



■ **Table 6 - Education**

Level of education	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Postgraduate Degree	32	0.61%	168	2.47%	93	1.04%	65,335	1.78%
Graduate Diploma and Graduate Certificate	79	1.51%	214	3.15%	126	1.42%	64,725	1.76%
Bachelor Degree	389	7.44%	862	12.67%	596	6.69%	390,733	10.65%
Advanced Diploma and Diploma	325	6.22%	551	8.10%	500	5.62%	224,360	6.12%
Certificate	1,004	19.20%	1,318	19.37%	1,642	18.44%	532,731	14.52%
Not stated	714	13.66%	594	8.73%	1,080	12.13%	421,397	11.49%
Not applicable	2,685	51.36%	3,096	45.51%	4,866	54.66%	1,969,103	53.68%
<b>Total</b>	<b>5,228</b>	<b>100.00%</b>	<b>6,803</b>	<b>100.00%</b>	<b>8,903</b>	<b>100.00%</b>	<b>3,668,384</b>	<b>100.00%</b>

Source: ABS 2001 Census

### Employment

From Table 7, it can be seen that there is a higher dependence on agriculture, forestry and fishing in the three regions compared with Victoria. Across Murrindindi West, Nillumbik and Yarra Ranges North there is an average of approximately 8% of residents employed in agriculture, forestry and fishing as compared with 3.5% in Victoria. A large proportion of residents are employed in manufacturing and retail trade, though these proportions do not vary especially in comparison to Victoria.

■ **Table 7 - Regional Employment by sector (2001)**

Sector	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Agriculture, Forestry and Fishing	430	14.10%	157	3.34%	332	6.49%	72,639	3.49%
Mining	16	0.52%	0	0.00%	13	0.25%	4,472	0.21%
Manufacturing	422	13.84%	604	12.85%	785	15.35%	318,218	15.28%
Electricity, Gas and Water Supply	18	0.59%	22	0.47%	35	0.68%	12,916	0.62%
Construction	279	9.15%	566	12.05%	560	10.95%	136,454	6.55%
Wholesale Trade	161	5.28%	236	5.02%	265	5.18%	115,909	5.57%
Retail Trade	376	12.33%	576	12.26%	718	14.04%	307,419	14.76%
Accommodation, Cafes and Restaurants	115	3.77%	138	2.94%	284	5.55%	90,302	4.34%
Transport and Storage	115	3.77%	145	3.09%	199	3.89%	79,010	3.79%
Communication Services	26	0.85%	79	1.68%	62	1.21%	41,826	2.01%
Finance and Insurance	39	1.28%	129	2.75%	78	1.53%	81,986	3.94%
Property and Business Services	170	5.58%	500	10.64%	409	8.00%	237,123	11.39%
Government Administration and Defence	80	2.62%	120	2.55%	103	2.01%	62,253	2.99%
Education	248	8.13%	494	10.51%	353	6.90%	147,473	7.08%
Health and Community Services	296	9.71%	513	10.92%	451	8.82%	202,226	9.71%



	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
Cultural and Recreational Services	65	2.13%	137	2.92%	154	3.01%	53,251	2.56%
Personal and Other Services	104	3.41%	173	3.68%	166	3.25%	69,531	3.34%
Non-classifiable economic units	18	0.59%	26	0.55%	45	0.88%	11,681	0.56%
Not stated	71	2.33%	84	1.79%	71	1.39%	37,527	1.80%
<b>Total</b>	<b>3,049</b>	<b>100.00%</b>	<b>4,699</b>	<b>100.00%</b>	<b>5,113</b>	<b>100.00%</b>	<b>2,082,216</b>	<b>100.00%</b>

Source: 2001 ABS Census

Table 8 indicates the same data from the recently released 2006 Census. There have been some changes in classification which makes direct comparison across the tables more difficult at this stage. However the data show that employment in agriculture has fallen as has employment in manufacturing and retail and wholesale whereas employment in accommodation cafes and restaurants has risen as has employment in transport, education and health and community services except for the last category in Yarra Ranges North. Given the relatively small areas covered in these data this latter fall may reflect the relocation of a specific service. An interesting issue is the growth in tourism related employment.

