%
3 (Some Benefit)	0%
2	0%



Q5. Does your business employ staff?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	61%
Yes	37%



Q6. How many people were employed by your business at the start of the Financial Year (1 July last year), and then at the end of the Financial Year (30 June this year)?

AVERAGE PER RESPONDENT

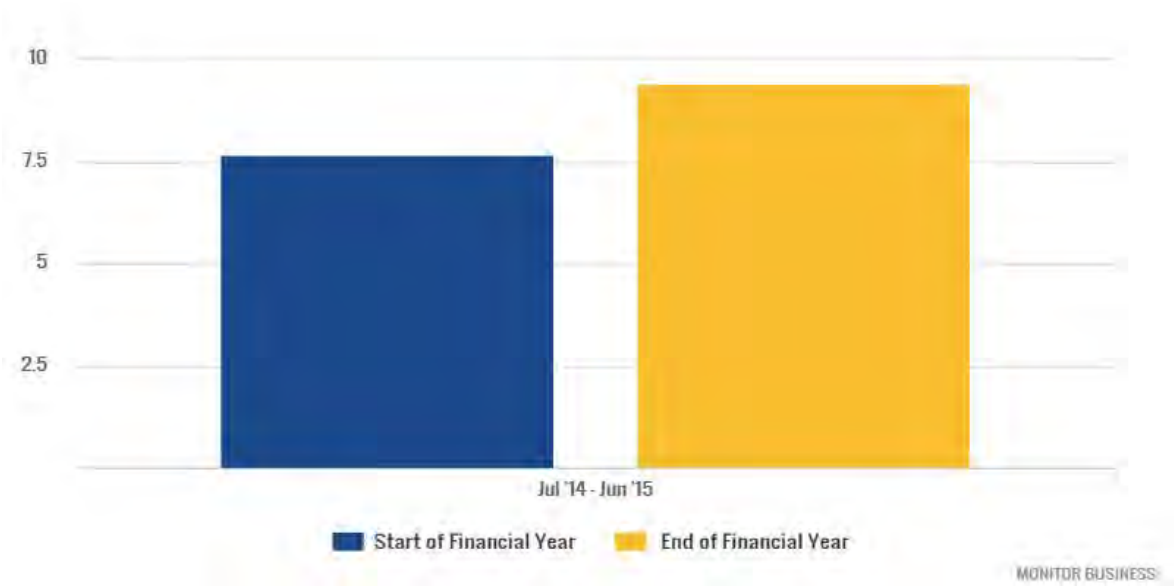
Full Time

	Jul 2014 / Jun 2015
End of Financial Year	14
Start of Financial Year	12



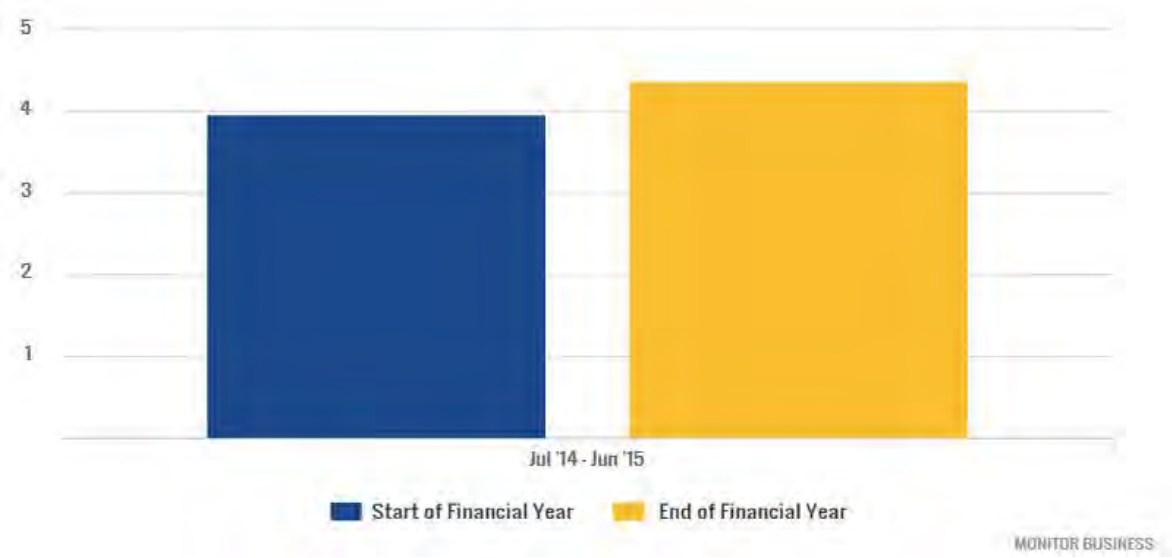
Part Time

	Jul 2014 / Jun 2015
End of Financial Year	9
Start of Financial Year	8



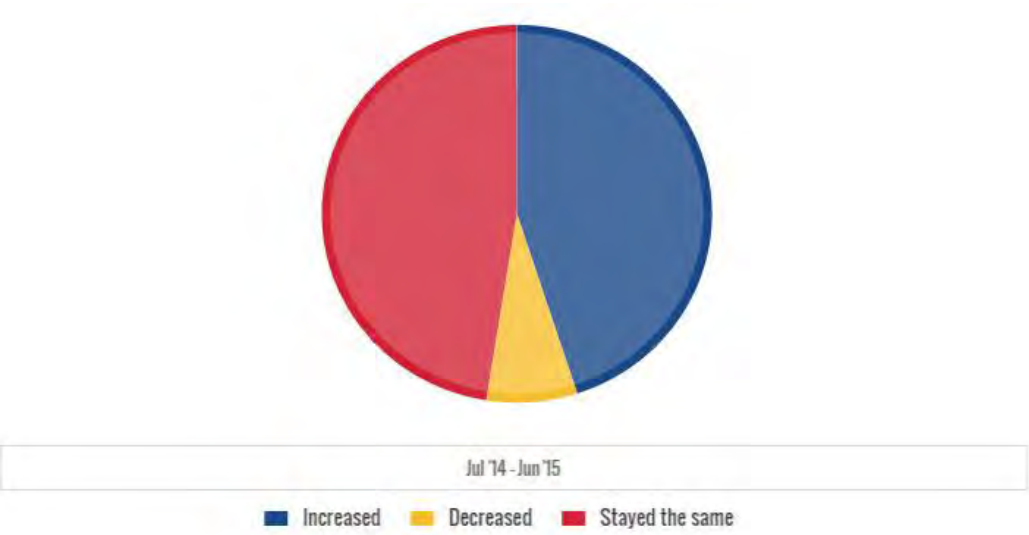
Casual

	Jul 2014 / Jun 2015
End of Financial Year	4
Start of Financial Year	4



Q7. By the end of the next financial year, do you expect the number of employees to have:
 AVERAGE PER RESPONDENT

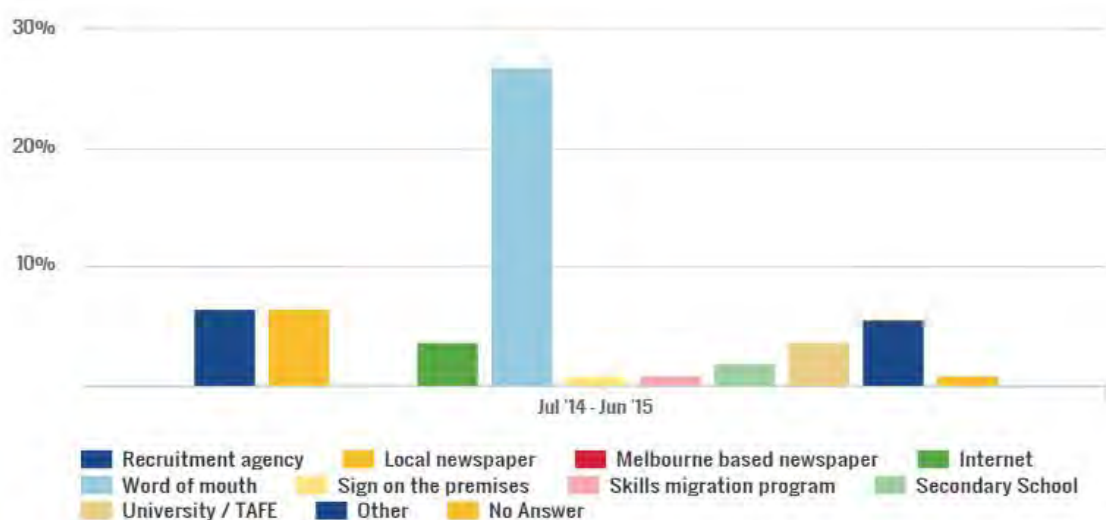
	Jul 2014 / Jun 2015
Stayed the same	18%
Increased	17%
Decreased	3%



Q8. Where do you recruit your employees from?

