

ECONOMIC DEVELOPMENT STRATEGY

VERSION 2.0 / 2016-2022

“TO ENSURE A DIVERSE AND SUSTAINABLE ECONOMY BY CONNECTING OUR PEOPLE AND BUSINESSES TO ONE ANOTHER AND TO MARKETS; BY STRENGTHENING EXISTING INDUSTRIES; AND BY ENSURING WELLINGTON IS WELL-PLACED TO TAKE ADVANTAGE OF NEW OPPORTUNITIES.”

[ECONOMIC DEVELOPMENT STRATEGY VISION]

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This document should be read in conjunction with the Economic Development Strategy Action Plan, available for download on Wellington Shire Council’s website.

EXECUTIVE SUMMARY

Wellington Shire Council has a far-sighted vision for the Shire's economy. This vision is encapsulated in Wellington 2030 Strategic Vision and complements the Gippsland Regional Plan. This Economic Development Strategy (the 'Strategy') will guide the Shire in helping to grow and develop the economy over the next six years.

About Wellington

- Relative to other parts of rural Victoria, Wellington's economy is strong and diverse in well-established major industries including agribusiness, defence, oil and gas, public administration and health.
- These industries combined employ around 60% of the workforce and form the basis of Wellington's robust and stable economy.
- These industries produce considerable flow-on benefits to the rest of the economy.
- In terms of liveability and amenity, Wellington is well placed. This is a critically important strength for Wellington as demand for urban amenity (e.g. health services, public transport and arts) in rural Victoria continues to grow.

Challenges and Opportunities

- There are expanding domestic and international markets for food and fibre including innovation in food processing; scope to expand into new economy activities leveraging from the NBN; further growth in manufacturing; and promise in the growing number of visitors to the Shire.
- Liveability, education and quality local amenities are also valuable assets in attracting and retaining the essential skilled labour required to sustain the oil and gas industry. As many stakeholders have said, once people move to Wellington, they appreciate the quality of life here. Amenity and connectivity, therefore, play important roles in Wellington's economic prospects.
- A common theme to the strategic objectives and recommended actions is better connectivity. That is, improved road and rail links; high speed broadband; connecting ideas between businesses; and connecting the messages about Wellington to a larger audience.
- The development of clear messages, branding and marketing strategies that promote visiting, living and investing in Wellington Shire will provide opportunities to grow visitor numbers and population growth.

ABOUT THIS STRATEGY

The Strategy is made up of three, two-year phases, each with a unique Action Plan that emphasises particular themes (Figure A).

PHASE 1 2016-18

- Assemble baseline evidence
- Improve connectivity
- Continue to embrace digital economy
- Continue current program of activities
- Build networks and partnerships
- Leverage from current major investments

PHASE 2 2018-20

- Evaluate progress
- Set new performance indicators
- Identify new focus industries

PHASE 3 2020-22

- Evaluate progress
- Set new performance indicators
- Identify strategic objectives for next Economic Development Strategy

[Figure A - The Phases of the Strategy]

ABOUT THIS STRATEGY

Phase 1 of the Strategy outlines 44 actions across five strategic objectives: economic diversity, amenity and infrastructure, leadership and governance, skills and education and branding. The objectives and actions reflect Wellington's distinctive economic strengths, particularly economic diversity and liveability (Figure B).

OUR 5 STRATEGIC OBJECTIVES

[Figure B - The Five Strategic Objectives]

1 ECONOMIC DIVERSITY

Ensuring we can leverage from our existing industries and assets to diversify the economy through value-adding activity.

2 AMENITY & INFRASTRUCTURE

Ensuring sufficient investment in critical infrastructure to support current activity, attract new investment and attract and service residents.

3 LEADERSHIP & GOVERNANCE

Ensuring reliable, up-to-date information, and the right formal and informal structures, partnerships and people in place are working together to help develop the economy.

4 SKILLS & EDUCATION

Continuing to improve our skills base in response to changing market needs.

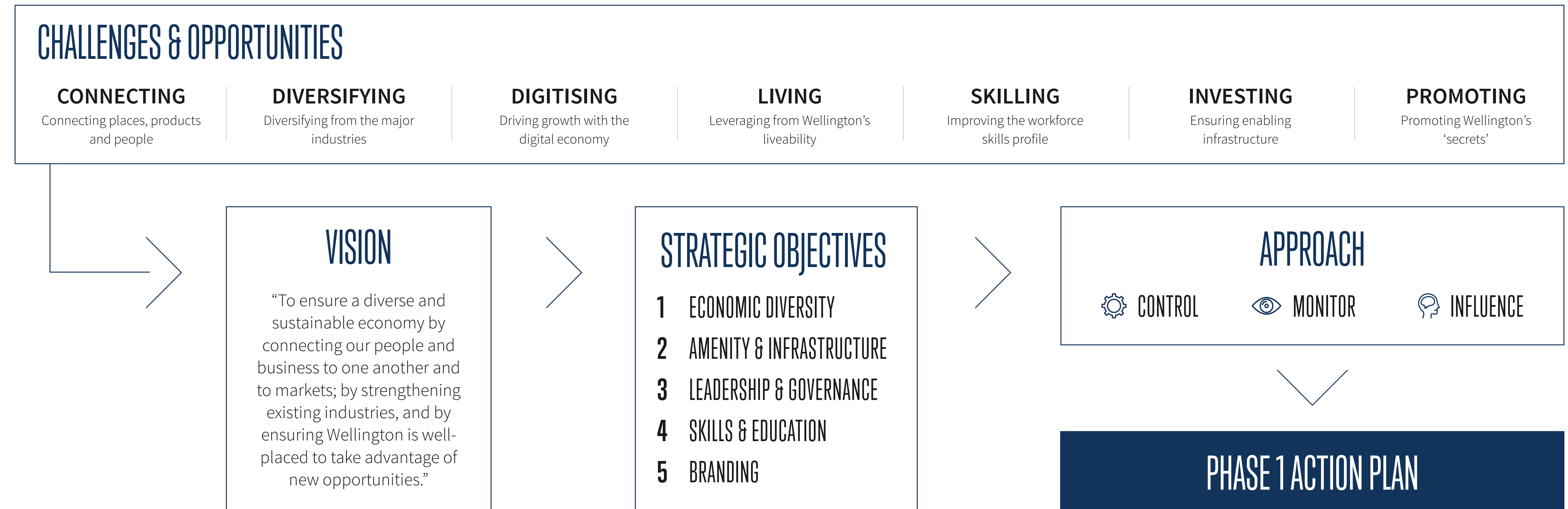
5 BRANDING


Promoting and celebrating Wellington's strengths.

As with all economies, Wellington's industries are integrated, sharing labour pools, infrastructure and communication channels. Consequently, the strategic objectives are intentionally not industry specific.

ABOUT THIS STRATEGY

The strategic objectives synthesise all of the priority concerns and interests that the business community, the Council and the evidence have pointed to. Figure C describes the pathway from the challenges and opportunities to the Action Plan.



The background is a collage of eight industrial food processing scenes, all tinted in a deep blue color and arranged in a 2x4 grid. The scenes include: workers in a facility, long conveyor belts, a large hopper pouring material, a worker in a white protective suit, and various trays and containers filled with food products.

1

BACKGROUND

BACKGROUND

Introduction

The Wellington Shire Council's Economic Development Strategy (the 'Strategy') sets out the key issues, strategic objectives, and action plan that are Council's roadmap to ensuring Wellington's economy stays strong, continues to diversify and is aligned with the aspirations of the Shire's people and businesses.

When compared with other parts of rural Victoria, Wellington has significant advantages. It has well-established, stable, export-orientated and increasingly diverse industries. Much of the economic stability has come from strong primary industries (agribusiness, oil and gas). In turn these have provided important opportunities in secondary sectors such as manufacturing and food processing. Along with growth in existing industries such as defence and health, new investment, innovation and technology is helping to diversify and further strengthen the economy.

However, the global economy is changing rapidly and competition is fierce. The Shire recognises the risks in taking a 'business as usual' approach and has prepared a Strategy that emphasises, in equal measure, leadership, adaptability and a clear strategic direction.



BACKGROUND

Local Economic Development and the Role of Local Government

“The purpose of local economic development is to build up the economic capacity of a local area to improve its economic future and the quality of life for all. It is a process by which public, business and non-governmental sector partners work collectively to create better conditions for economic growth and employment generation.”

- The World Bank

Given the rapid change in our economy, it is now well understood that all three levels of government must contribute to ensuring our economies are resilient. In fact, Victorian local governments are national leaders in local economic planning and, in Victoria, economic development strategies are important local government policy documents.

