Hamilton and its Hinterland

The Changing Demographic and Labour Market Context of a Victorian Regional Centre

Simone Alexander, Trevor Budge, Robin Goodman and Dave Mercer
School of Social Science and Planning – RMIT University

JUNE 2005
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July 2005
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<table>
<thead>
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<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASCO</td>
<td>Australian Standard Classification of Occupations</td>
</tr>
<tr>
<td>CD</td>
<td>Collection District</td>
</tr>
<tr>
<td>DSE</td>
<td>Department of Sustainability and Environment</td>
</tr>
<tr>
<td>LGA</td>
<td>Local Government Area</td>
</tr>
<tr>
<td>RC</td>
<td>Rural Centre</td>
</tr>
<tr>
<td>SLA</td>
<td>Statistical Local Area</td>
</tr>
<tr>
<td>UCL</td>
<td>Urban Centres or Localities</td>
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1. Introduction

This report examines aspects of demographic and labour force change in Western Victoria to try to gain a better understanding of trends affecting the labour market and possible future areas of employment. The main focus is on rural, non-coastal areas and the report aims to present more up to date and detailed information for the Hamilton region than has previously been published (in for example *Regional Matters: An Atlas of Regional Victoria* 2001). The study has drawn on a number of sources, in particular a review of the available contemporary literature on issues relating to rural and regional development, data available from the Australian Bureau of Statistics, the Victorian Government and reports from a variety of public and private sector sources. It was commissioned by the Handbury Foundation and undertaken by Trevor Budge, Robin Goodman and Dave Mercer from the School of Social Science and Planning and Simone Alexander on secondment from the Australian Bureau of Statistics in 2004/05.

This report firstly considers the broad trends affecting rural and regional Victoria by looking at the global context and the economic and lifestyle changes which may impact on the study area. Secondly, the report provides a detailed analysis of available statistical data on population profile and labour market trends in the region. Finally, an attempt is made to summarise what both these broad trends and detailed statistics could mean for the future in terms of employment and prosperity in both the study area and in Western Victoria generally. We conclude with some considered views on possible ways forward.
2. Trends Affecting Rural and Regional Victoria

2.1 The Global Context

Each year since 1998, National Economics has produced a ‘State of the Regions’ report for the Australian Local Government Association. The most recent of these is the 2004-05 document (National Economics 2004). These reports have always emphasised that Australia has a number of quite distinct regional types, including core metropolitan regions, ‘life style’ regions, old economy production regions, and resource-based regions.

As a regional service centre for a predominantly agricultural hinterland, Hamilton and its surrounds are typical of many comparable wheat-sheep belt areas in regional Australia. National Economics classifies such areas as ‘rural and remote’. Depending upon individual circumstances, and local capacity and entrepreneurialism such areas can be faced either with a precarious economic and demographic future or one that prospers by capitalising on new and emerging opportunities (Cocklin and Dibden 2005).

The Australian economy is highly dependent upon the export of a relatively narrow range of agricultural and mineral commodities. Inevitably, this results in a high level of vulnerability to external forces. At the time of writing, for example, Australia’s current account deficit has blown out to its worst state for over 50 years. Despite record global demand and favourable terms of trade export growth has remained flat for the previous twelve months and the outlook does not look promising. Beef and sheep prices are projected to fall progressively over the next five years and demand for wool is also expected to ease as competition from synthetics increases (McKenzie 2005a).

The volatility associated with this situation is currently well exemplified by current problems in the Queensland sugar industry. For some time the industry was in decline in the face of stiff overseas competition, falling demand and declining prices. As a consequence the federal government implemented a radical restructuring programme to assist farmers to move out of the industry. But more recently there has been an equally sharp reversal of fortune for this sector. Prices are on the rise and there is a predicted shortfall of global production. As a consequence, producers have shown a marked reluctance to participate in the restructuring plan.

This example reinforces the point that one of the most momentous changes that has taken place in recent years has been the opening up of entire economies and individual commercial sectors to global competition (Sorensen 2000; Gray and Lawrence 2001). But while nations such as France and the United States have continued to heavily subsidise their agricultural sector and the associated regional towns and villages this has not been the case in Australia. Thus, different agricultural regions specialising in specific commodities have had no option in Australia but to compete aggressively on a world market that is far from being a level playing field and with minimal assistance from the state. Inevitably, this process has resulted in some regions ‘winning’ and others ‘losing’ (Stimson 2001).

Through farm amalgamations and the harnessing of innovative technologies, some regions have become highly productive, albeit with far fewer farms and agricultural workers. Australia-wide, over the last 40 years, the average commercial farm size has increased by...
50 per cent while the actual number of farms has fallen by the same percentage. Some commentators have calculated that an additional 30,000 farms will probably go out of business over the next 15 years (McKenzie 2005b). To take one area, following dairy industry deregulation in 2000, the estimate is that over 3500 dairy farmers have left this sector (Jackson 2005). Other areas have either been taken out of production altogether or have diversified into new ‘niche’ products such as olives, grapes, herbs and farm tourism. For western Victoria, mineral sands production, blue gum plantations and wind energy power stations are also now seen as offering valuable new opportunities.

Collits (2004:86) has recently emphasised that it is dangerous to generalise about rural and regional Australia for ‘regional conditions vary widely and much of non-metropolitan Australia is not in decline’. Further, simplistic measures such as population decline can mask significant increases in investment and productivity; and in many ‘post-productivist’, lifestyle regions, the ‘old’ measures of economic growth and health based around commodity production measures are no longer helpful. As many towns and regions are discovering, local events and festivals, for instance, can result in a large influx of people and expenditure in a town over a very short period. To take one example, the estimate by the Tamworth Regional Council is that the ten-day Tamworth Country Music Festival injects over $45 million into that centre each year (Best 2005).