■ **Table 8 - Regional Employment by sector (2006)**

	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
Industry of employment								
Agriculture, forestry & fishing	425	0.1218463	110	2.23%	316	5.52%	63,709	2.80%
Mining	7	0.20%	3	0.06%	18	0.31%	6,280	0.28%
Manufacturing	415	11.90%	560	11.37%	776	13.57%	287,106	12.62%
Electricity, gas, water & waste services	30	0.86%	38	0.77%	67	1.17%	20,017	0.88%
Construction	404	11.58%	618	12.55%	736	12.87%	171,463	7.54%
Wholesale trade	154	4.42%	209	4.24%	228	3.99%	112,555	4.95%
Retail trade	274	7.86%	446	9.06%	565	9.88%	263,444	11.58%
Accommodation & food services	180	5.16%	222	4.51%	426	7.45%	131,838	5.80%
Transport, postal & warehousing	136	3.90%	167	3.39%	251	4.39%	103,820	4.56%
Information media & telecommunications	49	1.40%	97	1.97%	77	1.35%	49,935	2.20%
Financial & insurance services	34	0.97%	143	2.90%	84	1.47%	92,291	4.06%
Rental, hiring & real estate services	33	0.95%	44	0.89%	81	1.42%	30,779	1.35%
Professional, scientific & technical services	127	3.64%	369	7.49%	267	4.67%	161,618	7.11%
Administrative & support services	78	2.24%	152	3.09%	137	2.40%	74,919	3.29%
Public administration & safety	209	5.99%	230	4.67%	214	3.74%	116,971	5.14%
Education & training	301	8.63%	560	11.37%	410	7.17%	174,420	7.67%
Health care & social assistance	352	10.09%	529	10.74%	521	9.11%	236,553	10.40%
Arts & recreation services	43	1.23%	102	2.07%	113	1.98%	35,653	1.57%
Other services	149	4.27%	187	3.80%	250	4.37%	81,643	3.59%
Inadequately described/Not stated	88	2.52%	139	2.82%	183	3.20%	59,433	2.61%
<b>Total</b>	<b>3,488</b>	<b>100.00%</b>	<b>4,925</b>	<b>100.00%</b>	<b>5,720</b>	<b>100.00%</b>	<b>2,274,447</b>	<b>100.00%</b>

Source: ABS Census 2006

The figures in Table 9 indicate the employment of residents from the region by occupation. Within Murrindindi and Nillumbik there are a higher proportion of managers and administrators compared to the State proportion but in Yarra Ranges there are fewer. This may be partly a reflection of the



rural nature of Murrindindi and Nillumbik where farmers are classified as managers and administrators. The three regions have higher proportions of tradespersons and related workers compared with Victoria and this is true also of labourers and related workers (except in Nillumbik, which has a lower proportion than Victoria).

■ **Table 9 - Regional Employment by occupation (2001)**

	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
Managers and Administrators	494	16.28%	507	10.76%	456	8.90%	198,149	9.52%
Professionals	449	14.80%	1,075	22.82%	722	14.09%	399,158	19.17%
Associate Professionals	305	10.05%	540	11.46%	540	10.54%	236,451	11.36%
Tradespersons and Related Workers	479	15.79%	712	15.11%	842	16.44%	253,927	12.20%
Advanced Clerical and Service Workers	96	3.16%	215	4.56%	189	3.69%	75,712	3.64%
Intermediate Clerical, Sales and Service Workers	360	11.87%	695	14.75%	730	14.25%	335,140	16.10%
Intermediate Production and Transport Workers	255	8.40%	256	5.43%	518	10.11%	168,320	8.08%
Elementary Clerical, Sales and Service Workers	182	6.00%	333	7.07%	425	8.30%	199,835	9.60%
Labourers and Related Workers	333	10.98%	278	5.90%	573	11.18%	171,732	8.25%
Inadequately described	42	1.38%	48	1.02%	54	1.05%	16,936	0.81%
Not stated	39	1.29%	52	1.10%	74	1.44%	26,856	1.29%
<b>Total</b>	<b>3034</b>	<b>100.00%</b>	<b>4,711</b>	<b>100.00%</b>	<b>5,123</b>	<b>100.00%</b>	<b>2,082,216</b>	<b>100.00%</b>

Source: 2001 ABS Census

Table 10 provides the occupancy data from the 2006 Census. Again the classifications differ so that direct comparison is not possible at this stage. However, the 2006 figures indicate a significant number of technicians and tradespersons, machinery operators and labourers across the project area. This could suggest some scope for employment of local contractors subject to the right mix of technical and trades skills.