A ‘strategy’ represents a commitment to a long-term pathway and goal. It is defined by a vision, shared by all stakeholders; composed of a set of strategic objectives; and enabled through a short-term action plan with a clear time frame.

An economic development strategy cannot be a rigid rule book. It must be responsive to change;

emphasise collaboration; encourage some experimentation; and, mostly importantly, it must match the capabilities of the Council and its stakeholders.

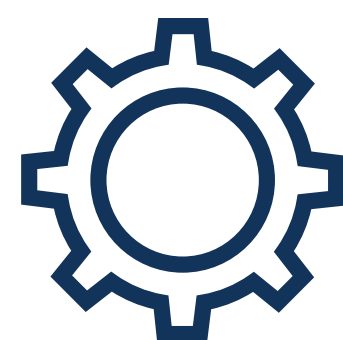
Nor is an economic development strategy an investment prospectus. It is a guide for helping to shape the economy and, as such it must recognise both the strengths and the weaknesses of the economy. Actions can then be outlined that will play to the strengths and address the weaknesses.

This Strategy embodies these principles. It has a six-year timeline, with a two-year action plan that starts Wellington on a pathway towards its economic vision.

BACKGROUND

Council can Control, Influence or Monitor

Local economic development is a partnership and there are varying degrees of responsibility for Councils. In Wellington's case, the Council has acknowledged three broad roles:



CONTROL

Where Council has direct control on the result. For example, a council grants program.



INFLUENCE

Where Council can influence the result, but other external factors also have an impact. For example, advocating to State Government for infrastructure funding.



MONITOR

Where Council has no influence on the result, but by monitoring, can assist in future planning. For example, collecting and analysing employment data.

The action plan identifies each action according to these three roles.

BACKGROUND

Building on Earlier Work

This Strategy is informed by earlier work, particularly the two key documents: Wellington 2030 Strategic Vision; and the Gippsland Regional Plan (GRP). Both of these outline economic visions, objectives and, in the case of the GRP, a set of actions.

Wellington 2030 Strategic Vision

Wellington 2030 Strategic Vision outlines nine visions for Wellington for the natural environment; transport and roads; population; development; wellbeing and safety; culture; liveability; the Council; and the economy. The economic vision is that, by 2030:

“Wellington has a diverse and sustainable economy. Existing industries have been supported and strengthened and we have actively sought and developed new business opportunities. Our economy generates wealth that remains in the Shire and provides employment for our people.”

This will be achieved by focusing on specific industries, assets and approaches, including:

- Advocating for water supply security;
- Marketing Wellington as a lifestyle and tourism destination;
- Attract and retain a skilled workforce through good access to higher and vocational education;
- Encouraging the expansion of export industries;
- Supporting future RAAF Base expansion;
- Encouraging the growth of retail;
- Supporting long-term initiatives for the Indigenous community;
- Planning and advocating for supporting infrastructure, including telecommunications, land, tourism facilities and reticulated gas; and
- Attracting new businesses including higher education providers, enterprises adding value to natural resources, aeronautics and tourism.

This Strategy adapts Wellington 2030’s economic vision and reflects similar priorities.

BACKGROUND

The Gippsland Regional Plan

The Gippsland Regional Plan (GRP) is based on four strategic themes. As with the Wellington 2030 Strategic Vision, this Strategy reflects many of the objectives, priorities and issues in the GRP, particularly in relation to infrastructure, value-adding and connectivity.

Economic Prosperity	Education and Community Wellbeing	Natural Environment Stewardship	Connectivity
<i>Gippsland’s natural resources should be the basis upon which employment and exports are increased</i>	<i>Raising educational attainment by identifying and addressing barriers to tertiary participation.</i>	<i>Sustainable development of natural and built environment</i>	<i>Improvements to road and rail for goods and people</i>
<ul style="list-style-type: none">• Identifying and prioritising key infrastructure needs• Leveraging from existing assets• Increasing food production and value adding• Increasing visitor numbers• Developing the region’s workforce• Improving industry/research partnerships to foster innovation• Gaining policy support for the region’s key industries• Supporting place-based approaches to diversifying and transitioning the economy	<ul style="list-style-type: none">• Developing business cases for improvements to hospital facilities• Undertaking joint health workforce planning• Integrating health service delivery across the region• Supporting improved access to opportunities for Indigenous people• Improving key arts facilities	<ul style="list-style-type: none">• Researching the implications of the forecast growth and change in the population and employment• Attracting increased investment in public parks• Exploring economic development opportunities at waste and resource recovery operations	<ul style="list-style-type: none">• Improving the capacity of rail connectivity to Melbourne• Improving access to ports

BACKGROUND

What does this Strategy cover?

The Wellington Shire Council's Economic Development Strategy contains:

1. A vision for economic development drawing on past work, consultation with the business community and the analysis of data and trends.
2. A summary of the strategic objectives that will be the economic development priorities.
3. An outline of the current status of Wellington's economy.
4. A summary of the primary economic challenges and opportunities that have shaped the strategic objectives.
5. A two-year action plan to kick start economic development activity.
6. A set of performance measures to monitor progress of the Shire's economy.

About the Strategy

- The Strategy has been informed by consultation with our local business community and other key stakeholders.
- The Strategy builds on the Shire's major industries; liveability; and economic diversity.
- The Strategy is designed to be adaptable and dynamic, adjusted over time as conditions change.
- The Strategy will guide collaborative efforts between the Council and its partners in business; with training providers, tourism operators, industry peak bodies and other stakeholders.
- The Action Plan will be implemented over the next two years and in 2018, it will be reviewed and a new set of priorities will be outlined. In turn this will be revisited in 2020.

The background of the slide features a photograph of bare, dark tree branches against a light sky. A semi-transparent blue overlay covers the entire image. On the left side, a large, white-outlined number '2' is positioned vertically, spanning from the top to the middle of the frame.

2

THE VISION AND STRATEGIC OBJECTIVES

THE VISION AND STRATEGIC OBJECTIVES

The Vision

Wellington’s business community reaffirmed many of the priorities found in Wellington 2030 and the GRP, adding further detail and new ideas.

In Figure 1 we have combined the key words from Wellington 2030, the GRP, and the work behind this Strategy to highlight the terms and phrases that are uppermost in the minds of stakeholders. These are the challenges and opportunities that form the economic priorities for Wellington.

If we examine these key words, we find that they are linked by the concept of connectivity. That is connecting suppliers to markets, people to training, business operators to one another and the wider world to a greater awareness of Wellington. Connectivity needs channels, including roads, rail, high speed broadband (HSB), business networks and marketing.

Our Vision is displayed on page 2 and our Strategic Objectives are listed on page 6.



[Figure 1 - Key Issues and Opportunities]



3

ABOUT WELLINGTON

ABOUT WELLINGTON

A Stable and Robust Economy

There is an underlying stability to Wellington's economy. We can see this in some of the positive economic indicators. For example, unemployment has been relatively steady and low over the last decade and the number of residents with a university education has been steadily increasing.

Figure 2 shows measures of economic health in Wellington. The arrows indicate direction of change over the most recent periods for which we have reliable information. Taken together they reveal a relatively stable economy that is integrating more closely with its neighbours.

Wellington has Both Diversity and Specialisation

Wellington's economy is stable is because of 'specialised diversity'. Unlike many other parts of rural Victoria, the Shire does not rely on just one industry sector for its economic security. Its benefits from specialisation in agribusiness, defence, oil and gas, public administration and health, which, together employ around 60% of the workforce (Figure 3).

Some are focused on servicing markets outside of the Shire (e.g. agriculture, oil and gas, the RAAF Base and the prison – part of the public administration and safety sector). Others primarily service the local market (e.g. health, education and retail).

ABOUT WELLINGTON

Selected Economic Indicators

[Figure 2 - Selected Economic Indicators]

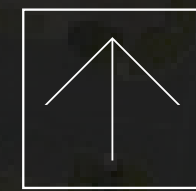
42,220



ESTIMATED RESIDENT POPULATION

Wellington's population has been modestly and steadily climbing for the last decade. Population growth is a strong indicator of economic health.

19,900



NUMBER OF RESIDENT WORKERS

The total resident workforce has been increasing. Amongst other things, this reflects the fact that there are now more people living in Wellington who work in Latrobe.