AVERAGE PER RESPONDENT

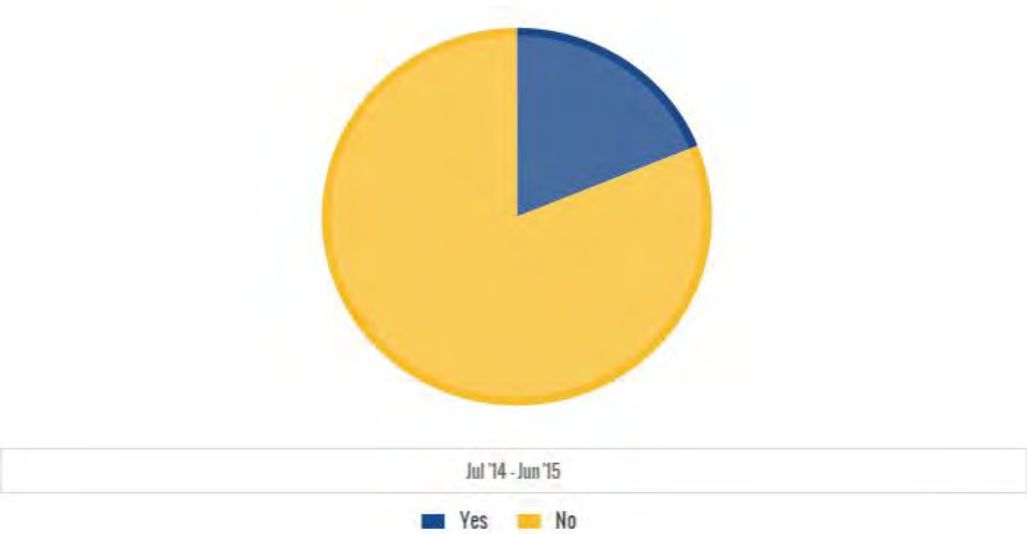
	Jul 2014 / Jun 2015
Word of mouth	27%
Local newspaper	6%
Recruitment agency	6%
Other	6%
University / TAFE	4%
Internet	4%
Secondary School	2%
Skills migration program	1%
Sign on the premises	1%
No Answer	1%
Melbourne based newspaper	0%



MONITOR BUSINESS

Q9. Have you had any difficulty in recruiting staff?
AVERAGE PER RESPONDENT

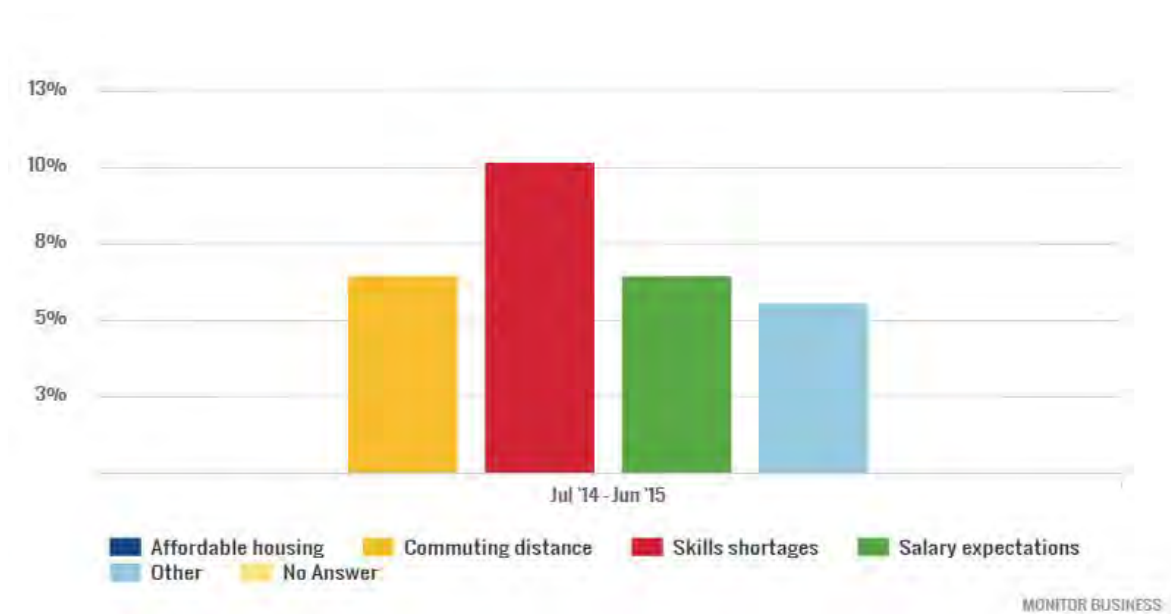
	Jul 2014 / Jun 2015
No	80%
Yes	19%



Q10. What are the main reasons for this difficulty?

AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Skills shortages	10%
Salary expectations	6%
Commuting distance	6%
Other	6%
Affordable housing	0%
No Answer	0%



Q11. Please specify any specific skills shortages which related to your ability to recruit staff:
AVERAGE PER RESPONDENT

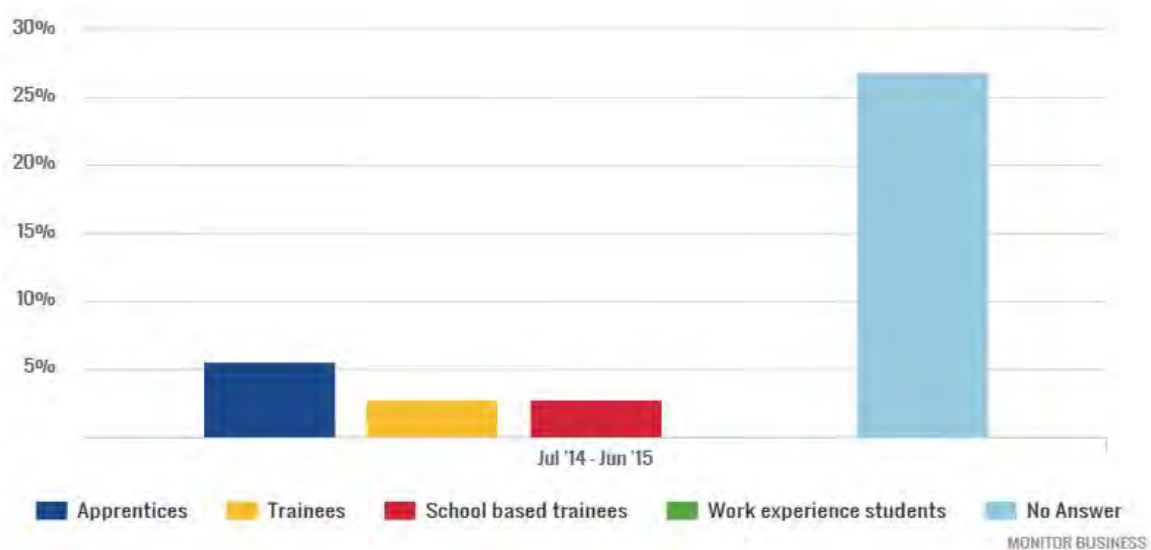
Trending Keywords

Training	Experience	Staff	Skills
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Q12. Are any of your employees:

AVERAGE PER RESPONDENT

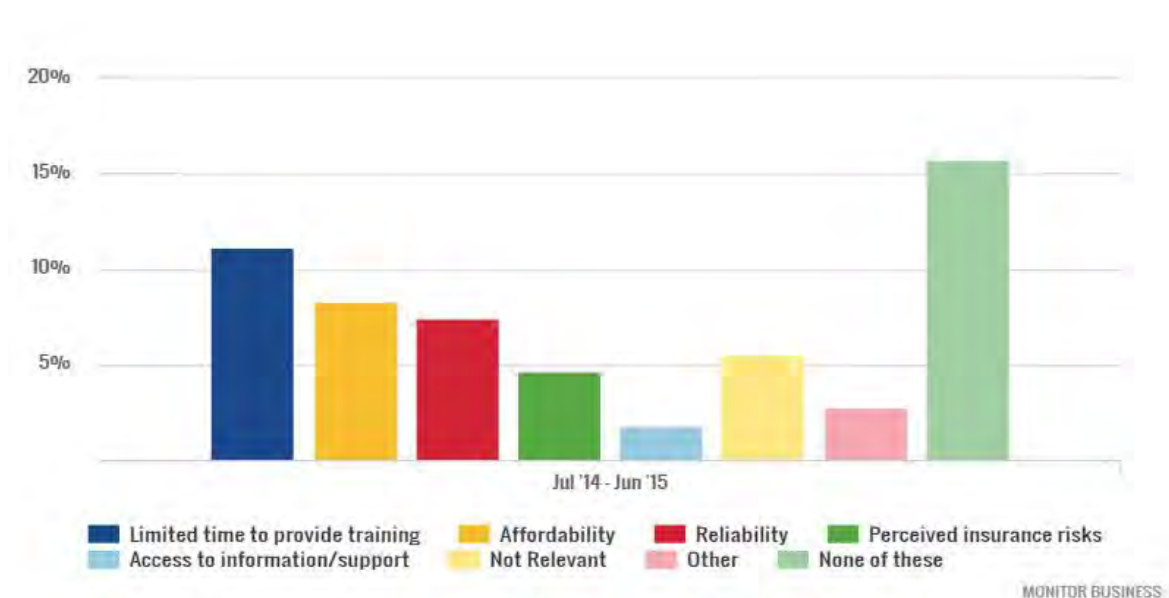
	Jul 2014 / Jun 2015
No Answer	27%
Apprentices	6%
Trainees	3%
School based trainees	3%
Work experience students	0%



Q13. What are the barriers, if any, to employing the above?

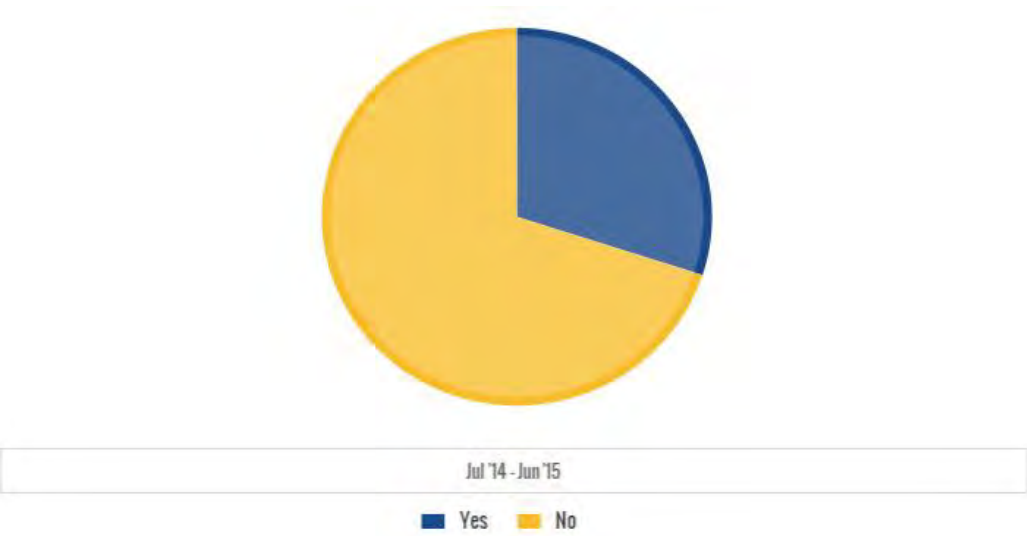
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
None of these	16%
Limited time to provide training	11%
Affordability	8%
Reliability	7%
Not Relevant	6%
Perceived insurance risks	5%
Other	3%
Access to information/support	2%



Q14. If you employ staff, do you use local training providers?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	26%
Yes	11%



Q15. Why do you choose not to use local training providers?
AVERAGE PER RESPONDENT

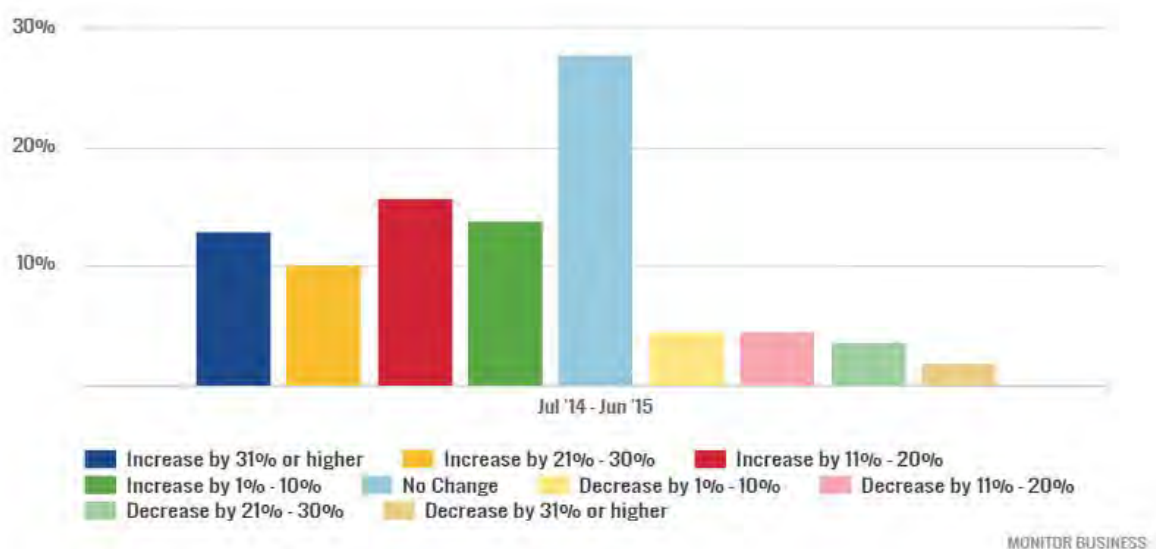
Trending Keywords

Training	Staff	Business	Company
Own	None		

Q16. What do you estimate the change in your Gross Business Income (turnover) was for the current financial year compared with the previous financial year (previous)?