■ **Table 10 - Regional Employment by occupation (2006)**

Regional Employment by occupation	Murrindindi (S) West		Nillumbik (S) Bal		Yarra Ranges (S) North		Victoria	
Managers	619	17.75%	735	14.92%	792	13.85%	306,323	13.47%
Professionals	556	15.94%	1148	23.31%	856	14.97%	472,307	20.77%
Technicians & trades workers	646	18.52%	869	17.64%	1,080	18.88%	319,191	14.03%
Community & personal service workers	346	9.92%	425	8.63%	536	9.37%	190,485	8.38%
Clerical and administrative workers	344	9.86%	714	14.50%	687	12.01%	337,418	14.84%
Sales workers	238	6.82%	388	7.88%	486	8.50%	230,375	10.13%
Machinery operators & drivers	243	6.97%	204	4.14%	449	7.85%	149,223	6.56%
Labourers	435	12.47%	360	7.31%	721	12.60%	224,542	9.87%
Inadequately described/not stated	61	1.75%	82	1.66%	113	1.98%	44,583	1.96%
total	3,488	100.00%	4,925	100.00%	5,720	100.00%	2,274,447	100.00%

Source: ABS Census 2006

**Unemployment**

Table 11 indicates the unemployment rates based on the latest Small Area Labour Markets data (March 2007).

■ **Table 11 - Labour market Data (March 2007)**

Location	Unemployment	Unemployment Rate %	Labour Force
Murrindindi East	115	3.5	3,272
Murrindindi West	137	3.4	4,030
Murrindindi Shire	252	3.45	7,302
Nillumbik South	251	1.4	18,420
Nillumbik South-west	249	1.7	14,256
Nillumbik Balance	127	2.1	5,972
Nillumbik Shire	627	1.6	38,648
Yarra Ranges Central	515	6.7	7,726
Yarra Ranges North	319	5.1	6,261
Yarra Ranges South-west	2347	3.5	67,134
Yarra Ranges Shire	4,015	4.9	81,121
Victoria Non Metropolitan	38,800	5.5	710,100
Victoria	131,000	4.9	2,673,700

Source: Department of Employment and Workplace Relations-Small Area Labour Markets March Quarter 2007

The figures in the table indicate that both Murrindindi and Nillumbik have lower than the Victorian average unemployment while Yarra Ranges as a whole has the same unemployment as the Victorian average although slightly higher than metropolitan Melbourne (4.7%). However, the south west part of Yarra Ranges that is on the metropolitan fringe and substantially metropolitan in character such as Lilydale, Chirnside Park etc. has lower unemployment than the average for Melbourne.



The relatively low unemployment in Murrindindi is not unusual and is similar to other regional areas where people without jobs tend to leave the area to seek work elsewhere, particularly younger people, and farmers may be classed as working while not earning a significant income.

The situation in Nillumbik is interesting and may reflect the relatively high educational qualifications of residents and the consequent over representation of professional and trades employment.

The issues of skills availability is discussed further overleaf.

## Income

### ■ Table 12 - Income

Category	Yarra Ranges		Murrindindi		Nillumbik		Victoria	
	Number	%	Number	%	Number	%	Number	%
Negative/Nil income	8,191	7.4	762	6.9	3,959	8.5	303,055	7.6
\$1 - \$149	8,837	8.0	846	7.7	4,099	8.8	296,839	7.5
\$150 - \$249	13,312	12.1	1,662	15.0	3,820	8.2	558,639	14.0
\$250 - \$399	14,478	13.1	1,590	14.4	4,841	10.4	506,249	12.7
\$400 - \$599	16,404	14.9	1,727	15.6	5,858	12.6	540,331	13.6
\$600 - \$799	13,026	11.8	1,178	10.7	4,911	10.6	423,791	10.6
\$800 - \$999	9,678	8.8	786	7.1	4,195	9.0	322,545	8.1
\$1,000 - \$1,299	9,121	8.3	734	6.6	4,675	10.1	302,247	7.6
\$1,300 - \$1,599	4,244	3.8	326	2.9	2,701	5.8	154,010	3.9
\$1,600 - \$1,999	2,212	2.0	125	1.1	1,722	3.7	91,535	2.3
\$2,000 or more	2,371	2.2	150	1.4	2,651	5.7	133,290	3.3
Individual income not stated	8,387	7.6	1,165	10.5	2,945	6.4	349,504	8.8
<b>Total</b>	<b>110,261</b>	<b>100</b>	<b>11,051</b>	<b>100</b>	<b>46,377</b>	<b>100</b>	<b>3,982,035</b>	<b>100</b>