Increased global competition has meant that for many Australian agricultural products there has been ongoing downward pressure on prices. This happened in 2003-04, for example, with wool being particularly badly affected. Wool is of fundamental significance to the western Victorian economy. Yet in that year, Australia-wide, the value of earnings from wool production fell by 28 per cent, fuelled by a 22 per cent drop in prices on the global market (Hopkins 2005).

There are many other big picture issues that impact differentially on specific agricultural regions, amongst them the campaign by animal liberationists and environmentalists against Australian wool, and the drought. Currently a global animal rights movement with 800,000 supporters, People for the Ethical Treatment of Animals (PETA), is targeting Australian wool producers for their allegedly cruel animal husbandry practices and pressing companies such as Benetton to stop purchasing Australian wool. They have already successfully persuaded the US clothing manufacturer, Abercrombie and Fitch, and the UK-based retailer, George, to stop buying Australian wool (Munro 2005). Thus a campaign being conducted on the other side of the world could impact directly on a specific part of Australia.

Over the last two years a major drought has affected parts of Queensland, New South Wales, South Australia and Victoria, and has seriously damaged milk production levels, in particular. The drought was accompanied by high costs for feed grain, fertiliser and oil, and a rising Australian dollar. Droughts are notoriously difficult to predict and largely out of the hands of individual farmers to control. They are also likely to become more common and longer-lasting if the predictions of the climate change scientists are to be believed (Botterill 2003).

In short, there are a host of external factors that can and do have an enormous (and often negative) impact on the fortunes of rural and regional Australia and which cause concern to farmers in all states. The recently produced South Australian Farmers’ Federation (SAFF) publication, A Triple Bottom Line for the Bush (2004) is a good example of the kinds of
discussion documents that are being produced around the country canvassing the ongoing problems and opportunities for rural areas. What differentiates such publications from their earlier counterparts in the 1970s and 1980s is the new emphasis on environmental considerations and the need to recognise the importance of natural capital and ecological sustainability. Much of what is touched upon in the SAFF policy paper has relevance to the Hamilton region.

2.2 Rural and Regional Economies – Tensions, Trends and Population Change

Population decline in rural Australia has been a feature of the demographic landscape for many decades. Initially associated with increasing mechanisation of agricultural practices in the early to mid-twentieth century, more recent factors include local government amalgamations, the withdrawal of government services, the closure of banks and decline of other industries such as manufacturing. In addition, changes in society, such as declining fertility and the increasing need for post-school education, have had impacts on the age composition of towns in rural Australia.

Concern about the long-term decline of many towns has reached the stage of widespread community frustration as services and functions integral to a town and its surrounding agricultural community are lost. There are fears that this could have long-lasting impacts on the local economy and the capacity to realise investment and development opportunities (Research Planning Design Group 2003:1). However, this is not an irreversible trend. Policy approaches to supporting rural Victoria are changing, and there are some important new social demographic movements that can be taken advantage of in order to reinvigorate these areas.

Agriculture has always been considered a key driver of rural economies, yet growth in this industry is not necessarily reflected in population increases. It is now recognised at a policy level that the creation of jobs in retail, business and financial services, tourism and hospitality is much more likely to lead to population growth. For example, one of the most effective ways to spur growth in a rural community is a modest investment in a coffee shop or delicatessen. An attractive café is a visible sign that the town is adding to its lifestyle attributes, and these businesses provide a social hub for the community.

Considerable research in North America is demonstrating the growing importance of these new trends. Williams and Jobes (1990:192-193) found that ‘urban-rural migration may indicate a new ethic in which occupation and income considerations are regarded as secondary or incidental to quality of life motivations among some persons’. And Salvesen and Renski (2002:v) found a similar pattern that ‘quality of life is becoming an increasingly important consideration in modern business location decisions’, a factor which will only increase as global forces push us towards ‘a more knowledge- and technology-intensive economy’.

Research in Australia is supporting such observations, particularly work that examines groups who are moving to rural and regional areas and the subsequent impact on employment structures (Murphy and Burnley 2003). Tangible factors driving this change include: increasing numbers of people moving into retirement years (the baby boom generation), improved technology breaking the nexus between home and workplace, the
shift in personal values which is seeing an increasing rejection of some elements of
metropolitan living and concern about aspects of large urban areas. A number of studies
emphasise that migration to rural areas is based on both the attracting factors in rural life
but also factors ‘pushing’ people out of metropolitan areas.

Regional centres are seen by new residents as offering pollution-free environments, reduced
traffic congestion, stronger community values, and opportunities to escape the high-density
housing in big cities. People in this group are accustomed to long periods of relatively high
wealth and are looking for ways to maintain their lifestyle into retirement (Regional
Development Victoria 2005). Whether these negative views about metropolitan living are
realities or not matters little – regional centres and rural areas are seen by a growing
proportion of the population as places that can meet personal and household needs.

2.3 Counterurbanisation

These broad-scale trends and changes had their origins in the 1970s when population
growth in rural and regional areas started to exceed growth in metropolitan areas. It was a
phenomenon that was observed in a number of western economies (Hugo and Smailes
1985; Champion 1989; Hugo 1994). Variously termed the ‘turnaround’, or
‘counterurbanisation’, this movement of people from metropolitan areas to peri-urban and
amenity-rich regions appears again to be accelerating after periods in the 1980s and 1990s
when it seemed unlikely to be sustained. This trend is partly related to wider economic
forces. For example, during periods of relative economic prosperity, metropolitan property
prices rise significantly, which forces new entrants, or those looking for a second home or
to downsize their housing, to look further afield. Also changes such as improved transport
services and infrastructure, particularly along the major corridors connecting Melbourne
with Victoria’s major regional centres, and better telecommunications, have greatly assisted
such trends.

2.4 The Changing Nature of the Rural Landscape

While there are clearly a number of forces working against population movement towards
rural areas, there are also many other factors working to counteract this trend. Barr (2002:5)
has undertaken considerable research in Australia on what he terms the changing nature of
the rural landscape. He notes that the areas experiencing growth can be labelled as ‘amenity
landscapes’. In these areas population in-migration and the subsequent growth in land
values is determined by ‘amenities such as sea views, proximity to town and a pleasant
climate’.