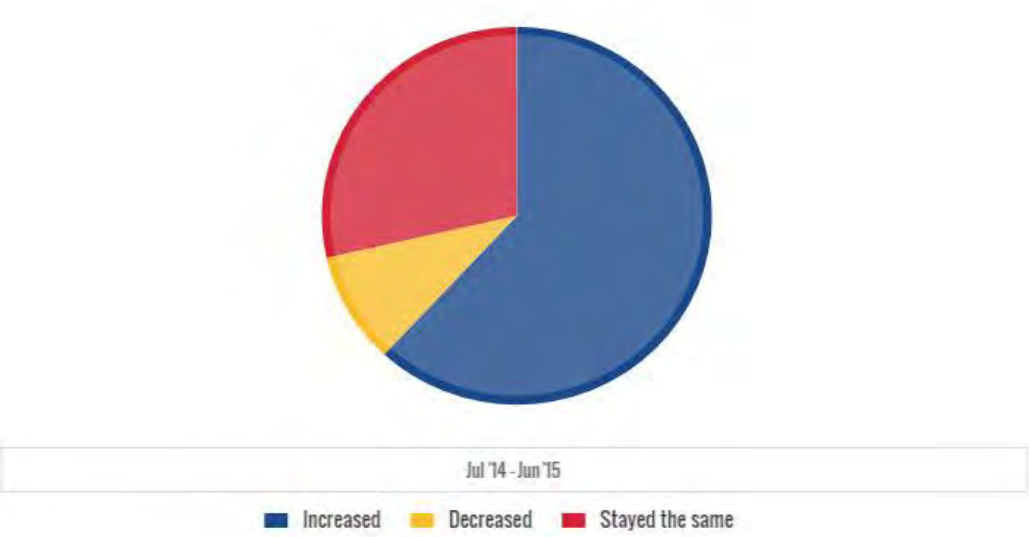
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No Change	28%
Increase by 11% - 20%	16%
Increase by 1% - 10%	14%
Increase by 31% or higher	13%
Increase by 21% - 30%	10%
Decrease by 1% - 10%	5%
Decrease by 11% - 20%	5%
Decrease by 21% - 30%	4%
Decrease by 31% or higher	2%



Q17. By the end of the next financial year, do you expect your Gross Business Income to have:
 AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Increased	60%
Stayed the same	28%
Decreased	9%



Q18. What initiatives did your business undertake in the past 12 months to improve performance?

AVERAGE PER RESPONDENT

Trending Keywords

Business	New	More	Advertising
Training	Staff	Networking	Marketing
Media	Social	Increased	Local
Online	Presence	None	Improve
Website	Area	Market	Work
Personal	Based	Taking	Service
Clients	Customer	Increase	Services
Good			

Q19. What initiatives did your business plan to undertake in the next 12 months to improve performance?

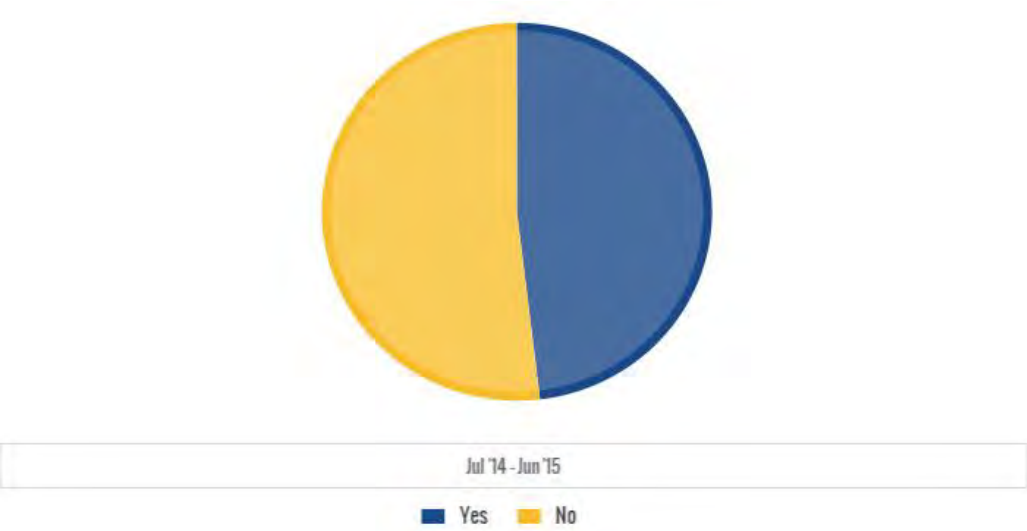
AVERAGE PER RESPONDENT

Trending Keywords

Continue	Advertising	Website	Business
Increase	Training	More	Work
Marketing	Development	Networking	Further
New	Staff	Above	None
Services	Local	Advertise	Online
Continued	Opportunities	Companies	Products
Product	Working	Consider	Professional
Same			

Q20. Are you planning to expand your business in the next 12 months?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	51%
Yes	47%



Q21. What are the main constraints to growing your business?
AVERAGE PER RESPONDENT

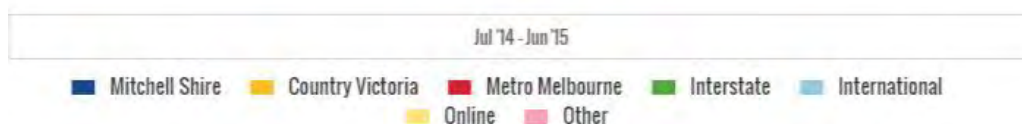
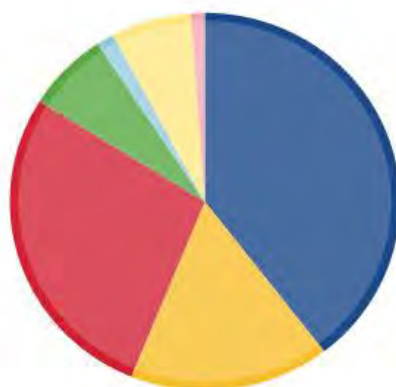
Trending Keywords

Money	Work	Business	Constraints
Local	Costs	Cost	Commitments
Lack			

Q22. What percentage of your business income is generated from:

AVERAGE PER RESPONDENT

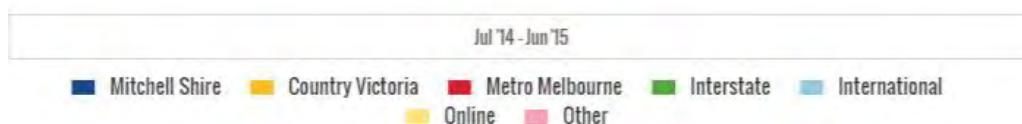
	Jul 2014 / Jun 2015
Mitchell Shire	40%
Metro Melbourne	28%
Country Victoria	17%
Interstate	7%
Online	7%
International	1%
Other	1%



Q23. Which of these markets do you expect to grow the most in the next 2 years?

AVERAGE PER RESPONDENT

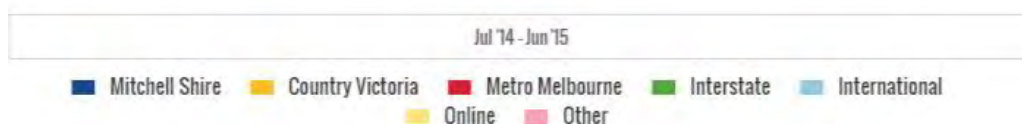
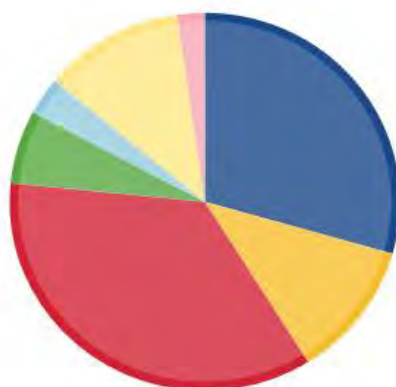
	Jul 2014 / Jun 2015
Mitchell Shire	32%
Metro Melbourne	19%
Country Victoria	18%
Online	10%
Interstate	6%
International	5%
Other	3%



Q24. What percentage of your business relies on products and services from?