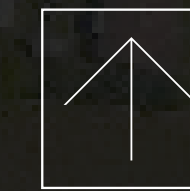
\$2.35b



GROSS REGIONAL PRODUCT (GRP)

Adjusted for inflation, in 2014, Wellington's GRP was \$2.35b. It has been trending down slightly over the last few years.

0.915



EMPLOYMENT DIVERSITY

The diversity of employment across industries in Wellington is high by rural standards and, between 2006 and 2011, it increased.

64.5%



WORKING AGE RESIDENTS

Between 2006 and 2011, the proportion of residents who are working age declined. However, relative to most other rural councils, it is still high and a sign of economic strength.

5.6%



UNEMPLOYMENT RATE

While unemployment has trended up over the last three years, it is still at the lower end of the range for the Gippsland Region and for rural Victoria.

14,277



NUMBER OF JOBS IN WELLINGTON

Between 2006 and 2011 the total number of jobs in Wellington declined slightly.

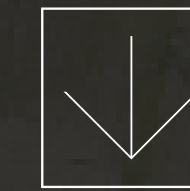
19.1%



UNIVERSITY EDUCATED

The proportion of working residents with a university qualification is at the lower end of the Gippsland range, but it has been increasing.

82%



EMPLOYMENT SELF-SUFFICIENCY

Between 2006 and 2011 employment self-sufficiency declined slightly. Wellington residents are now increasingly likely to work in other parts of Gippsland.

0.74



EMPLOYMENT SELF-CONTAINMENT

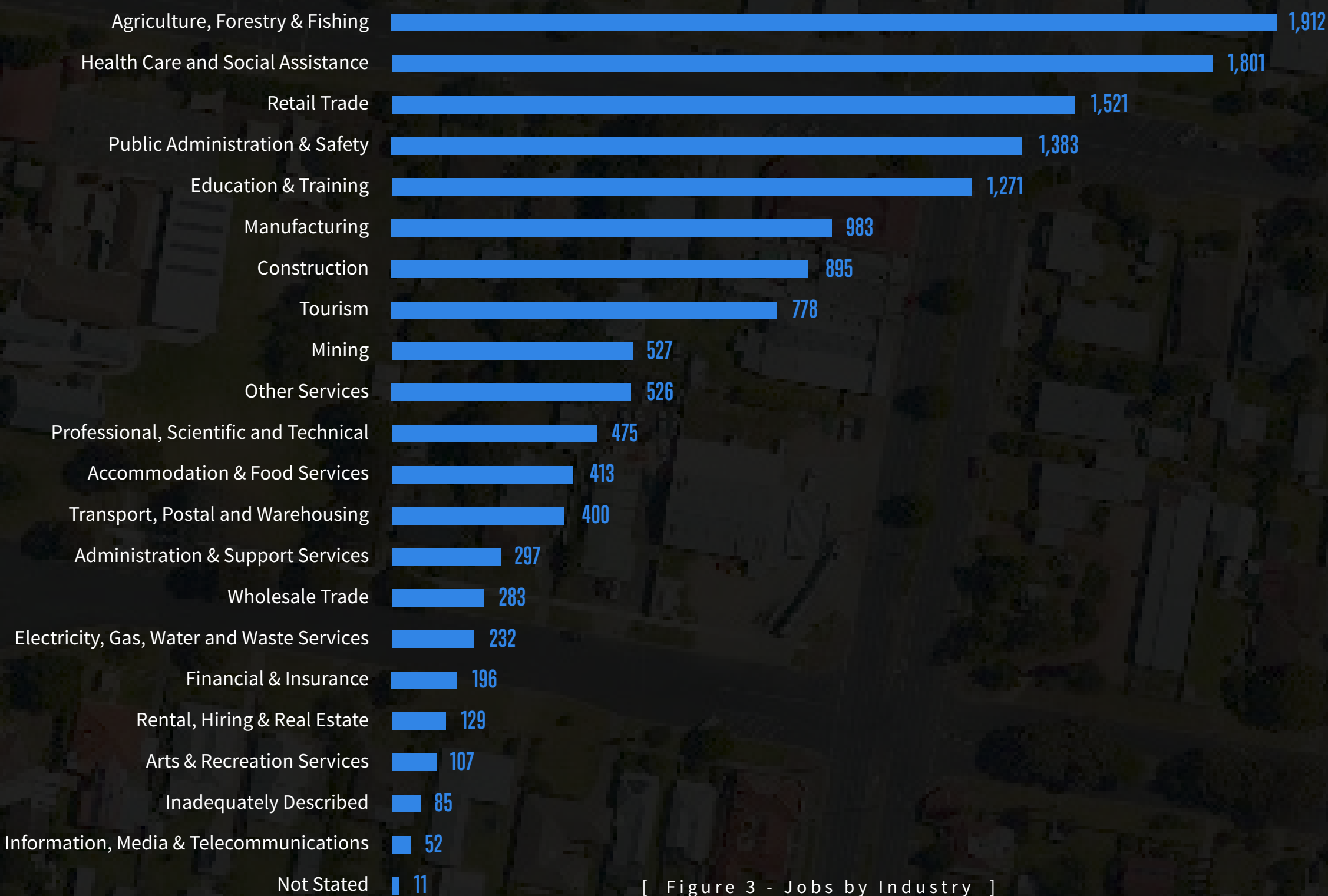
Employment self-containment also declined slightly. In some respects, this reflects the liveability of Wellington as people working in Latrobe choose to live in Wellington.

The proportion of working residents who work in Wellington.

The ratio of local jobs to local workers. That is, for every worker there are 0.74 jobs.

ABOUT WELLINGTON

Jobs by Industry



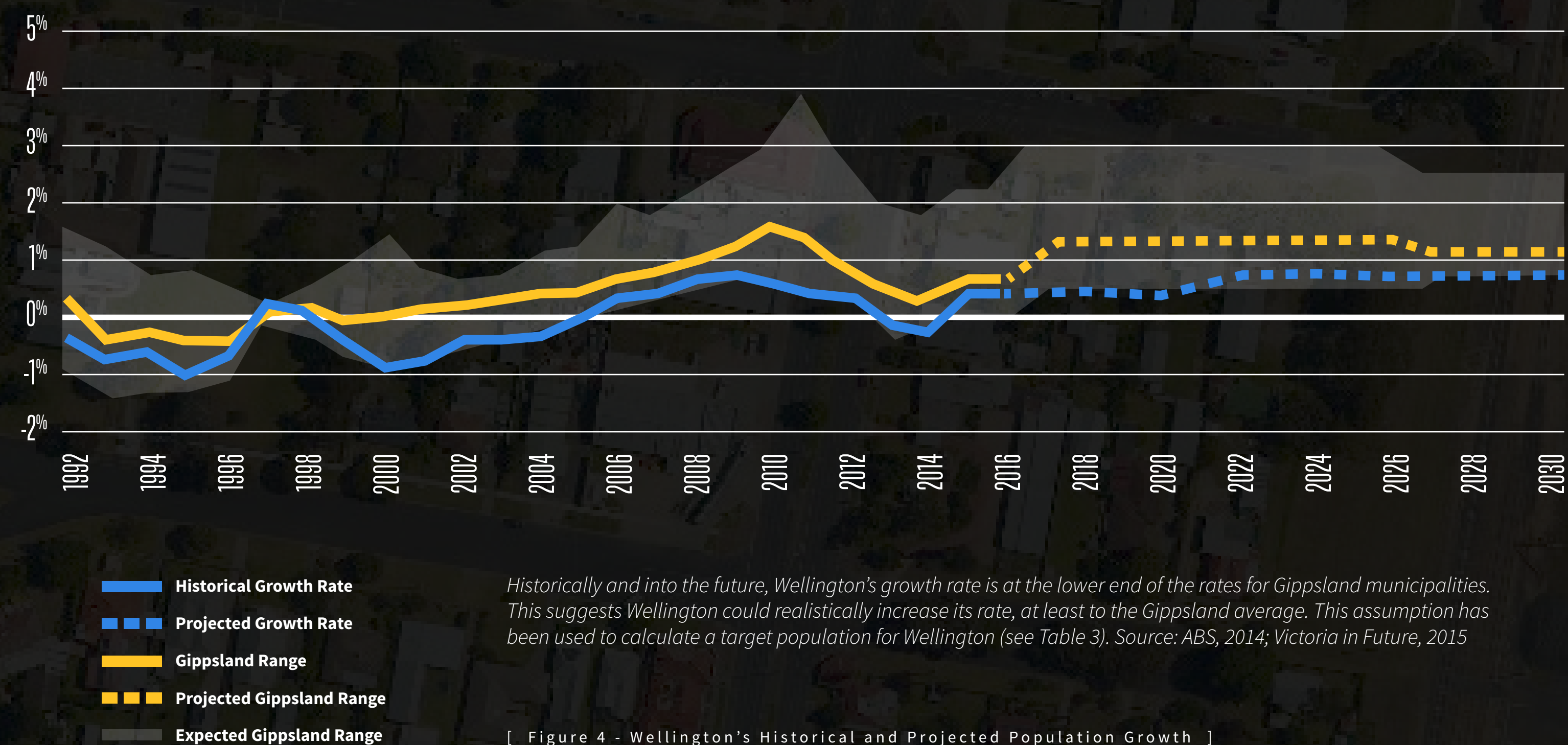
[Figure 3 - Jobs by Industry]