Source ABS Census 2006

Table 12 indicates that Nillumbik is over represented at the higher and the very low incomes while Murrindindi tends to have lower incomes than the other LGAs.

## Internet Access

Table 13 indicates internet access across the three Shires and a comparison with Victoria as a whole.



■ **Table 13 - Internet Access**

Category	Yarra Ranges		Murrindindi		Nillumbik		Victoria	
	Number	%	Number	%	Number	%	Number	%
No Internet connection	14,736	30.7	2,018	40.32	3,569	19.2	635,423	35.7
Type of Internet connection:								
Broadband	20,658	43.1	1,313	26.2	10,458	56.2	716,851	40.2
Dial-up	11,163	23.3	1,486	29.7	4,204	22.6	360,374	20.2
Other	207	0.4	17	0.3	47	0.3	9,697	0.5
<i>Total</i>	<i>32,028</i>	<i>66.8</i>	<i>2,816</i>	<i>56.3</i>	<i>14,709</i>	<i>79.0</i>	<i>1,086,922</i>	<i>61.0</i>
Internet connection not stated	1,217	2.5	170	3.4	335	1.8	59,319	3.3
<b>Total</b>	<b>47,981</b>	<b>100</b>	<b>5,004</b>	<b>100</b>	<b>18,613</b>	<b>100</b>	<b>1,781,664</b>	<b>100</b>

Source ABS Census 2006

The figures in the table indicate that Nillumbik has a much higher internet connection than the other two LGAs and than the average for Victoria. The Yarra Ranges also has higher access than Victoria as a whole reflecting the difficulties with access in rural Victoria. Murrindindi as expected is currently under represented in internet access.

### 3.5 Regional Tourism Profile

The project area is within the Tourism Victoria Yarra Valley and Dandenong Ranges tourism Region (Figure 3). Broadly the Upper Yarra sub region covers the Murrindindi part of the project with the Yarra Ranges and Nillumbik section in the Melbourne East sub region. On this basis, this section discusses tourism to the Yarra Valley and Dandenong Ranges region (see Figure 5). Total visitation is also provided for the Shires of Murrindindi and Yarra Ranges separately.

■ Figure 3 - Tourism Victoria Campaign Regions



Campaign Region	Sub-Region	Sub-Region Code
A Daylesford and the Macedon Ranges	Macedon	1
	Spa Country	2
B Gippsland	Gippsland	3
	Lakes	4
C Goldfields	Ballarat	5
	Bendigo	6
D Grampians	Central Highlands	7
	Western Grampians	8
	Wimmera	9
E Great Ocean Road	Geelong	10
	Western	11
F Melbourne	Melbourne	12
G Mornington Peninsula	Peninsula	13
H Murray	Mallee	14
	Goulburn	15
	Central Murray	16
	Murray East	17
I Phillip Island	Phillip Island	18
J Victoria's High Country	High Country	19
K Yarra Valley and Dandenong Ranges	Melbourne East	20
	Upper Yarra	21

Source: Tourism Victoria

### 3.5.1 Yarra Valley and Dandenong Ranges Region

The latest regional expenditure data indicates that visitors to the Yarra Valley and Dandenong Ranges region (the Region) spent some \$356 million in the year to March 2005 at an average of some \$122 per trip.