In the Victorian context the areas most likely to absorb the great bulk of this population
flow from the metropolitan area are those that are linked socially, culturally and
economically with the major cities and have attributes that can attract metropolitan
residents and their lifestyle. They are generally areas within the Melbourne sphere and are
places where people want to be, whether just visiting on holiday or permanently residing.
According to Barr, these amenity landscapes ‘exist at the periphery around metropolitan
and major Provincial Centres’ and are also found along the eastern and south western
seabords of Australia.
It is apparent that small towns within the ‘wider regional community’ of a regional centre are often critical to the capacity of the centre to attract what Florida (2003) has termed the ‘creative classes’. These small towns add diversity, arts, lifestyle, housing, heritage, events and environmental settings to what is on offer in the regional centre (Research Planning Design Group 2004). Some regional centres may need to review their attitude to surrounding rural towns, as they are becoming more and more important to the long term development of the region.

2.5 Changing Patterns of Commuting

The economic and social influence of Melbourne is growing wider and the capacity and willingness of people to consider commuting or relocating to more distant areas is increasing. Renkow and Hoover (2000:282) found ‘a growing connectedness of rural and urban places as more and more urban workers take up residences in rural areas’. Green et al (1999:65) also report that some people will opt for long-distance commuting over permanent migration, suggesting that ‘long-distance commuting as a substitute for migration is not merely a temporary phenomenon… although it is a short-term measure for some individuals, it is an established way of life for others’.

This trend is fuelled by improving transport infrastructure and telecommunications, more flexible work arrangements and an emerging, highly mobile workforce. While Melbourne’s sphere of influence has extended, the sphere around major regional centres has also extended in a similar fashion and for similar reasons.

2.6 The New Rural Growth Areas

The social and demographic characteristics of growth areas include being considered ‘trendy’ places to live, and are often associated with boutique primary production such as wine and olive oil. Their economy has few ‘real’ farmers but many sub-commercial and hobby farms. Tourism and recreation visits are strong and that is changing the character of the area by increasing demand for services such as restaurants and coffee shops. The ‘new’ population insists on access to services, education (universities) and health care, and is generally more health- and environmentally-conscious. People demand the best possible technology and communications networks and in many cases are prepared to commute long distances to achieve the lifestyle home location they prefer. They want to live in vibrant communities, and the new settlers maintain their social, family and cultural links to the capital cities (Research Planning Design Group 2004; Regional Development Victoria 2005). Regional areas which are able to tap into these new lifestyle markets are experiencing the greatest growth in terms of population, housing construction rates and property values.
3. About This Study

3.1 Aims and Methodology

The study aims to investigate labour market trends in South Western Victoria. It seeks to identify both macro- and micro-trends within the study area and to be able to analyse these to draw conclusions on possible future scenarios and priorities.

3.2 The Study Area

The region being studied (the Study Area) essentially covers the Glenelg–Hopkins Catchment Management Area. This roughly equates to the Local Government Areas (LGAs) of Glenelg, Moyne, Warrnambool, Colac–Otway, Ararat, and Southern Grampians, as well as the Statistical Local Area (SLA) Pyrenees–South (see Figure 1).

The settlement pattern is characterised by a number of small towns with steady or declining populations. Rural portions of the Study Area have low population densities, producing a settlement pattern with population and employment focussed on the urban areas. Warrnambool is the largest town, with a population of approximately 30,000 persons. Portland and Hamilton, with populations of just under 10,000, are the only other towns with significant populations.
Figure 1: Map of the Study Area
4. Research Findings – Demographic Trends in the Study Area

4.1 General Population Trends

Data in this section are taken from the 2001 Census of Population and Housing, undertaken by the Australian Bureau of Statistics, unless otherwise stated.

The region is experiencing an overall population decline. At the 2001 Census the total population of this region was 110,461 showing an approximate 2% decline from the 1991 level of 112,790.

All LGAs experienced population decline between 1991 and 2001, with the exception of Warrnambool, where the population increased by 13%. At the other end of the scale, Pyrenees–South declined by 11%, and Ararat by 9%.

In 2001, the median age of the population was 38 years, an increase from the 33 years recorded in 1991. All LGAs recorded increases in median age. In 2001, Warrnambool had the lowest median age, at 34 years, whereas the median age in Pyrenees–South, Ararat and Southern Grampians was 40 or more years.

The increase in the median age is reflected in the changing structure of the population. The population pyramids below (see Figures 2 and 3) show that there has been an increase in the proportion of persons in the middle and older age groups, and a decline in the proportion of persons aged 15-34. In 1991, the age structure still somewhat resembled a pyramid, except for a noticeable indentation for persons aged in their twenties. By 2001, the age structure had shifted significantly, with the indentation expanding to persons aged in their 20s and 30s, resulting in a noticeable bulge in persons aged in their 40s and 50s. Much as this, as will be discussed further, is the result of an out-migration of young adults from the region.

This trend suggests that in the future, there will be a lower number of persons in the younger age groups, resulting in a ‘top heavy’ age pyramid. In 2001, there were fewer persons in the 0-4 years age group, compared with persons aged 5-14. While declining fertility may explain part of this trend, there are also fewer persons in the child-bearing age groups in 2001 compared to 1991. Continuing out-migration from the region will exacerbate these demographic trends and have impacts on the labour market of the region.
4.2 Internal Migration

Examining internal migration patterns can provide a clue as to the nature of demographic change in an area, particularly over time. One of the questions on the Census form seeks information on the usual address of the respondent five years earlier. This provides an indication of internal migration patterns from one Census to the next, with data being available at the SLA level.

A limitation of this data is that while a person may live in the same SLA as they did five years ago, they may not necessarily live at the same address. Also, the Census does not capture all movement, but essentially only measures two points in time, in this case 1996 and 2001, and it does not indicate the reason for moving.