Notwithstanding the stability, there are still some challenges. For example:

- Some of Wellington’s major industries are quite mature and therefore not expected to contribute to job growth in a significant way.
- The level of commuting shows that there is relatively high economic integration within the region. This integration strengthens the local economy by creating bigger labour pools to draw from and consumer markets to sell into. However, it comes at the cost of lower employment self-containment and self-sufficiency (Figure 2).
- The number of university educated residents is steadily growing, but, from a low base, with the number of young graduates lower than for the rest of rural Victoria.
- The proportion of working age residents is higher than for the rest of rural Victoria, but, overall, population growth is low. In fact, according to the State Government forecasts, it is at the lower end of the expected range for Gippsland (Figure 4).
- *At the last Census, 74% of Wellington’s working residents were employed in Wellington Shire. The Gippsland regional average was 73%. Approximately 1,000 residents travelled to Latrobe for work (~7% of the Wellington workforce).*

ABOUT WELLINGTON

Wellington's Historical and Projected Population Growth



Actions taken by Council and other stakeholders can influence growth in major industries as well as the liveability of the municipality and, in doing so, generate a higher population growth rate. For example, Wellington's growth is expected to spike in 2018/19 as activity at the RAAF Base East Sale ramps up. Council has influenced and advocated for this expansion over a number of years.

A Liveable Municipality

As the indicators suggest, another key feature of Wellington's economy is the growing number of people who are choosing to live in Wellington and commute to other parts of Gippsland for work (primarily Latrobe). This has been increasing and is because of the increasing levels of liveability and amenity that Wellington has to offer. This is a critically important strength for Wellington as demand for urban amenity (e.g. health services, public transport and arts) in rural Victoria continues to grow.

The background is a collage of four images of bridges, all tinted in a deep blue color. The images show different perspectives of bridge structures, including trusses and railings. A large, white, outlined number '4' is positioned on the left side, partially overlapping the bridge images.

4

THE CHALLENGES AND OPPORTUNITIES

THE CHALLENGES AND OPPORTUNITIES

Investigating the key challenges and opportunities helps us to formulate our vision for Wellington's economy. In turn, this pinpoints the strategic objectives and the specific actions that will help us achieve our vision (Figure C).

These challenges and opportunities cover seven distinctive themes:

- 1. Connecting** - Improving the links between places, products and people.
- 2. Diversifying** - Value adding to the major anchor industries.
- 3. Digital Economy** - Driving growth with the Digital Economy.
- 4. Living** - Leveraging from Wellington's enviable liveability.
- 5. Skilling** - Improving the workforce skills profile.
- 6. Investing** – Facilitating investment in enabling infrastructure.
- 7. Promoting** - Revealing Wellington's secrets to a wider audience of investors and visitors.

1. Connecting - Improving the Links Between Places, Products and People

Connectivity is a key challenge for all economies. This means everything from better transport links moving products to market (including the mooted Port of Hastings), to connecting businesses with High Speed Broadband (HSB).

Our consultation found that better passenger rail services is a priority for local stakeholders and we know that improving passenger rail can have a big impact on regional population growth. In fact, analysis of data from around rural Victoria shows that the introduction of improved passenger rail is a major trigger for population growth.

The link between rail services and growth is even stronger when we just look at short-haul services (Long-haul refers to low scheduling (e.g. one to three services/day). Short-haul is regular services designed to facilitate work, education or other regular commuting. So, for example, the Melbourne-Traralgon line is short-haul, but Melbourne-Sale/

Bairnsdale is long-haul.). Between 2005 and 2012, passenger numbers on short-haul services in Victoria increased two and a half times more than on long-haul services. Furthermore, the benefits experience a positive feedback effect: short-haul services attract more residents to towns along the lines, which, in turn, increases passenger numbers.

More passenger rail services between Sale and Traralgon (and, therefore, Melbourne) will make it easier for people to commute for work, business, recreation and service access.

More information is needed about who is travelling, where and why. Nonetheless, it is clear that better passenger rail is an important complement to the road connectivity improvements already underway.

THE CHALLENGES AND OPPORTUNITIES

2. Diversifying - Value Adding to the Major Industries

Wellington’s major industries are well-established. In some cases, they are quite mature, low growth sectors. But this underplays their significance as the flow-on benefits into the rest of the economy are considerable.

Figure 7 compares the local strength and estimated growth potential of the major industry sectors and subsectors in Wellington. The major employers are in bold. They are the foundation of the Shire’s economy and, therefore, critical to its resilience and future development. Building on local major industries like this represents an expansion of the economy into new activities and has been described as ‘specialised diversity’.



[Figure 5 - Key Sectors, Growth Potential and Local Strength]

THE CHALLENGES AND OPPORTUNITIES

New Opportunities in Agribusiness

Agriculture has the largest physical presence in the Shire and generates a total output close to \$5 billion. In dairy alone, it is currently worth around \$820 million in farm, manufacturing and export value; approximately 6% of the national total. Over 10% (2,113) of Wellington's workforce is employed in this sector; second only to health care and social assistance (2,230). The Shire also has 52% of Gippsland's private timber plantations and three timber mills.

Wellington's large agribusiness sector creates service demand across the economy: everything from machinery to training. Growth in agribusiness may not always result in a high number of new jobs in the industry, but it creates many more elsewhere in the economy, making it one of the most important sectors in Wellington.

Key points to note are:

- World agribusiness commodity demand is growing, which is why food and fibre are at the centre of the State Government's economic policy focus.
- In Wellington, market prospects are particularly good in high quality dairy, horticulture and food processing. Underpinning this is Southern Rural Water's Macalister Irrigation District. This is the largest irrigation system in Southern Victoria with 1,000 customers and over 650km of channels. Council continues to advocate for further modernisation as part of Southern Rural Water's MID2030 project, which will stimulate major expansion of dairy and vegetable growing.
- After a period of intense international competition (e.g. from the entry of Vietnam and Thailand), the demand for timber products is expected to rebound in both international and domestic markets.
- Wellington continues to experience growth in agri-tourism sectors such as local produce and wineries, including farm gate opportunities, and these offer further potential.

Working with local industry, Council has already embarked on efforts to identify and support the expansion and diversification of agribusiness activity. This includes looking into productivity improvements through infrastructure investment and innovation; new niche markets, including agribusiness training; and new sectors (e.g. horticulture). In timber, the emphasis is on greater efficiency in milling, the potential use of biomass to become more energy efficient, and expanding both domestic and international markets.

All of these opportunities rely on better connectivity to suppliers and markets. Given the size of agribusiness and its importance across the region, the recently established Invest Gippsland group, led by Regional Development Australia, is the ideal forum through which to continue support for the sector.

THE CHALLENGES AND OPPORTUNITIES



Leveraging from Pilot Training at RAAF East Sale

The RAAF Base East Sale is about to undergo a major expansion of pilot training programs. It is expected to reach its (currently planned) full operational status by 2019; bringing at least 30 new Defence Force personnel and around 90 additional civilian staff to the region.

This activity will generate flow-on benefits to local service providers in construction, administration and other services such as IT. Additionally, the co-location of all initial aviation training may become an attractor to other aviation training and business opportunities.

To capitalise on this advantage, we can:

1. Find opportunities for complementary business activity, starting with research into the type of economic activity that can leverage from a major Defence presence.
2. Ensure Wellington continues to be seen as a desirable place to live and work for all new staff and their families. At a minimum, this will help maintain low staff turnover rates. Maintaining and enhancing the local quality of life, particularly in and around Sale, will need to form part of this effort, as will helping the partners of new staff find local employment opportunities.
3. Council has already started these efforts. For example, growth and development opportunities at West Sale Airport has been the subject of detailed analysis.

The main enterprises and entities involved with the RAAF have already shown their willingness to assist and these will be important partnerships to help leverage from the planned expansion.