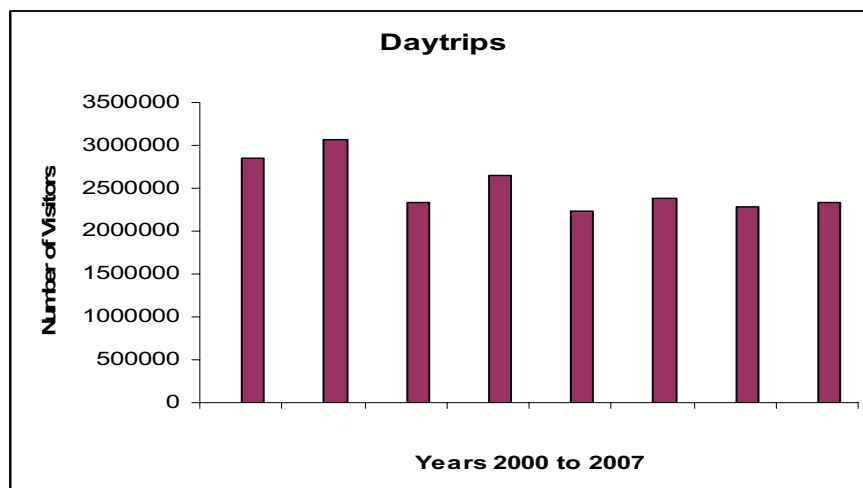
■ **Table 14 - Tourism Expenditure YE March 2005**

Visitor Type	Expenditure (\$ mill)	Expenditure per night (\$)	Expenditure per visit (\$)	No of visitor nights ('000)	No. of visitors ('000)
Day visitor	183		76		2,281
Domestic overnight	162	103	273	1,547	606
International Overnight	11		431		26
<b>Total</b>	<b>356</b>			<b>1,547</b>	<b>2,913</b>

Source: Tourism Victoria

Visitation over the recent past is shown in the following charts (Figure 4, Figure 5 & Figure 6) for day trippers, domestic overnight visitors and international visitors. Total visitation to the year end March 2007 to the Region was estimated at just over 2.9 million.

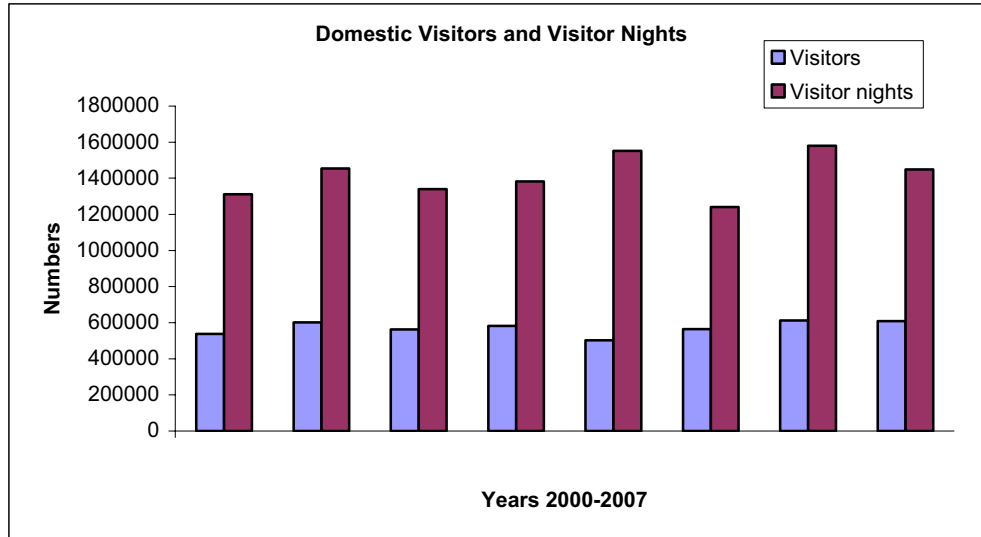
■ **Figure 4 - Domestic Day Trippers – Yarra Valley and Dandenong Ranges**



Source: Tourism Victoria

Figure 4 indicates the declining number of day trips to the Yarra Valley and Dandenong Ranges region. This trend could be based on such issues as higher fuel prices and cheaper interstate and international airfares. On this basis it could be argued that this downward trend could continue. However, the fall seems to have abated in recent years and as one of the nearest tourism destinations to Melbourne with a growing wine and food sector and an increasing number of supporting facilities, including attractions and accommodation, the Region is likely to see an increase in visitation including day trips.