Table 1: Migration Flows Out of SLAs in the Study Area 1996-2001

<table>
<thead>
<tr>
<th>Usual Residence 1996</th>
<th>Usual Residence 2001</th>
</tr>
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<tr>
<td></td>
<td>Same SLA</td>
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<tr>
<td>Corangamite (S)–North</td>
<td>7132</td>
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<tr>
<td>Corangamite (S)–South</td>
<td>5693</td>
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<tr>
<td>Glenelg (S)–Heywood</td>
<td>4269</td>
</tr>
<tr>
<td>Glenelg (S)–North</td>
<td>2649</td>
</tr>
<tr>
<td>Glenelg (S)–Portland</td>
<td>7403</td>
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<tr>
<td>Moyne (S)–North-East</td>
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<tr>
<td>Moyne (S)–North-West</td>
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<tr>
<td>Moyne (S)–South</td>
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<td>S. Grampians (S)–Hamilton</td>
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<td>S. Grampians (S)–Balance</td>
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<td>Ararat (RC)</td>
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<tr>
<td>Pyrenees (S)–South</td>
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</tr>
</tbody>
</table>

(a) Includes persons who do not have a usual address, or did not specifically state their usual address

Table 1 shows that around three-quarters of persons in the Study Area lived in the same SLA in 1996 and 2001. Warrnambool had the highest proportion of people living within the same SLA as they did five years earlier (81.6%), followed closely by Corangamite–South (81.3%) and Ararat (80.1%).

People who previously lived in the SLAs in Moyne and Southern Grampians–Balance were most likely to have moved only as far as another SLA within the Study Area. Persons previously living in Pyrenees–South and Ararat were most likely to move to an SLA elsewhere in Victoria. A significant proportion of this movement was to Ballarat, which is not surprising given the relative proximity of these areas to that regional city.
In terms of the proportion of persons moving to the Melbourne Statistical Division, these were fairly evenly spread across all SLAs, with only about 1 in 20 persons moving to the State capital.

The SLAs of Glenelg–North and Glenelg–Portland recorded a higher proportion of persons who had moved interstate, which is most likely due to their proximity to the South Australian border.

### Table 2: Migration Flows Into SLAs in the Study Area 1996-2001

<table>
<thead>
<tr>
<th>Usual Residence 2001</th>
<th>Usual Residence 1996</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Same SLA</td>
</tr>
<tr>
<td>Corangamite (S)–North</td>
<td>7132</td>
</tr>
<tr>
<td>Corangamite (S)–South</td>
<td>5693</td>
</tr>
<tr>
<td>Glenelg (S)–Heywood</td>
<td>4269</td>
</tr>
<tr>
<td>Glenelg (S)–North</td>
<td>2649</td>
</tr>
<tr>
<td>Glenelg (S)–Portland</td>
<td>7403</td>
</tr>
<tr>
<td>Moyne (S)–North-East</td>
<td>1773</td>
</tr>
<tr>
<td>Moyne (S)–North-West</td>
<td>2074</td>
</tr>
<tr>
<td>Moyne (S)–South</td>
<td>7006</td>
</tr>
<tr>
<td>S. Grampians (S)–Hamilton</td>
<td>6459</td>
</tr>
<tr>
<td>S. Grampians (S)–Wannon</td>
<td>1830</td>
</tr>
<tr>
<td>S. Grampians (S)–Balance</td>
<td>3711</td>
</tr>
<tr>
<td>Warrnambool (C)</td>
<td>20081</td>
</tr>
<tr>
<td>Ararat (RC)</td>
<td>8435</td>
</tr>
<tr>
<td>Pyrenees (S)–South</td>
<td>2180</td>
</tr>
</tbody>
</table>

(a) Includes persons who did not have a usual residence, or did not specifically state their usual address

Migration flows into the Study Area (Table 2) show some variations. There is some evidence of a coastward movement, as shown by the higher proportions of persons moving to Moyne–South (10.0%), and Glenelg–Heywood (9.6%), but 9.8% of persons moving to Southern Grampians–Balance came from other parts of the Study Area.

Persons moving from the Melbourne Statistical Division or other parts of regional Victoria comprised a small percentage of persons (less than 5%), with the exception of Pyrenees–South (6.2% from Melbourne, 7.8% from other regional Victoria). The low proportion of persons moving from Melbourne may be related to distance and indicates that the ‘sea change’ phenomenon may not yet be operating in this part of Victoria. However, that could change in the future as people are ‘priced out’ of coastal locations closer to Melbourne.

Migration from interstate and overseas comprised an even smaller proportion of movement into the SLAs in the Study Area. Interstate migration was slightly more important in Glenelg–North and Glenelg–Portland, which, as mentioned above, may be a reflection of their location adjacent to the South Australian border. Overseas migration was a very minor component of inward movement into the Study Area, comprising less than 1,000 persons.
Table 3: Net Migration Flows (a), SLAs in the Study Area 1996-2001