THE CHALLENGES AND OPPORTUNITIES

Oil and Gas – A Mature Industry

Oil and gas extraction and processing directly employs around 350 people in Wellington at Exxon Mobil, which produces about 70% of Victoria's gas supply from the Longford plant. At least for the new few decades the sector will provide a large and stable number of secure, well-paid jobs.

As the recent land use activity audit found, while the industry is mature and unlikely to expand much further, it has supported the creation of a significant number of supply chain enterprises in the Shire, particularly engineering, manufacturing and logistics firms; at a scale rarely found in rural Australia. This cluster is concentrated in Wurruk.

The key to supporting this industry is continuing to ensure that local quality of life attracts and retains workers to the region and reduces labour turnover rates.

Diverse and Secure Government Services Employment

One sector that often goes unacknowledged when taking stock of local economic strengths is public administration. At the last Census there were over 900 people working in this sector (not including Defence). This includes local, State and Commonwealth government agencies, as well as Fulham Correctional Centre. This sector has several distinct advantages including stable employment.

Fulham is a major employer in Wellington (some 304 full time equivalent jobs). From time to time this complement can rapidly increase or decrease, although the long-term expectation is for steady, incremental growth. The challenge for this industry is turnover. While well-paid and with substantial career prospects, Fulham is competing for skilled labour in a market that extends to metropolitan Melbourne. The priority, then, is to find ways to help attract local people into the sector by working with Fulham, local training providers, schools and other stakeholders.

THE CHALLENGES AND OPPORTUNITIES

Supporting the Other Major Industries

There are other industry opportunities, particularly in health, manufacturing and professional services, sectors that have very positive growth prospects and in which Wellington already has some advantages. For example:

1. Like most of regional Victoria, the ageing population is now being seen as an economic opportunity, rather than a service demand problem. Given the quality of life for which Wellington is justifiably proud, the growth in the number of older residents is likely to accelerate, which will increase demand for aged care and health and recreation services.
2. The Soil and Organic Recycling Facility in Dutson Downs is an excellent example of a new industry with substantial growth potential. The facility is run by Gippsland Water and is expected to handle a growing share of Victoria's organic waste. Growth in this industry has been recognised in the GRP as another major industry opportunity for Gippsland and fits well with the idea of Wellington as a clean and green region.

3. The impact of climate change has the potential to negatively impact some sectors of the economy, while providing opportunities in others. Council has a leadership role in the transition. A collaborative approach between local, State and Federal government agencies to prepare climate change mitigation and adaption plans has been recognised in the GRP, as is the need to position Gippsland as a future leader in new, low emissions energy technologies including renewables.

In view of the diverse profile and prospects for these major industries, the Strategy needs to take a tailor-made approach to each. Where industries are dominated by one employer, this can be as simple as having regular, open and direct communication. With other industries, there may be a range of individuals and enterprises with a mix of views. This lends itself to industry forums, committees and other ways to ensure ideas and concerns are rapidly shared and addressed.

THE CHALLENGES AND OPPORTUNITIES

3. Digital Economy - Driving Growth with the Digital Economy

High Speed Broadband (HSB) is called the ‘fourth utility’; as essential, now, to day-to-day economic activity as electricity, gas and water. Its importance reflects that more and more of our economic activity, and economic growth, is part of what we call the digital economy.

In 2013, Wellington Shire Council and other Gippsland councils began work on a Digital Engagement Strategy. Workshops were run with business and community. These included practical subjects such as social media and the use of cloud computing and VOIP (Voice Over Internet Protocol) to reduce communication costs.

In addition to this, Council recently delivered social media and other business workshops promoting the use of online tools, and a Business Newsletter and visits by the Economic Development team advising businesses on the benefits of the imminent NBN.

Council also established a NBN Liaison team to work with NBN Co to encourage and facilitate its roll out (particularly fixed wireless) in the areas surrounding the major towns. The emphasis from the Council team has been on ubiquity, reliability and speed.

NBN Co has now commenced planning for ‘Mixed Mode’ or ‘Fibre to the Node’ in Sale, Stratford, Maffra and Heyfield and is working with Council to obtain advice on the placement of those nodes. Planning for Yarram, Rosedale and Loch Sport will commence in 2017.

THE CHALLENGES AND OPPORTUNITIES



The NBN, First Movers Advantage and SMEs

There is a significant ‘first-movers’ advantage to new technology. This means that, those enterprises and regions that ensure HSB is widely available and broadly adopted are more likely to be benefit and those benefits are likely to be greater, as the market advantage could translate into ongoing dominance. In simple terms, not only is access to HSB essential, but early access is critical to being competitive and, therefore to encouraging more local investment.

This is especially relevant to Wellington. Small and medium enterprises (SMEs) make up most of Wellington’s economy. They employ more people, grow at a faster rate and are able, and prepared, to innovate and experiment more than larger firms. That means that, assuming they are able to, they are most likely to embrace HSB; benefit more from rapid take up of HSB; and therefore, benefit more from programs designed to support this.

Council can continue to drive this transition by:

- Continuing to advocate for faster and more comprehensive NBN rollout, through direct discussions with NBN Co and by demonstrating the economic, social and other benefits of it to the municipality and to potential investors.
- Leading by example, through use of VOIP for video conferencing, demonstrating significant cost saving through clever use of technology and improving Council web based services in line with available technology; and
- Partnering with Business and Tourism Associations and other entities (e.g. TAFEs) to roll out demonstration schemes, or supporting programs, collaborative websites to share information, and to sponsor digital literacy programs that support overall use of technology to improve business and visitor economy outcomes.

THE CHALLENGES AND OPPORTUNITIES

4. Living – Leveraging from Wellington’s Envable Liveability

While Wellington depends heavily on its very ‘pragmatic industries’ (dairy, agribusiness, defence, oil and gas), there is potential to expand and diversify its tourism sector as well. In turn this improves liveability in Wellington, which will help attract and retain new residents.

Who is Visiting Us?

Over 800,000 visitors to Wellington spend \$103 million per year on accommodation, food and drink, transport, shopping, tours and other activities. A typical visitor to Wellington will:

- Be a day visitor (over 60% of visitors are domestic day visitors);
- Be frugal (average spend is low compared to elsewhere in the region) not least because they are staying with family and friends but because there are few commercial attractions on which to spend money.
- Spend more if staying in paid accommodation (over 60% of all expenditure is from domestic overnight visitors); and
- Be visiting friends and family or coming for business (almost half are visiting for these reasons, compared with only one third in East Gippsland for example).

This suggests room to grow. For example, while international tourists may not be a major part of Wellington’s current visitor market strength, evidence from elsewhere clearly indicate growing interest in nature based activities and this is one of Wellington’s strengths. In fact, Wellington can offer a diversity of natural landscapes to enjoy, from coasts, to wetlands and mountain forests. Moreover, improving recreational amenity, accommodation, food and activities helps to improve local lifestyle and residential amenity, which is critical to population growth.