AVERAGE PER RESPONDENT

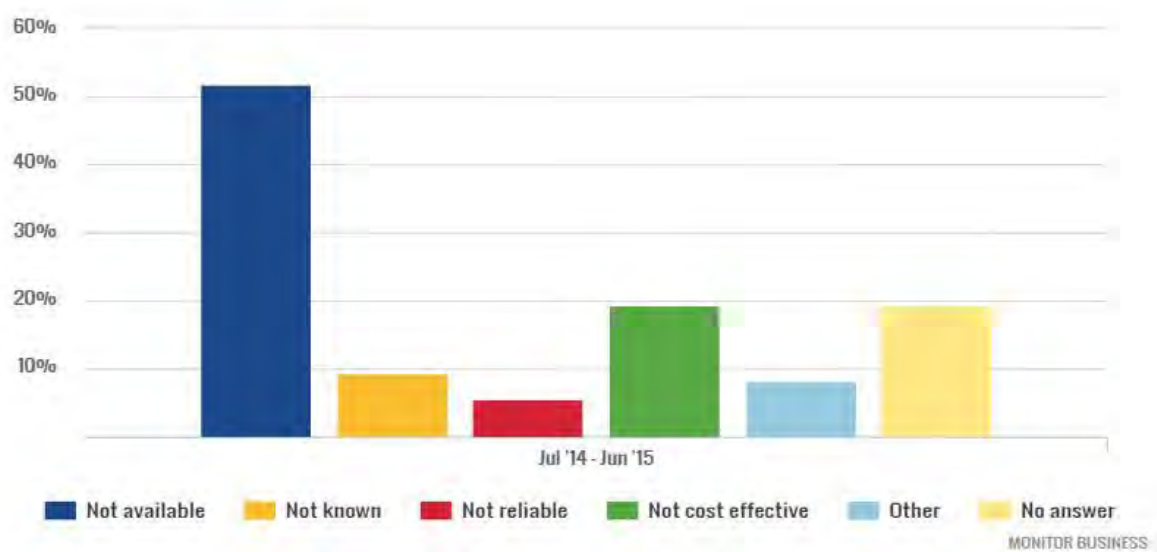
	Jul 2014 / Jun 2015
Metro Melbourne	35%
Mitchell Shire	29%
Online	12%
Country Victoria	12%
Interstate	6%
International	3%
Other	2%



Q25. If you don't use suppliers located within Mitchell Shire, why not?

AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Not available	52%
No answer	19%
Not cost effective	19%
Not known	9%
Other	8%
Not reliable	6%



Q26. What are the specific gaps in products and services available locally that prevent your business from using local suppliers (if any)?

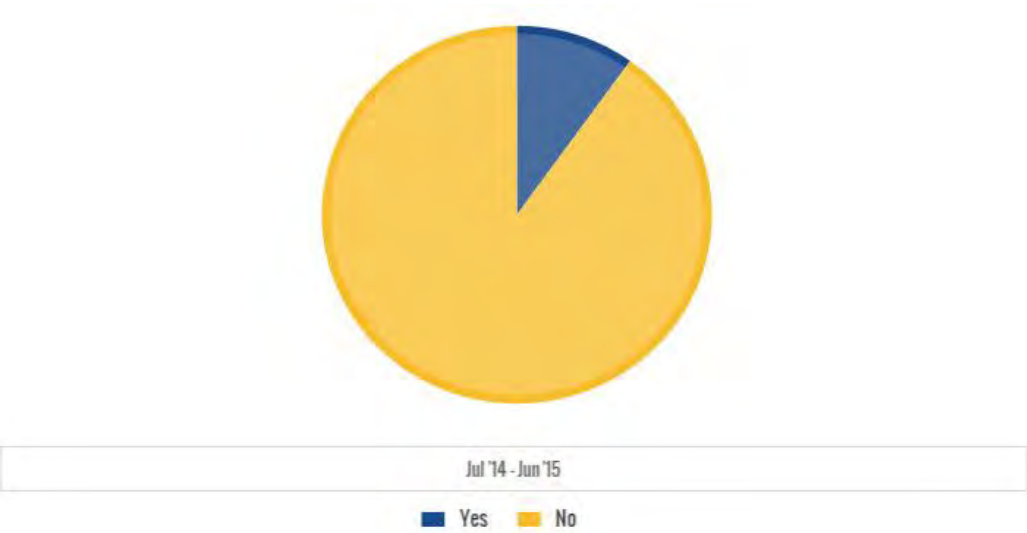
AVERAGE PER RESPONDENT

Trending Keywords

Products	Suppliers	Services	Available
Locally	Business	Local	Internet
Shire	Equipment	Supplies	Here
One	Within	None	Area
Cost	Na	Product	Access
High	Range	Stationary	

Q27. If your business is not currently exporting, are you interested in doing so in the future?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	76%
Yes	8%



Q28. If you trade internationally, please list the countries that your business exports to:
AVERAGE PER RESPONDENT

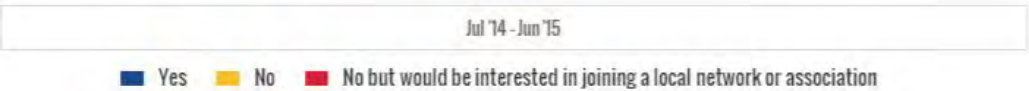
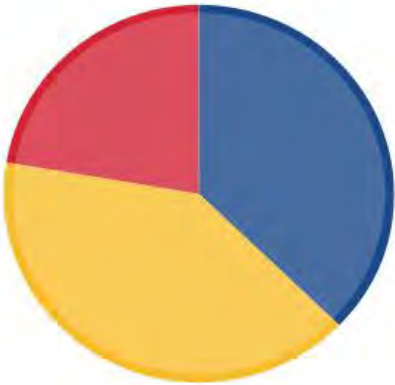
Trending Keywords

China	UK	USA
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Q29. Is your business currently a member of any local or industry networks or associations?

AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	35%
Yes	32%
No but would be interested in joining a local network or association	19%



Q30. If your business is currently a member of any local or industry networks or associations, what are they?
AVERAGE PER RESPONDENT

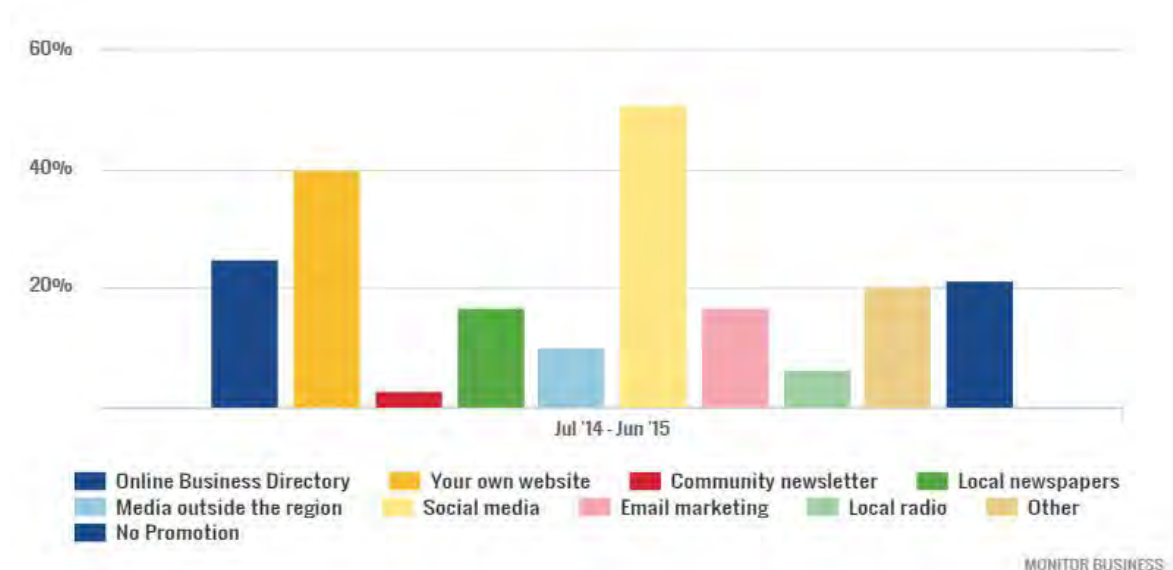
Trending Keywords

Association	Australia	KGB	Australian
Kilmore	Chamber	Business	

Q31. Which media do you currently use to promote your business?

AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Social media	51%
Your own website	40%
Online Business Directory	25%
No Promotion	21%
Other	20%
Local newspapers	17%
Email marketing	17%
Media outside the region	10%
Local radio	6%
Community newsletter	3%



Q32. If you promote your business using social media, please list the main social media platforms you use (up to 10):

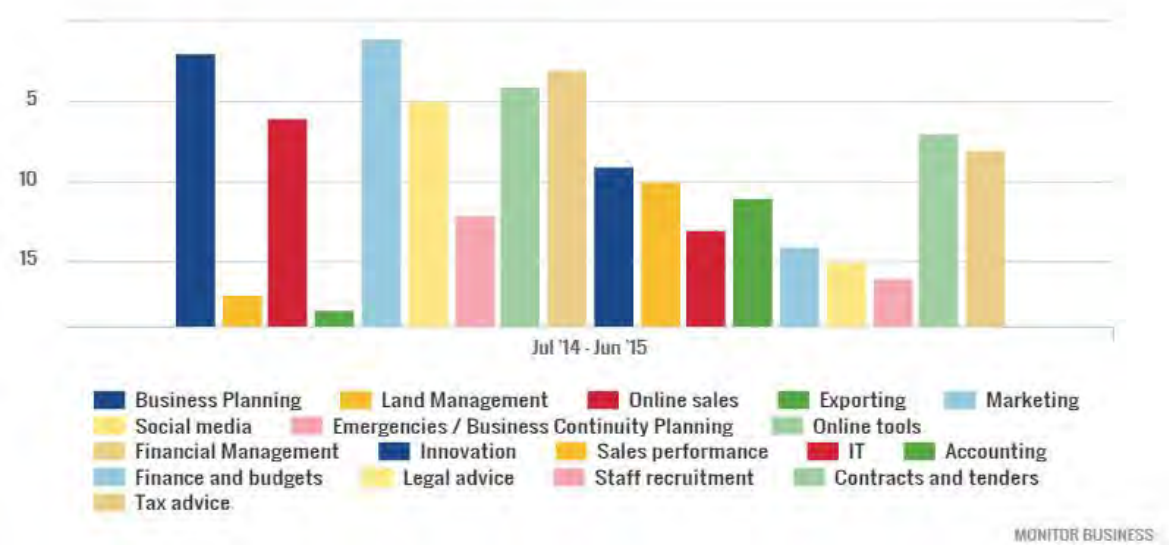
AVERAGE PER RESPONDENT

Trending Keywords

Facebook	LinkedIn	Twitter	Google
Instagram			

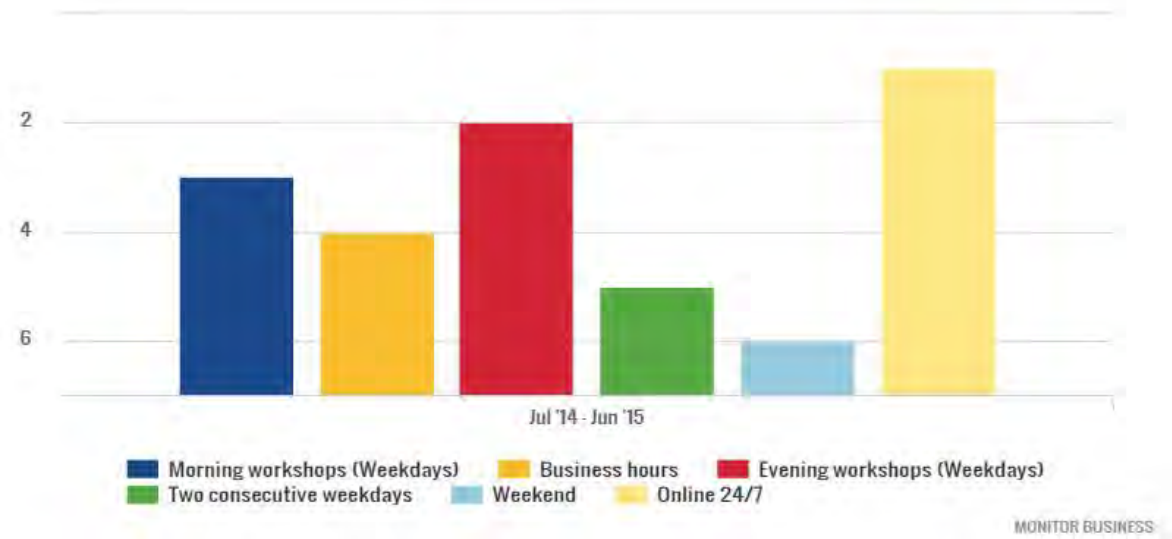
Q33. Please rank from 1 to 5 the top five business development topics that would you like training or professional development in
 AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015	
1	2	3



Q34. Please rank from 1 to 6 when is your best time/day for training?
 AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015	
1	2	3



Q35. What are the high level business issues or opportunities that Mitchell Shire Council could be advocating for or providing to support the local economy?

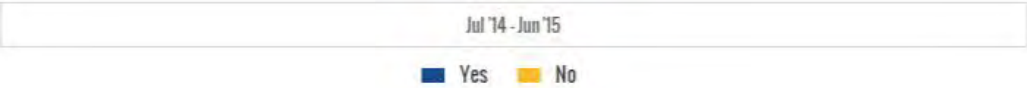
AVERAGE PER RESPONDENT

Trending Keywords

Business	Local	Shire	Should
Support	Development	More	Services
Within	Businesses	Small	Need
Community	Been	Growth	Rates
Mitchell	Opportunities	Permits	Area
Planning	Internet	Interest	Opportunity
Offer	Tourism	NBN	Employment
Those			

Q36. Is your business located in Seymour?
AVERAGE PER RESPONDENT

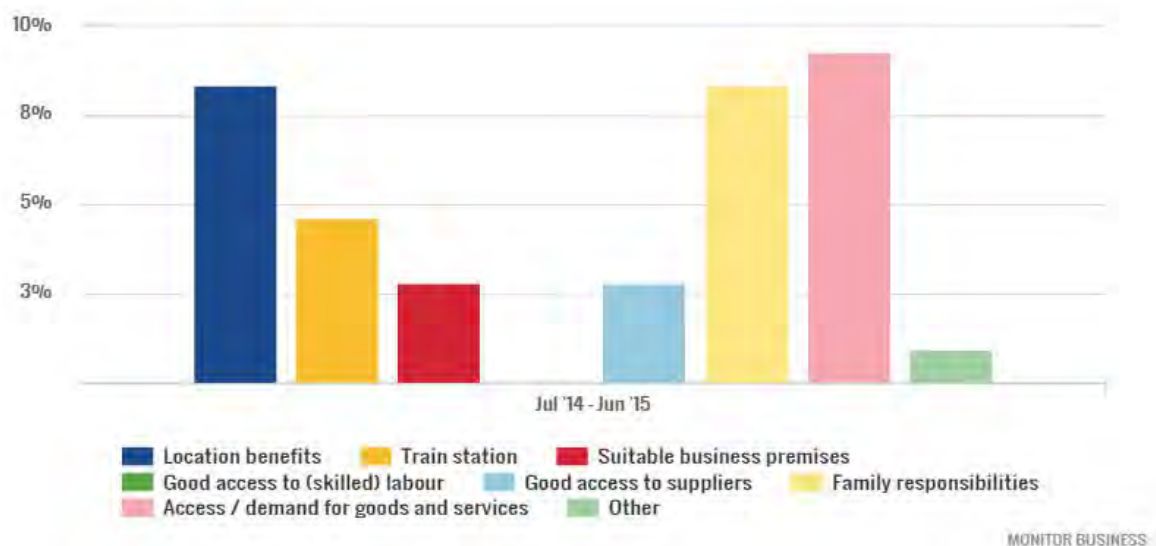
	Jul 2014 / Jun 2015
No	72%
Yes	15%



Q37. What are the advantages of being located in Seymour for your business?