<table>
<thead>
<tr>
<th>SLA</th>
<th>Persons Moving In</th>
<th>Persons Moving Out</th>
<th>Net Migration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corangamite (S)–North</td>
<td>1345</td>
<td>2027</td>
<td>-682</td>
</tr>
<tr>
<td>Corangamite (S)–South</td>
<td>1033</td>
<td>1306</td>
<td>-273</td>
</tr>
<tr>
<td>Glenelg (S)–Heywood</td>
<td>1139</td>
<td>1238</td>
<td>-99</td>
</tr>
<tr>
<td>Glenelg (S)–North</td>
<td>513</td>
<td>809</td>
<td>-296</td>
</tr>
<tr>
<td>Glenelg (S)–Portland</td>
<td>1670</td>
<td>2532</td>
<td>-862</td>
</tr>
<tr>
<td>Moyne (S)–North-East</td>
<td>451</td>
<td>588</td>
<td>-137</td>
</tr>
<tr>
<td>Moyne (S)–North-West</td>
<td>456</td>
<td>684</td>
<td>-228</td>
</tr>
<tr>
<td>Moyne (S)–Portland</td>
<td>2061</td>
<td>1980</td>
<td>81</td>
</tr>
<tr>
<td>Moyne (S)–South</td>
<td>2061</td>
<td>1980</td>
<td>81</td>
</tr>
<tr>
<td>S. Grampians (S)–Hamilton</td>
<td>1759</td>
<td>2022</td>
<td>-263</td>
</tr>
<tr>
<td>S. Grampians (S)–Wannon</td>
<td>373</td>
<td>602</td>
<td>-229</td>
</tr>
<tr>
<td>S. Grampians (S)–Balance</td>
<td>971</td>
<td>1141</td>
<td>-170</td>
</tr>
<tr>
<td>Warmambool (C)</td>
<td>5318</td>
<td>4537</td>
<td>781</td>
</tr>
<tr>
<td>Ararat (RC)</td>
<td>1525</td>
<td>2101</td>
<td>-576</td>
</tr>
<tr>
<td>Pyrenees (S)–South</td>
<td>599</td>
<td>811</td>
<td>-212</td>
</tr>
</tbody>
</table>

(a) Does not include persons who did not state their usual residence in 1996, nor persons who were resident in the Study Area in 1996 and have since moved overseas. As a result, total movements are understated and the figures can serve as a guide.

These data serve to illustrate that internal migration is not a major contributor to population growth in the Study Area. As can be seen in Table 3, only two SLAs experienced net migration flows. These are Warrnambool (781 persons) and Moyne–South (81 persons). The largest outflow was from Glenelg–Portland (862 persons), followed by Corangamite–North (682) and Ararat (576).

Table 4: Resident in the Same SLA in 1996 and 2001, by Age Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Proportion of People Resident in the Same SLA in 1996 and 2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-14</td>
<td>77.1%</td>
</tr>
<tr>
<td>15-24</td>
<td>69.7%</td>
</tr>
<tr>
<td>25-34</td>
<td>61.7%</td>
</tr>
<tr>
<td>35-44</td>
<td>77.8%</td>
</tr>
<tr>
<td>45-54</td>
<td>83.7%</td>
</tr>
<tr>
<td>55-64</td>
<td>84.0%</td>
</tr>
<tr>
<td>65-74</td>
<td>86.1%</td>
</tr>
<tr>
<td>75+</td>
<td>83.5%</td>
</tr>
<tr>
<td>Total</td>
<td>72.3%</td>
</tr>
</tbody>
</table>

Although it is commonly believed that 15-24 year olds are the most mobile age group, in the case of this Study Area, the 25-34 year olds were more mobile by 8%. Interestingly, the likelihood of remaining resident in the same SLA increases after the age group, 25-34 years, but decreases slightly for persons aged 75 years and over. This may reflect a tendency to move residence in the later years of life associated with failing health.

Just over one in five persons moving into the Study Area between 1996 and 2001 was aged 25-34 years. Persons from the Melbourne Statistical Division and Other Regional Victoria comprised a quarter each of the in-migrants (see Table A: Persons Not Resident in the Study Area in 1996, Where Did They Come From? in Appendices).

Persons aged 25-34 years were far more likely to have come from the Melbourne Statistical Division than the other age groups. One quarter of persons from the MSD were in this age group, followed by 35-44 years olds and 5-14 years at 16.2% each.
Almost 60% of persons from other Regional Victoria were aged 5-34, which may be indicative of young families moving.

The most common source area for in-migrants was Other Regional Victoria, comprising just over one-quarter of persons. The number of people moving from the Melbourne Statistical Division and Interstate were similar, while overseas migration was relatively insignificant.

4.3 The Regional Role of Warrnambool

Warrnambool is the largest urban centre in the Study Area and is one of the few parts of the region experiencing population growth. In terms of intra-regional migration, the flows in from other parts of the Study Area (1,895) are far larger than flows out (1,086) (see Table 5). Almost half the people moving into Warrnambool from other parts of the Study Area came from the surrounding SLA of Moyne–South. The flow in the opposite direction was also quite significant, accounting for almost 60% of flows to other parts of the region.

Flows into Warrnambool from other SLAs in the Study Area were larger than flows in the opposite direction, except for Pyrenees–South (but very small numbers).

| Table 5: Warrnambool – Migration To and From Other Parts of the Study Area 1996-2001 |
|---------------------------------|-----------------|-----------------|----------------|
|                                 | To Warrnambool  | From Warrnambool| Difference     |
| Corangamite (S)–North           | 223             | 64              | 159            |
| Corangamite (S)–South           | 187             | 90              | 97             |
| Glenelg (S)–Heywood             | 49              | 21              | 28             |
| Glenelg (S)–North               | 31              | 10              | 21             |
| Glenelg (S)–Portland             | 119             | 61              | 58             |
| Moyne (S)–North-East             | 96              | 56              | 40             |
| Moyne (S)–North-West            | 166             | 69              | 97             |
| Moyne (S)–South                 | 815             | 628             | 187            |
| S. Grampians (S)–Hamilton       | 102             | 34              | 68             |
| S. Grampians (S)–Wannon         | 17              | 3               | 14             |
| S. Grampians (S)–Balance        | 46              | 20              | 26             |
| Ararat (RC)                     | 41              | 26              | 15             |
| Pyrenees (S)–South              | 3               | 4               | -1             |
| Total                           | 1895            | 1086            | 809            |
| Melbourne Statistical Division  | 1064            | 1382            | -318           |
| Other Regional Victoria         | 1114            | 1052            | 62             |

These data indicate that the descriptive label of ‘sponge city’ could be applied to Warrnambool. A sponge city is a city located in rural Australia that has experienced positive population growth in the last quarter of the 20th century, but which is positioned within broader regions of population decline (Salt 2001:178). In other words, the sponge city is ‘soaking up’ the population of surrounding areas. However it also needs to be remembered that there are significant migration flows occurring in the opposite direction, and to other areas, i.e. Melbourne and other parts of regional Victoria, as shown in Tables 1
and 2. In addition, there are more complexities involved than migration flows in the population dynamics of regions, e.g. the contribution of births and deaths to population growth.