THE CHALLENGES AND OPPORTUNITIES

Amenity and Population Growth

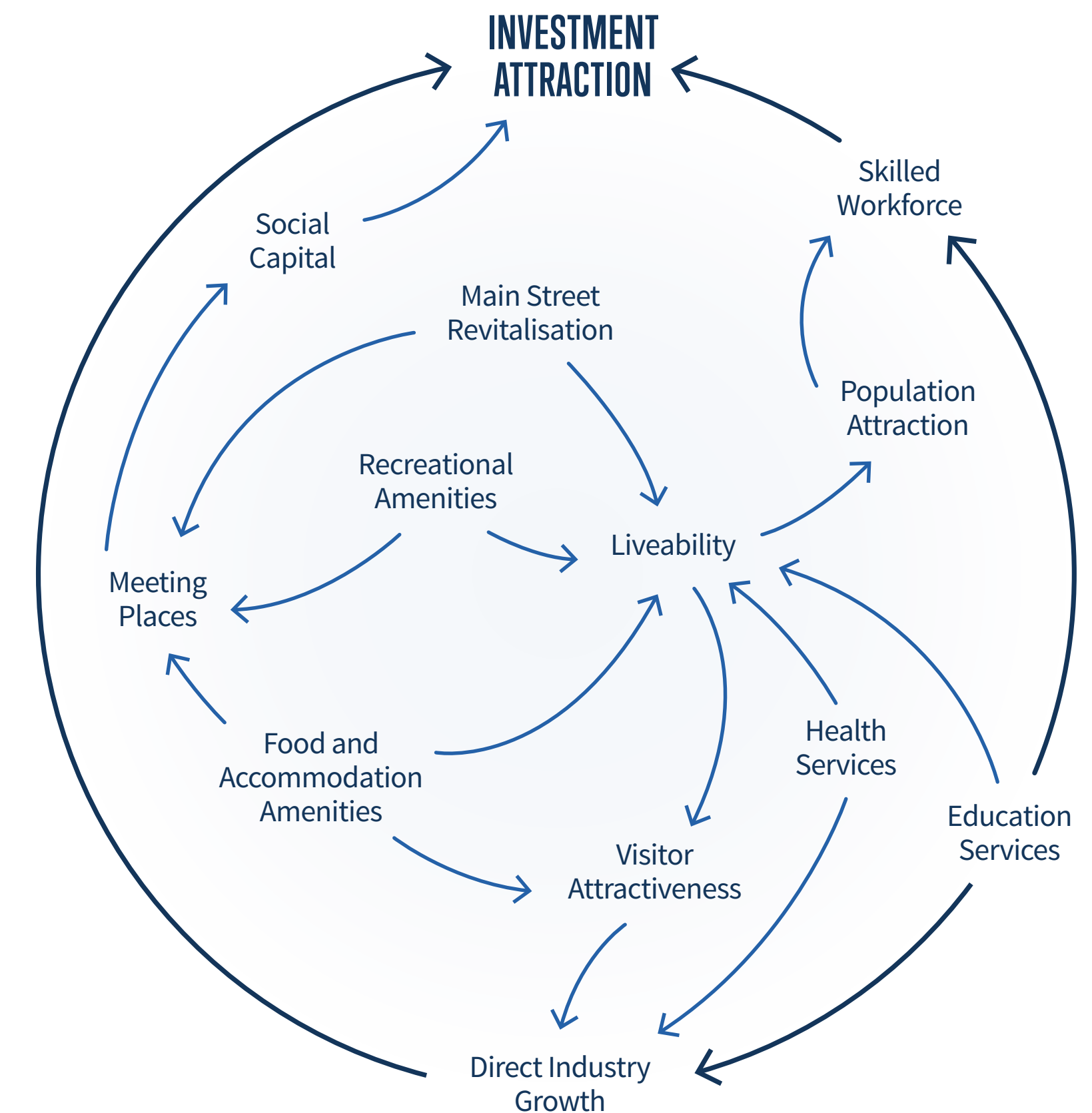
Stakeholders are almost unanimous that once people move to Wellington, they want to stay. This is because of the quality of life. The connection between this and population growth is very clear. Improving accommodation, hospitality, recreation facilities and supporting services helps attract visitors (particularly repeat visitors) but also benefits residents across the different market segments, from young working families to semi-retirees and the elderly. Figure 8 is a simple illustration of the links between liveability and investment.

Population growth can be stimulated by strategic investment in residential amenity (as well as in economic infrastructure). Key towns to consider for residential amenity improvements are:

- Rosedale (because of proximity to the growing employment hub of Traralgon);
- Stratford (already being considered as an attractive, lifestyle oriented small town residential alternative to Sale);
- Yarram, Heyfield and Maffra (each at the centre of evolving industries); and
- Sale itself (the main town that will benefit greatly from, amongst other things, the Defence investment).

Investment in main street renewal, urban infrastructure like public Wi-Fi, health care, in-town educational and recreational facilities (e.g. around Port of Sale) all helps to attract visitors and new residents.

We also know that high amenity in our town centres (e.g. a diverse, affordable mix of housing, good recreational and hospitality services and HSB) is critical to attract the SME sector which, as we know, account for most of the jobs, jobs growth and innovation in Australia.



[Figure 6 - The Connection between Amenity and Economy]

THE CHALLENGES AND OPPORTUNITIES



Leveraging from the Natural Attractions

Natural attractions in Wellington are important offerings for visitors, particularly given Wellington is the gateway to the western end of the Gippsland Lakes. Prominent features include Lakes Wellington and Victoria, the surrounding RAMSAR wetlands, Gippsland Lakes Coastal Park, Lakes National Park, Tarra Bulga and the Alpine National Parks and Ninety Mile Beach. They showcase a diversity of landscapes, but they do not yet match the iconic ‘must-see’ status of other parts of Victoria such as the Great Ocean Road. Nor have they been emphasised in State tourism promotion. There are also few high end accommodation options in the Shire to service them.

Given the proximity of campsites and small towns, there is potential for investment in higher end accommodation adjacent to these attractions (e.g. upmarket cabins in the Parks); and for building on the value of rail trails, by, for example, extending the

Great Southern Rail Trail from Welshpool to Alberton to connect with the Tarra Trail, creating a continuous trail between Yarram and Leongatha.

In addition to natural landscapes, there are the tourist roads such as Grand Ridge Road and the Dargo and Licola Roads (albeit with notable unsealed sections). The Princes Highway is also a key Sydney-Melbourne route and, being two and a half hours from Melbourne, Sale is an ideal lunch stop and makes the Port of Sale redevelopment a great opportunity. In combination, there is substantial opportunity to create tourism routes linking attractions in and out of the Shire.

THE CHALLENGES AND OPPORTUNITIES

Finding and Developing Niche Markets

The tourism focus in Wellington leverages from a number of niche markets – fishing, boating, hunting, 4WDing. A greater focus is also required on nature based tourism around the Gippsland Lakes and wetlands, Strzelecki Ranges and Alpine National Parks. Developing these markets can be incremental, starting with local patronage, to build a product and brand.

People with disabilities and their carers are a further niche market to be considered. Destination Gippsland estimates it could be as much as 20% of the total visitor market to Gippsland. The accessible boardwalks and walking tracks of Lake Guthridge and Sale Common could be replicated elsewhere and, with investment in specialised accommodation, could be explicitly marketed.

The Campervan Motorhome Club of Australia (CMCA) has recently endorsed four towns of Yarram, Sale, Heyfield and Rosedale with RV friendly status due to their ability to meet certain essential criteria outlined by the CMCA. These essential criteria include resources such as free overnight parking and accessible free dump points.

The RV market is growing and Council should maximise the benefits of this through a co-operative and strategic approach with local businesses and the community. This means investment in local infrastructure such as additional signage, long vehicle parking and overnight stays in both free/low cost sites and caravan parks. By adopting a Shire-wide approach, support can also be given to

local commercial caravan parks and tourist operators to adequately satisfy the needs of the growing RV, caravan and camping market.

Subject to resource constraints, there is considerable support from the tourism industry to further develop events activity, focusing on those in which Wellington can be competitive. Expanding local capacity to secure State or National events in areas such as equestrian, cycling, swimming and hockey will attract visitors and growth potential for other non-sport related niche events should continue to be investigated.

THE CHALLENGES AND OPPORTUNITIES

Servicing the Local Community

The local community generates a significant share of visitation to Wellington: through business travel to local enterprises; trips by visitors to local events; and visits from friends and relatives. The export drivers – farming, oil and gas, food manufacturing, the RAAF and regional services – are the mainstay of the accommodation sector, keeping hotels and motels full during the week. Growth events that attract visitors from outside Gippsland will also benefit the local accommodation sector, particularly those over a weekend.

A well-considered program of events to launch the Port of Sale redevelopment will help to raise awareness and could form part of an ongoing events calendar that has a State-wide as well as local and regional draw. In contrast to the natural landscape, the emphasis here could be on arts and culture to fit with the Port of Sale cultural hub but it could also encourage local food and produce, which is a growing events market in itself.

Partnering with Stakeholders

There are a range of stakeholders who work with Council to develop the tourism market in Wellington: including Wellington Regional Tourism (WRT), Destination Gippsland, Parks Victoria, local businesses and the Visitor Information Centres at Sale, Maffra and Yarram. The change to the VIC network (new management and premises in Sale) presents an opportunity to reconsider how some of these governance structures and responsibilities are arranged. For example:

- It is essential that there is a diverse and involved tourism business community working with the Shire on product development, branding and marketing; and
- The three principle roles of tourism development (marketing and promotion; industry stakeholder development; and investment attraction) can be more clearly allocated to ensure resources and expertise are deployed efficiently.

THE CHALLENGES AND OPPORTUNITIES

5. Skilling - Improving the Workforce Skills Profile

As the digital, mostly service-based, economy has grown in importance, so too has the importance of human capital. This is a measure of the total stock of knowledge, creativity and attitudes of people applied to generating economic value. Its value depends on both the total number of people, and also their level of skill.