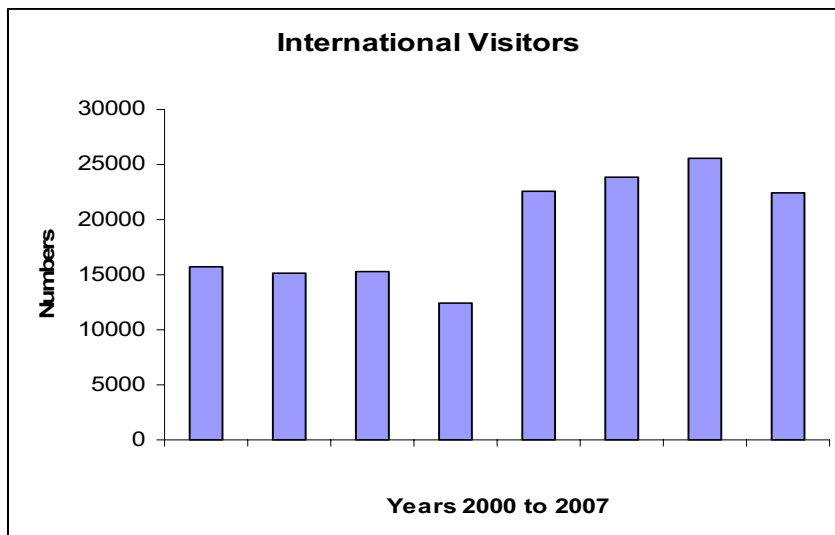
■ **Figure 5 - Domestic Visitor Nights – Yarra Valley and Dandenong Ranges**



Source: Tourism Victoria

There has been slight variation in both the number of visitor and visitor nights in the region, seen in Figure 5. However, it seems the numbers have remained broadly constant over the 8 years.

■ **Figure 6 - International Visitors – Yarra Valley and Dandenong Ranges**



Source: Tourism Victoria

From Figure 6, it can be seen that, despite a small decrease in 2007, there has been a general increase in international overnight visitors to the Region. Cheaper international airfares should support an upward trend in international visitors, although the rise in the Australian Dollar works against this. As seen from the expenditure data above, international visitors tend to spend more per trip and per night.



There is some evidence that the published international visitor data for the Region under estimates the actual number of international visitors. A survey of visitors to the Region’s wineries a few years ago suggested that over 100,000 international visitors visited the wineries. Anecdotal information provided at tourism operators’ workshops related to the feasibility of restoring the Lilydale-Healesville railway as a full tourist operation suggested that international visitation was at least the higher figure and growing. It is assumed that the additional international visitors are largely day trippers staying in Melbourne.

Table 15 indicates that while domestic visitation has declined over the recent past (some 4.27 million nights/days in 1999 to 3.74 million in 2007) expenditure has risen significantly. Over the period the consumer price index rose some 28% suggesting a further 14% real rise in expenditure potentially reflecting the increased quality of tourism facilities in the Region.

■ **Table 15 - Expenditure in the Yarra Valley and Dandenong Ranges Region**

	1999	2004	2005	2005/04 Change
Domestic Expenditure (\$ mill)	225	243	345	42%

Source: Tourism Victoria

The most prominent activities that international tourists wish to participate in are eating out, going shopping and visiting national parks, from Table 16. These activities also rate highly in other tourist areas in regional Victoria. From Table 16, it can be seen that domestic tourists have slightly different priorities. Although domestic tourists also want to eat out, they are interested in visiting friends and families, and general sight seeing and again these rates similarly in regional Victoria.

As expected both international and domestic visitors to the Yarra Valley are over represented as visitors to wineries compared with regional Victoria as a whole.

■ **Table 16 - Tourism Activities for International Tourists**

Activity	YVDR	Regional Victoria
Eat out/dine at restaurants and/or café	90%	93%
Go shopping for pleasure	80%	83%
Visit national parks/State parks	61%	66%
Go to markets	59%	58%
Go to the beach	58%	70%
Pubs, clubs, discos etc.	50%	60%
Visit museums or art galleries	45%	47%
Visit wineries	45%	31%
Visit botanical or other public gardens	43%	50%
Visit wildlife parks/zoos/aquariums	43%	48%
Bushwalking/rainforest walks	42%	49%
Visit history/heritage buildings, sites or monuments	36%	47%
Visit casinos	31%	23%