4.4 Population Projections

Population projections for LGAs in Victoria have been undertaken by the Department of Sustainability and Environment (DSE) using the 2001 Census as a base figure and making a number of assumptions about future rates of fertility, mortality and immigration. The results of these assumptions have been graphed and are displayed in Figure 4. More detailed graphs for specific shires in the Study Area can be found in Figures A-G in the Appendices.

Overall, the population of the Study Area is projected to increase by about 3% over the period 2003-2031. This masks regional variation within the Study Area, as the increase is driven by growth in Warrnambool, which is expected to grow by a third in this period. Most SLAs in the Study Area are expected to decline in population. The expected decline is greatest in Moyne North–West (45%) and Moyne North–East (42%). All SLAs in Southern Grampians Shire are projected to decline during this time, particularly the rural SLAs, Southern Grampians–Wannon (by 26.0%) and Southern Grampians–Balance (by 27.5%).

Figure 4: Projected population, Study Area 2003-2031

Source: Department of Sustainability and Environment
4.5 Households and Dwellings

Data from the 2001 Census showed that the overwhelming majority of dwellings (90.3%) were separate houses, and a further 5.1% were flats, units or apartments. The number of dwellings in the Study Area increased by 7.6% between 1991 and 2001, which is in contrast to the 2% population decline discussed above. The number of public housing dwellings has declined by 22% since 1991 and now comprises just 3.6% of all dwellings.

The highest median house prices, based on preliminary 2004 figures, are in Warrnambool ($236,750), closely followed by Moyne ($230,000). These coastal LGAs are experiencing much in-migration, as well as significant holiday home building. Glenelg, another coastal LGA, had the next highest median price ($150,000), but its relative isolation may be affecting demand for properties. At the other end of the scale, Ararat had a median house price of just $89,500. These figures compared with a median price of $169,500 for all of regional Victoria.

While median prices have risen steadily in all areas since 1985, most of the increase has occurred in the last five years. Prices have doubled in Moyne, Warrnambool and Pyrenees since 1999 (see Figure 5). Warrnambool’s median house price only reached $100,000 in 1997, but has more than doubled since that time. Moyne didn’t reach this milestone until 1999, but has subsequently experienced similar growth.

Figure 5: Median House Prices 1985-2004

Note: Statistics for 2004 are based on a small number of sales and are preliminary only.

Since 1985, the largest increase in median house price was recorded in Moyne (400%),
followed by Warrnambool (293%) and Pyrenees (271%). This compares with an increase of 265% for regional Victoria as a whole.

Ararat’s median house price recorded an increase of 163% over the 20-year period. While there was steady growth up to 1990, when the median price was $60,000, it wasn’t until 2002 that there was any further significant growth. For many years in the 1990s, house prices in Ararat were below 1990 figures.

Median house prices in Warrnambool were higher than the median price for regional Victoria for the entire period 1985-2004. From 1996 onwards median house prices in Moyne have been higher than that of regional Victoria. In the other LGAs in the Study Area, the median house price has been lower than that for all of regional Victoria, except on one occasion in Glenelg.

The Department of Human Services produces a quarterly rental report which calculates the median rental price for various types of properties. These figures show that over the two year period, the median rent rose in all LGAs, although the rise in Ararat was only minor. The steepest rise, in absolute and relative terms, was in Moyne. Throughout the period, median house prices were most expensive in Warrnambool, where the median was similar to that for the Melbourne metropolitan area. (For more detail, see Table B: Median Rent, Three Bedroom Houses in LGAs in the Study Area in the Appendices.)

4.6 Recent Labour Market Statistics

The Department of Workplace Relations produces labour force estimates for SLAs on a quarterly basis. The figures are derived from ABS (Monthly Labour Force Survey and 2001 Census Labour Force Data) and Centrelink statistics. Figures for the September 2004 quarter are shown in the table below.

| Table 6: Labour Market Summary for South Western Victoria, September 2004 |
|--------------------------------------------------|-----------------|-----------------|-----------------|
| Unemployed | Unemployment Rate | Labour Force |
| Ararat (RC) | 388 | 7.2% | 5404 |
| Corangamite–North | 223 | 5.0% | 4451 |
| Corangamite–South | 124 | 3.1% | 4006 |
| Glenelg–Heywood | 242 | 7.7% | 3132 |
| Glenelg–North | 88 | 5.5% | 1607 |
| Glenelg–Portland | 535 | 10.8% | 4967 |
| Moyne–North East | 56 | 4.5% | 1246 |
| Moyne–North West | 48 | 3.1% | 1533 |
| Moyne–South | 239 | 4.6% | 5195 |
| Pyrenees–South | 134 | 9.6% | 1402 |
| Southern Grampians–Hamilton | 279 | 6.6% | 4256 |
| Southern Grampians–Wannon | 72 | 6.2% | 1159 |
| Southern Grampians–Balance | 158 | 5.8% | 2727 |
| Warrnambool | 1057 | 7.4% | 14239 |
| Total for Region | 3643 | 6.6% | 55324 |

Source: Department of Workplace Relations

Note: The ABS conducts a monthly labour force survey, however, due to the sample size estimates for small geographic areas are not possible due to large standard errors.
While the unemployment rate for the entire region was 6.6%, there was wide variation. The highest rates were recorded in Glenelg–Portland (10.8%) and Pyrenees–South (9.6%). At the other end of the scale, Corangamite–South and Moyne–North West recorded an unemployment rate of 3.1%.