The key for Wellington is to continue working on raising the skill base of the resident workforce, both by attracting and retaining skilled workers, and by ensuring existing residents have the best possible access to education and training.

It is a complex issue and there are several factors to consider:

1. As our economies centralise, professional workers are proving increasingly difficult to attract to regional Australia. This needs to be addressed through higher salaries, better conditions and other incentives, much of which is beyond the capacity of the Shire to influence, or the SMEs that make up most of Wellington's economy, to fund. The good news is that while rural Victoria can sometimes find it difficult to attract staff, the quality of life in Wellington can make that task a little easier.
2. Notwithstanding the local quality of life, retaining skilled staff is always going to be a challenge. Because it is a smaller labour market, as people climb the career ladder they are often compelled to relocate to larger centres. Also, the spouses can struggle to find local work, putting pressure on the decision to leave.
3. The quality and reputation of primary and secondary schooling in Wellington is second to none. What has been consistently recognised is that under-investment in Wellington for many years has left the tertiary sector with little in the way of resources to deliver 21st Century quality education and training.
4. Training programs are prohibitively expensive for most of Wellington's SMEs. This has led to a shortage of workplace training options, and a smaller pool of highly skilled business people. Government can help to maximise jobs growth in the SME sector through the collaborative design of business incubators, networks, accelerators and training.
5. Most industry sectors are calling for increasingly diverse skills, particularly the faster growing service industries, such as health, education, professional services and advanced manufacturing.

THE CHALLENGES AND OPPORTUNITIES

Poor Training Access is Lowering the Participation Rate

In Wellington, the challenge of attracting and retaining skilled staff is compounded by two factors that make it difficult to source people from within the community:

1. The Shire's resident workforce has a lower than regional average proportion with Year 12 completion or higher education qualifications. Although these measures are improving, it suggests there is a need for easier access to training and education.
2. While it is true that more and more training and education is going online, there are still many types of training (particularly vocational) that need to be delivered either in the workplace or in tailor-made facilities. It is fair to say that Wellington's existing post-school education and training facilities are not of a sufficiently high standard to do this well. Nor are they conveniently located to ensure they are accessible for either transport disadvantaged students looking for their first qualification, or time poor workers looking to maintain their professional skills.

There is some evidence this lack of access is affecting post-compulsory participation rates. The number of Wellington students applying for and being offered university places is typical for rural Victoria. However, this is not translating into enough university or TAFE qualifications, with graduate proportions at the lower end of the regional range.

The Solution Will be a Mix of Strategies

Continuously improving Wellington's skilled workforce base will require a mix of solutions.

Work already completed by the Shire and its partners, including in State Government, has identified a catalytic investment that will transform the delivery of education and training in Wellington. This revolves around the consolidation of TAFE operations at a central location in Sale. The effort to secure commitment from all partners and funding will one of the ongoing actions of this Strategy.

In addition to this catalyst there are other actions that will help to improve access to tertiary level education and training:

- Continuing to experiment with incentives to attract professional workers into Wellington;
- Identifying ways to increase access to online and workplace training in the Shire; and
- Improving public transport links to larger urban centres where education and training facilities can offer more services.

THE CHALLENGES AND OPPORTUNITIES

6. Investing – Facilitating Investment in Infrastructure

As well as delivering quality of life, infrastructure is also critical to economic activity. Examples of State significant assets and projects already improving conditions in Wellington are:

- The Macalister Irrigation District (MID) 2030 project has already delivered a substantial upgrade to one of Australia's most important irrigation infrastructure assets. It continues to increase agricultural output and investment, particularly in dairy, but increasingly in intensive horticulture. There is still some way to go to expand the system to its fullest potential, and given the likely impact of climate change on water security, the MID, and the region is an important agricultural asset.
- The duplication of the Princes Highway is making the journey to Traralgon and Melbourne safer and faster, improving connectivity for business travellers, freight and visitors. Better passenger rail services will further improve this connectivity.
- The Port of Sale redevelopment will deliver an exceptional asset for the people of Wellington: for tourism, recreation, residential options and, potentially, education. It could become an iconic destination for people passing through, or visiting Wellington.
- The Sale Alternate road route is important for Gippsland, but comes with the challenge of minimising any negative consequences for Sale itself.

As many stakeholders have noted, there is still a lot to do. The GRP investigated and prioritised regional infrastructure needs for Gippsland's economy and these attest to the importance of connectivity and regional cooperation. The road duplication, further MID investment, addressing the passenger rail shortcomings, ensuring HSB is more widely available and developing West Sale Airport are all important, potentially catalytic investments.

Finally, replacing strategic transport infrastructure is an opportunity to prepare for growth. Ensuring these efforts to improve the enabling infrastructure are effective, warrants a close collaborative relationship between local, State and Commonwealth infrastructure planners, the business community and regional neighbours.

THE CHALLENGES AND OPPORTUNITIES



Commercial and Industrial Land Audits

Council has recently embarked on a valuable long-term project to map out industrial land use in Sale, Maffra and Yarram. The purpose of the activity audit (first carried out in 2015) is to monitor emerging and declining industries, and changes in the distribution and quantity of vacant land and buildings.

The audit, along with earlier analysis of industrial land has shown there is enough industrial land in the Shire to meet foreseeable demand. However, it is not all ideally located to be attractive to business; nor is it all necessarily made up of the right lot sizes, or well serviced, especially when it comes to HSB.

In response Council is about to commence the 'West Sale and Wurruk Industrial Land Supply Strategy'.

Its objective is to facilitate the release of land (currently identified in the 'Sale, Wurruk and Longford Structure Plan'), to provide for a more diverse range of lot sizes that are both strategically well located and adequately serviced. This will help the Shire to become a leader in the strategic provision of land for business, which is, after all, one of the primary responsibilities of local government.

As Council continues to monitor land use (through biennial audits) we will build up a picture of land use change, identify newly emerging industries, and improve the capacity to measure the gap between the supply of retail, commercial and industrial land and the expected demand for it.

THE CHALLENGES AND OPPORTUNITIES

7. Promoting – Revealing Wellington’s Secrets

It is clear that the people and businesses of Wellington have many things to be proud of. It is also clear that too few others know about Wellington and what it has to offer. This is a relatively simple issue and warrants a marketing plan that considers everything from what the name ‘Wellington’ denotes, to the make-up and location of the target market segments.

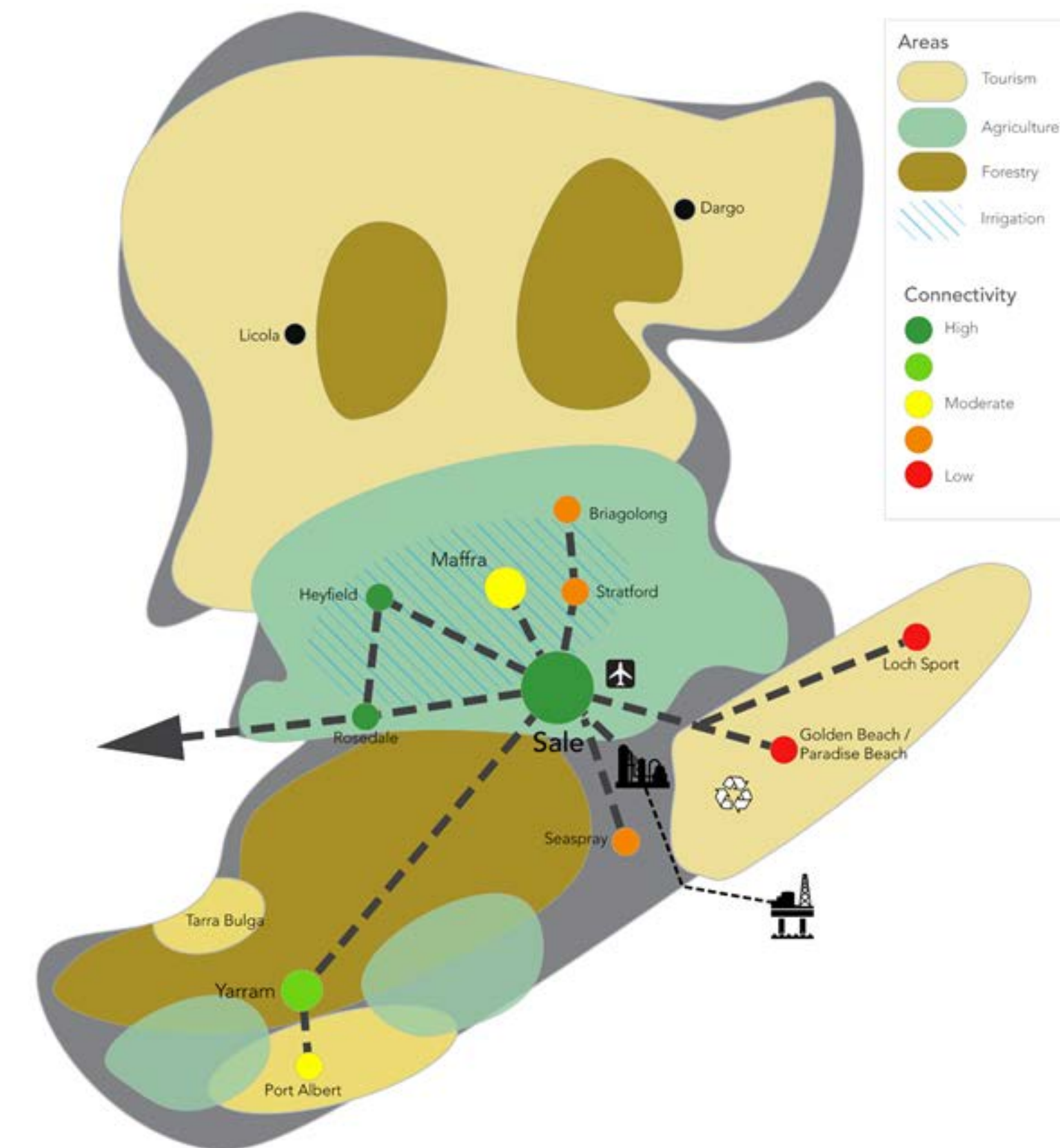
There are regions and locations throughout Wellington that are characterised or dominated by particular economic activities (Figure 9). These lend themselves to developing clear messages, branding and marketing strategies that promote visiting, living and/or investing in Wellington Shire.