AVERAGE PER RESPONDENT

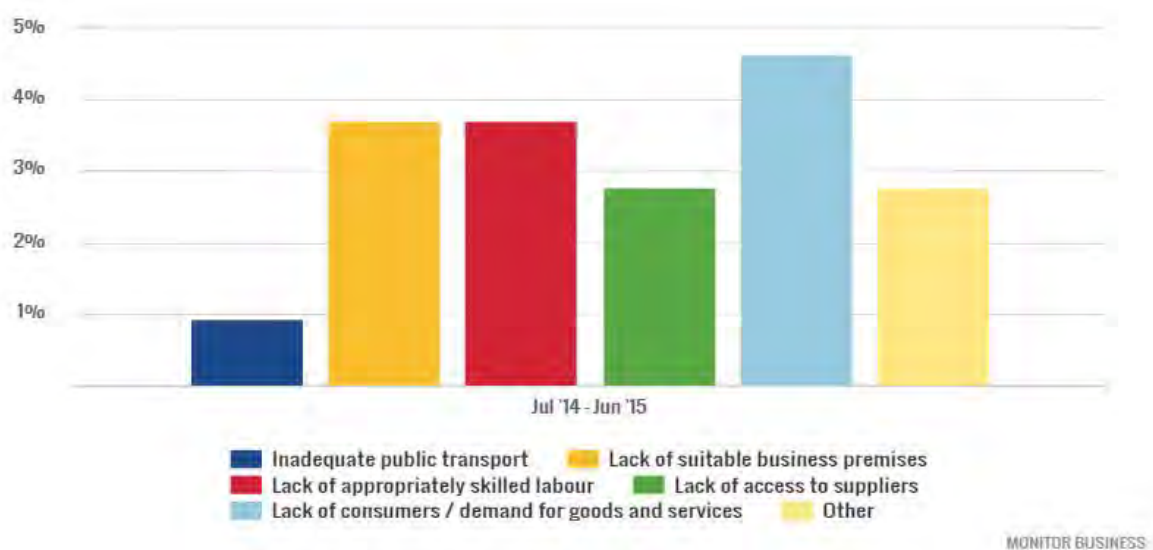
	Jul 2014 / Jun 2015
Access / demand for goods and services	9%
Location benefits	8%
Family responsibilities	8%
Train station	5%
Suitable business premises	3%
Good access to suppliers	3%
Other	1%
Good access to (skilled) labour	0%



Q38. What are the disadvantages of being located in Seymour for your business?

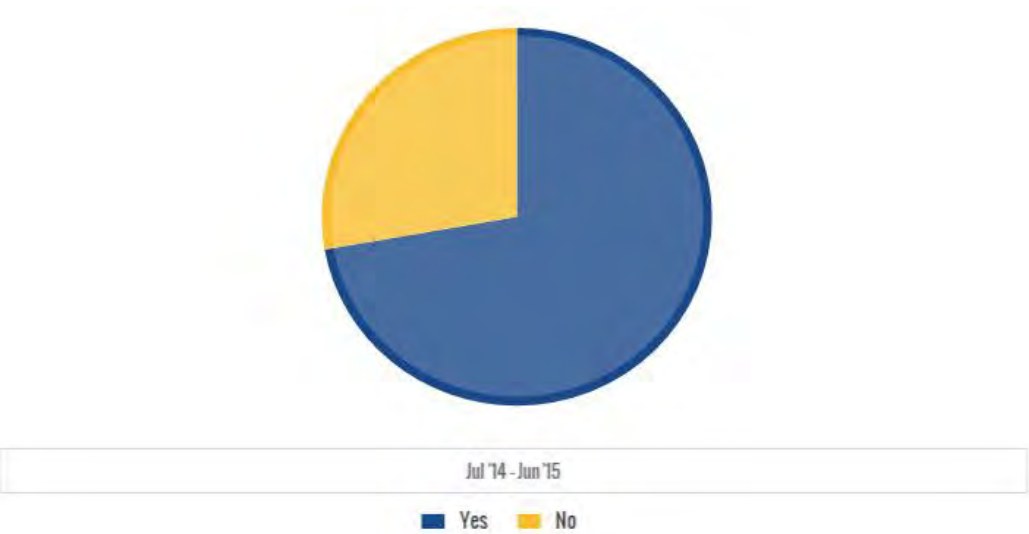
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Lack of consumers / demand for goods and services	5%
Lack of suitable business premises	4%
Lack of appropriately skilled labour	4%
Other	3%
Lack of access to suppliers	3%
Inadequate public transport	1%



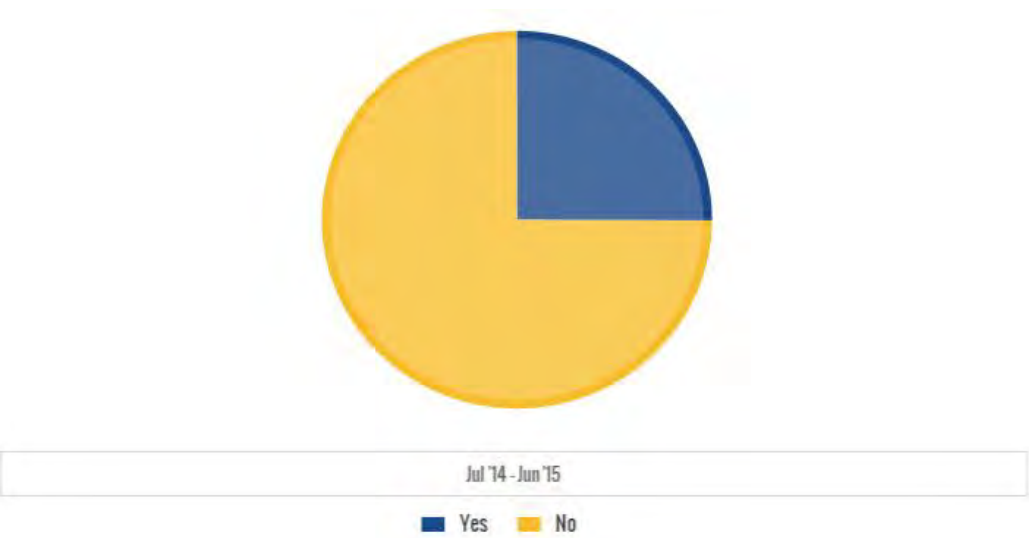
Q39. Is your current business premises suited to the needs of your business?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Yes	12%
No	5%



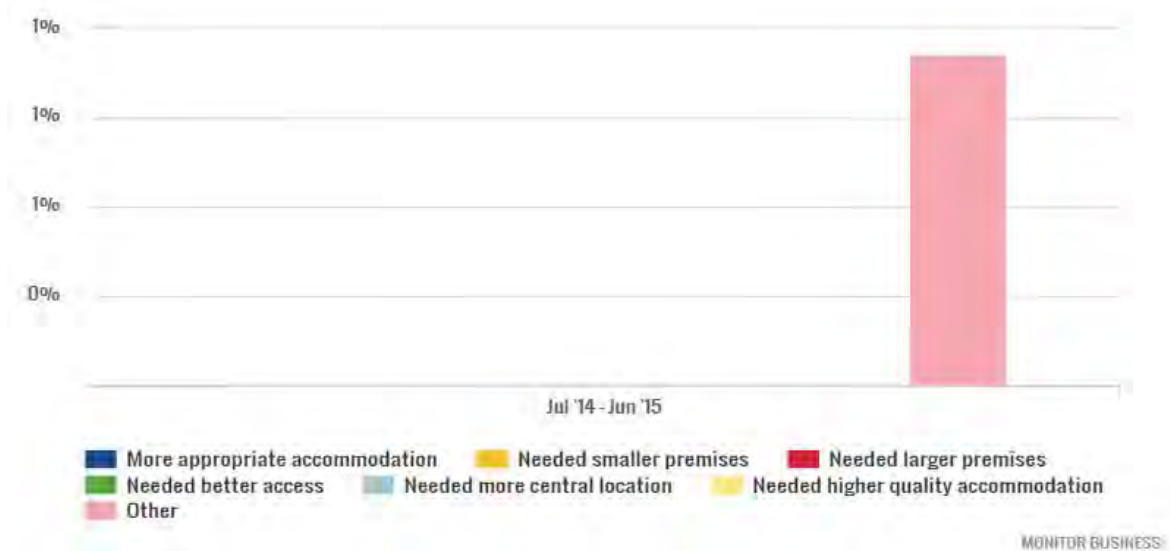
Q40. Have you sought alternative business premises in the last five years within Seymour?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	3%
Yes	1%