Since March 2002, unemployment rates in the SLAs within the Study Area have tended to increase. Glenelg–Portland recorded the largest increase in the period March 2002 to September 2004, of four percentage points (6.8% to 10.8%). All SLAs in the Study Area recorded an increase in the unemployment rate of at least one percentage point over the two and a half year period.

**Figure 6: Unemployment Rates 2002-2004**

Source: Department of Workplace Relations
Note: A time series back to March 2002 is not available for Ararat or Moyne–North East. This is due to an SLA boundary change, which, although it occurred some years ago, was not implemented in the DEWR labour market series until the December 2002 quarter.

The only SLA to record an increase in the size of the labour force between March 2002 and September 2004 was Warrnambool. For these time periods, the figures were 14,213 and 14,239 respectively, representing an increase of 0.2%. At the same time, the unemployment rate in Warrnambool increased from 5.3% to 7.4%, due to a 40% increase in the number of unemployed persons.

Over the 30-month period, Glenelg–North and Southern Grampians–Wannon fared the worst in terms of labour force indicators. Both SLAs recorded an increase in the number of unemployed persons of about two-thirds, while the size of the labour force declined by 15.4% and 13.0% respectively.
4.7 Source of Income

There are a significant number of people in the Study Area whose main source of income is through Centrelink payments. While a proportion of these are unemployed, many others received payments such as the Age Pension or Disability Support Pension. (See Table C: Persons Receiving Selected Centrelink Payments, June 2002 in the Appendices for the number of people in receipt of FACS payments at June 2002.)

Warrnambool had the highest number of persons in receipt of Centrelink payments at June 2002, which is largely a function of its population size. To obtain a comparative measure across the LGAs in the Study Area, the ratio of Centrelink recipients to employed persons was compared. Pyrenees had the highest ratio, at 65:7, meaning that the number of persons in receipt of Centrelink payments was about two-thirds that of employed persons. At the other extreme, the ratio in Corangamite was 39:4. For Regional Victoria as a whole, it was 58:1.

4.8 Education

Increasingly, the possession of post-school qualifications determines a person’s success in securing meaningful employment in the contemporary labour market. In all SLAs in the Study Area, the proportion of persons without a post-school qualification was higher than the Victorian average of 53.7%. Southern Grampians–Balance, Warrnambool and Ararat each had about 57% of persons without a post-school qualification, compared to Glenelg–North where 65.6% of persons did not have a post-school qualification.

About one in seven Victorians aged 15 years and over possessed a university level qualification\(^1\), but the proportion was lower in the Study Area. Just over 10% of persons in Warrnambool had a university level qualification, perhaps reflecting the location of a Deakin University campus and greater job diversity. Southern Grampians–Hamilton, Southern Grampians–Balance and Moyne–South each had around 8% of persons with a university level qualification. This compares with around 5% for Glenelg–North and Pyrenees–South.

Interestingly, the proportion of persons with TAFE level qualifications\(^2\) was also lower in the Study Area SLAs than the Victorian average (20.7%), but when qualifications at the certificate level are considered only, the Study Area compares favourably with the Victorian average (14.5%). The highest was in Glenelg–Portland, where 17.9% of persons had a certificate level qualification, compared with 12.8% in Glenelg–North. Qualifications at the certificate level are those commonly associated with the trades.

There is some relationship between the highest level of post-school qualification completed, and the unemployment rate. At the time of the 2001 Census, the unemployment rate for the Study Area was 6.0%. This compares with less than 3% for persons with university qualifications, and 7.4% for those without a post-school qualification. Persons with TAFE qualifications had a low unemployment rate if they had a more advanced

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\(^1\) University level qualifications are Postgraduate and Graduate Diploma, Graduate Certificate, and Bachelor degree.

\(^2\) TAFE level qualifications are Advanced Diploma and Diploma, and Certificate level.
certificate, e.g. Certificate Level IV had an unemployment rate of 4.2%, but the reverse was true for persons with a Certificate I (17.6%) or II (15.3%). This pattern of unemployment was mirrored in Victoria as a whole.

<table>
<thead>
<tr>
<th>Post-School Qualification</th>
<th>Proportion in Study Area</th>
<th>Proportion in Victoria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postgraduate Degree</td>
<td>2.0%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Graduate Diploma or Certificate</td>
<td>0.7%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Bachelor Degree</td>
<td>2.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Advanced Diploma or Diploma</td>
<td>3.1%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Certificate Level IV</td>
<td>4.2%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Certificate Level III</td>
<td>3.8%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Certificate Level III or IV NFD</td>
<td>4.9%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Certificate Level II</td>
<td>15.3%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Certificate Level I</td>
<td>17.6%</td>
<td>13.8%</td>
</tr>
<tr>
<td>Certificate Level I or II NFD</td>
<td>5.2%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Certificate Level NFD</td>
<td>13.0%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Not applicable (a)</td>
<td>7.4%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Total</td>
<td>6.0%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

Source: 2001 Census of Population and Housing
(a) Not applicable refers to persons in this table who do not have a post-school qualification, or whose qualification is outside the scope of the Australian Standard Classification of Education
(b) NFD – Not Further Defined

4.9 Service Provision in the Study Area

Long term population decline in rural Australia has resulted in the withdrawal of services, both public and private, in more recent years. Service decline comes in many forms, from the closure of a bank branch, to the amalgamation of government functions, most clearly seen by the amalgamation of local governments in Victoria during the mid 1990s. The continuing cycle of population decline and service withdrawal is cumulative. As population declines, it becomes less economical to maintain service provision, and eventually critical population benchmarks are breached, with results in the service being withdrawn from a town all together. This leads to further population loss as employment opportunities contract and people are forced away to find work elsewhere. An additional impact is the loss of community leaders and social fabric, giving rise to the popular media images of ‘dying towns’.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>23</td>
</tr>
<tr>
<td>Primary Schools</td>
<td>51</td>
<td>47</td>
<td>40</td>
<td>43</td>
<td>43</td>
</tr>
<tr>
<td>Secondary Schools</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>20</td>
<td>15</td>
</tr>
<tr>
<td>Consolidated Schools</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Banks</td>
<td>74</td>
<td>81</td>
<td>66</td>
<td>67</td>
<td>50</td>
</tr>
</tbody>
</table>

Source: Telephone directory, various issues
Various issues of the telephone directory were used to attempt to measure the extent of this decline. Three services were chosen for this analysis – hospitals, schools and banks. These are services important from a social capital perspective as they provide community focal points and also act as significant employers in rural areas. However, as can be seen from the data in the table, the 20 years between 1980 and 2000 witnessed a gradual decline in these services from the towns in the Study Area. This was particularly true in the case of banks which lost one third of branches in this time period. Only hospitals recorded an increase in services, but this was very minor.