Wellington has a lot to offer from affordable country and coastal lifestyles, urban town hubs, tourism and population attraction and investment opportunities, all within two to three hours of Melbourne.

However, this is not just about tourism or population attraction. It is also about ensuring investors know about the opportunities in:

- The Macalister Irrigation District and the dairy and horticulture sector;
- The RAAF Base East Sale, West Sale and associated aviation related activities;
- The Longford Plant and the manufacturing sector that has evolved from it in Wurruk;
- The timber plantations near Heyfield and Yarram; and
- The tourism assets spread across the Shire offering diverse investment potential.

As Figure 7 shows, almost all of Wellington accommodates one or more important economic assets. Figure 9 is a stylised representation of the key economic areas and assets in Wellington. Activities in each region are not exclusive, but generally dominate the area. The towns are colour coded according to their connectivity to employment hubs, health and education services, with Sale the economic hub for the region. (See www.geografia.com.au/victowns.index.html).



[Figure 7 - Wellington Economic Regions and Assets]



5

ACTIONS

ACTIONS

The seven themes outlined in Section Four capture the priority issues and concerns about Wellington’s economy. Along with the recommendations of Wellington 2030 and the GRP, they point to five strategic objectives that are the basis for the Strategy and a set of actions for the next two years.

The Action Plan (accompanying document) is the ‘working part’ of the Strategy. It is the set of tasks that the Economic Development Team will implement, in collaboration with other parts of Council and its stakeholders, over the next two years.

Beyond Year 2

In 2018, a progress report on the Strategy should be prepared to:

1. Consider what major macro-economic and demographic trends have emerged that are influencing the Shire’s economy. This demands regular and ongoing monitoring.
2. In light of this, reflect on whether the strategic objectives are still the priority issues.
3. Work with stakeholders to prepare a Year 3-4 Action Plan in light of the findings from points 1 and 2.

ACTIONS

Performance Indicators

Economies are complex. This makes it a challenge to draw a direct link between any specific action and a change in a part of the economy, such as the rate of job growth. What we can do, though, is to identify and then monitor two different types of indicator.

1. Indicators that reveal the overall health and direction of the economy. These include total jobs, population growth and the unemployment rate. They cannot necessarily be attributed to a particular action, but if they are heading in a good direction, then we can assume the Strategy is working well.
2. Indicators that may be more resource intensive to collect, but can provide a closer measure of success. This includes the number of new businesses starting up, the commercial and industrial land vacancy rate and the number of new attendees at business forums or other events.

To provide a way to measure the effect of the Strategy, we have identified indicators that fall into each of these categories (see Tables 3 and 4). They have been selected to ensure they:

- Provide a good overview of how the economy is tracking, ideally against other similar municipalities;
- Do not become too much of a resource drain to collect and analyse;
- Are relatively straightforward to interpret; and
- Can be tracked over time.

In Table 3, where possible, target values are identified (e.g. a rate of change or an absolute figure). These are taken from analysis of regional growth rates and the assumption that Wellington can match, or exceed the Gippsland average. In some instances, target values cannot be identified. In these cases, it is the direction of change that is important to monitor (e.g. total number of jobs stabilising or growing).

In Table 4, the second category of indicators can be directly linked to the strategic objectives. Benchmark numbers and rates of change for these indicators have been established, and should be reviewed in Phase 2 of the Strategy, in line with any new actions.

ACTIONS






Overall Economic Health Indicators

OVERALL ECONOMIC HEALTH INDICATOR	LATEST VALUE	RESPONSIBILITY LEVEL	SOURCE	2018 TARGET VALUE
Total Number of Jobs	14,192 (15.88% of Gippsland Workforce)	 Influence	REMPPLAN - Economic Profile August 2015	Maintain or Increase % relative to Gippsland workforce
Number of Businesses	3,889	 Influence	ABS Data by Region LGA June 2013	Maintain or increase number of businesses
Estimated Resident Population	41,965	 Influence	REMPPLAN Economic Profile 2015 (ABS Data - March each year)	Maintain or increase % relative to Gippsland population
Gross Regional Product	\$2.32b	 Monitor	REMPPLAN - Economic Profile August 2015	Maintain or increase % relative to Gippsland GRP
Unemployment Rate	Unemployment Rate	 Influence	REMPPLAN - Economic Profile August 2015	Maintain % lower than Gippsland unemployment rate

[Table 3 - Overall Economic Health Indicators]

ACTIONS

Specific Performance Measures

STRATEGIC OBJECTIVE	PERFORMANCE INDICATOR	RESPONSIBILITY LEVEL	SOURCE	2018 BENCHMARK TARGET VALUE/DIRECTION
Economic Diversity	Visitor numbers by type/duration	 Influence	Destination Gippsland	Maintain or Increase % relative to Gippsland
	Vacant industrial and commercial land use in Sale, Maffra and Yarram	 Influence	Biennial review of land audits	Decrease % vacant lot numbers
	Access to Internet at Home	 Monitor	Census	Increase from 68%
Amenity and Infrastructure	Value Building Approvals – Residential	 Influence	Economic Profile/ABS	Maintain or increase % change relative to Gippsland
	Value Building Approvals – Non-Residential	 Influence	Economic Profile/ABS	Maintain or increase % change relative to Gippsland

ACTIONS

Specific Performance Measures

STRATEGIC OBJECTIVE	PERFORMANCE INDICATOR	RESPONSIBILITY LEVEL	SOURCE	2018 BENCHMARK TARGET VALUE/DIRECTION
Leadership and Governance	Number of direct business engagement activities	<div>  Control </div>	Council internal database	TBD
	Number of sponsored or facilitated business workshops or events	<div>  Control </div>	Council internal database	Minimum of 15 annually
	Number of attendees at sponsored or facilitated business workshops or events	<div>  Influence </div>	Internal database	Minimum of 1000 annually

ACTIONS

Specific Performance Measures

STRATEGIC OBJECTIVE	PERFORMANCE INDICATOR	RESPONSIBILITY LEVEL	SOURCE	2018 BENCHMARK TARGET VALUE/DIRECTION
Skills and Education	Proportion of residents with post school qualifications (may be further specified)	 Influence	ABS Regional Data	Maintain or increase relative to Gippsland average
	Sale VIC Visitation Rates	 Influence	Internal Reporting	Increase from previous annual rates
Branding	Tourism Wellington website visitation numbers	 Influence	Website Analytics	Increase over previous annual rates

[Table 4 - Specific Performance Measures]



Sale Service Centre

18 Desailly Street (PO Box 506), Sale Victoria 3850
Tel 1300 366 244

Yarram Service Centre

156 Grant Street, Yarram Victoria 3971
Telephone 03 5182 5100

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