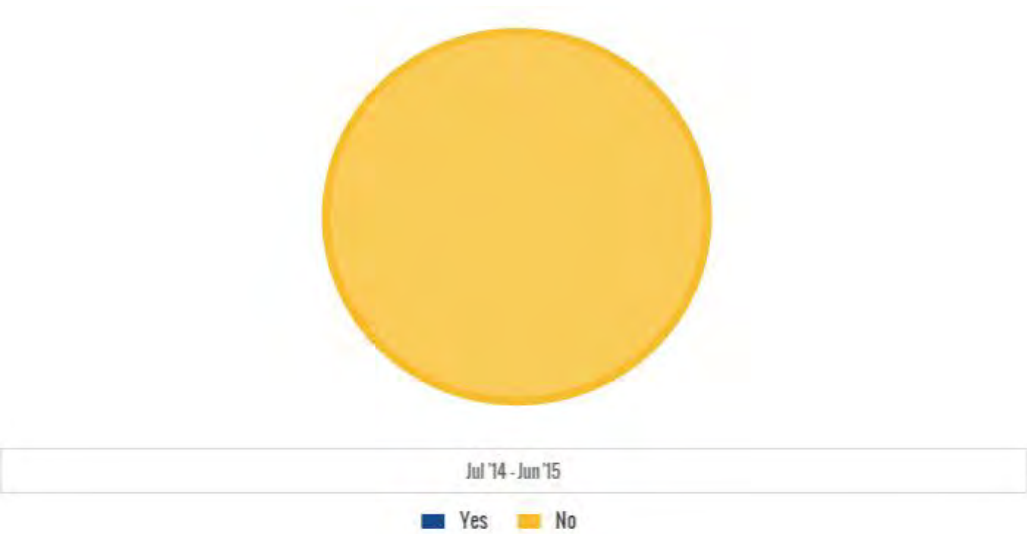
Q41. If you have sought alternative business premises in the last five years within Seymour, why?
 AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Other	1%
Needed more central location	0%
Needed smaller premises	0%
More appropriate accommodation	0%
Needed larger premises	0%
Needed higher quality accommodation	0%
Needed better access	0%



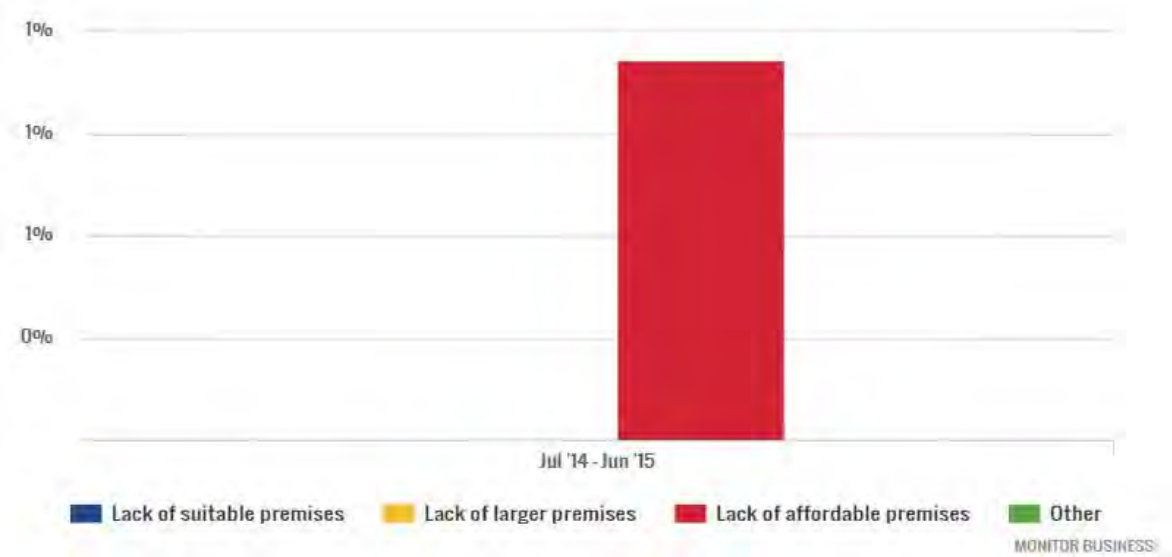
Q42. Were you successful in finding alternative business premises?
AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
No	1%
Yes	0%



Q43. If you were not successful in finding alternative business premises, why?
 AVERAGE PER RESPONDENT

	Jul 2014 / Jun 2015
Lack of affordable premises	1%
Lack of suitable premises	0%
Lack of larger premises	0%
Other	0%



Q44. Please add any other comments here

AVERAGE PER RESPONDENT

Trending Keywords

Business	Council	Small	Seymour
Does	Work	Local	Shire
Tourism	Being	Question	Services
Survey	Town	Hard	Opportunity
Businesses	Based	Further	Years
Kilmore	Im		



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APPENDIX B CONSULTATION SCHEDULE AND SUMMARY

WORKSHOPS - 4

- Mitchell Shire Economic Development and Strategic Planning officers workshop – 24/11/2015 – Attendees - 5
- Seymour business workshop – 25/11/2015 – Attendees – 2;
- Kilmore business workshop – 1/12/2015– Attendees – 8;
- Wallan business workshop – 2/12/2015 – Attendees – 7; and
- Broadford business workshop – 3/12/2015 – Attendees – 3.

*Urban Enterprise attended the Seymour Structure Plan Community Workshop and the Seymour Community Groups Workshop (Seymour We Want, Sustainable Seymour, BEAM – Mitchell Environment Group, Beyond Zero Emissions)

ONE-ON-ONE MEETINGS - 13

- Ralphs Meats – Johnathan Ralph (Director) – 1/12/2015;
- Goulburn River Valley Tourism – Wendy Jones (Executive Officer) and Caolan O'Connor (Tourism Officer) – 1/12/2015;
- Goulburn Murray Credit Union – David Drummond (Manager, Seymour branch) – 1/12/2015;
- Seymour Racecourse – Penny Reeve – 2/12/2015;
- Goulburn River Tourist Park – Olivia Johnstone – 2/12/2015;
- Mangalore Airport and Moorabin Flight Training Academy – Joe Gagola (General Manager, Mangalore Airport) and Andrew Wagner (Operations manager, MFTA) – 2/12/2015;
- Regional Development Victoria – Kim Chadband (Senior Business Development Officer) – 2/12/2015;
- Crystal Group – Wally Mott (Director) – 3/12/2015;
- Farmer, Broadford – Henry Marszalek – 3/12/2015;
- Seymour Agricultural & Pastoral Society – Jason Ronald (President) and Gay Lewis (Vice President)– 8/12/2015
- Puckapunyal Army Base – Lieutenant Colonel Andrew Abbot (Commanding Officer/Chief Instructor) – 8/12/2015;
- Nestle (phone meeting); and
- Graeme Brennan (phone meeting).