These data have limitations in that they really measure the existence of a telephone number, and give no indication, for example, of the number of beds a hospital may contain. It should also be noted that data was collected for towns only, so that if a service had been located in a rural area, it would not have been picked up in this particular analysis. Nevertheless, the numbers suggest a gradual pattern of service decline.

The Commonwealth Government initiative, the Rural Transaction Centres Program, provides funding for towns to establish a Rural Transaction Centre (RTC) to provide access to various services, which can include banking, postal, and a range of government services. At February 2005, there were 30 RTCs across Victoria, three of which were in the Study Area (Glenthompson, Lake Bolac and Willaura) (DOTARS 2005). However, it is debatable whether the RTCs replaced the jobs that were lost when the original service was withdrawn. The evidence suggests that employment in the finance and insurance industry, for example, is much lower in 2001 compared to previous years.

4.9.1 Hospitals

In the period 1993-94 to 2002-03, two small hospitals at Koroit and Macarthur were closed. In addition, hospitals at Mortlake and Lismore ceased acute inpatient services in 1994. Closure of smaller rural hospitals means that the remaining population has to travel further for health treatment, and also impacts on communities in terms of job loss.

The average number of public hospital beds declined by 12.1%, from 529 to 472. Much of this occurred in the period 1993-94 to 1996-97, with average bed numbers falling below 470 in 1998-99 and 2001-02. Much of the initial decline should be viewed in the context of major cuts to public hospitals in the early years of the Kennett government. In addition, the introduction of casemix funding during the mid 1990s has meant that hospitals are required to provide more detail about the types of patients they are treating, which determines the amount of funding they are entitled to.

The two largest public hospitals are located at Warrnambool and Hamilton. South West Healthcare at Warrnambool has been relatively stable in terms of average hospital bed numbers, with a low of 138 in 2001-02 and a high of 156 in 1994-95. Western District Health Service, with campuses at Hamilton and Penshurst, recorded a drastic decline in average bed numbers, from 107 in 1993-94 to 68 for the period 1996-97 to 1999-2000. Average bed numbers then rose to 98 and remained steady until 2002-03.

There is one private hospital in the Study Area – St John of God Health Care, located at Warrnambool. Established in 1939, it has 70 beds available.
Table 9: Public Hospitals in Western Victoria, Average Bed Numbers 1993-2003

<table>
<thead>
<tr>
<th></th>
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<tr>
<td>Casterton Memorial Hospital</td>
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<td>18</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>17</td>
<td></td>
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<tr>
<td>Coleraine District Health Services</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>South West Healthcare, Corangamite</td>
<td>36</td>
<td>31</td>
<td>28</td>
<td>31</td>
<td>28</td>
<td>19</td>
<td>21</td>
<td>22</td>
<td>22</td>
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<tr>
<td>Heywood Rural Health (a)</td>
<td>12</td>
<td>11</td>
<td>11</td>
<td>12</td>
<td>18</td>
<td>7</td>
<td>5</td>
<td>4</td>
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</tr>
<tr>
<td>Koroit</td>
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<td>0</td>
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<td>0</td>
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<td>0</td>
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<tr>
<td>Moyne Health Services</td>
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<td>20</td>
<td>18</td>
<td>18</td>
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<td>71</td>
<td>72</td>
<td>65</td>
<td>69</td>
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<tr>
<td>Terang &amp; Mortlake Health Service</td>
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<td>Timboon &amp; District Health Care Service</td>
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<td>19</td>
<td>19</td>
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<td>17</td>
<td>13</td>
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<tr>
<td>South West Healthcare, Warrnambool</td>
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<td>151</td>
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<td>139</td>
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<tr>
<td>Western District Health Service</td>
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<td>491</td>
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<td>480</td>
<td>463</td>
<td>484</td>
<td>472</td>
<td>472</td>
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</tr>
</tbody>
</table>

Source: Department of Human Services
(a) Heywood Rural Health may include aged care beds.

4.9.2 Internet Access

The 2001 Census included for the first time questions as to whether individuals accessed the Internet at home, work or other place. Usage of the Internet is an indicator that a town has access to the appropriate communications infrastructure, and to some extent may maintain access to services that have been withdrawn, e.g. online banking.

Across the Study Area, more than one quarter of persons accessed the Internet in the week prior to the Census (29.6%). Higher proportions accessed the Internet in Bushfield-Woodford (39.4%) and Lake Bolac (35.6%). At the other end of the scale, less than one in five persons in Coleraine, Penshurst and Willaura accessed the Internet in the week prior to the Census.
Internet access shows some correlation with age. For towns in south western Victoria, about 45% of 5-17 year olds and 18-24 year olds accessed the Internet in the week prior to Census, and this proportion declined with age.

**Figure 7: Internet Use in South West Victoria**

<table>
<thead>
<tr>
<th>Age group</th>
<th>Proportion</th>
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<tbody>
<tr>
<td>5-17</td>
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<tr>
<td>18-24</td>
<td>45.0%</td>
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<tr>
<td>25-34</td>
<td>45.0%</td>
</tr>
<tr>
<td>35-44</td>
<td>35.0%</td>
</tr>
<tr>
<td>45-54</td>
<td>25.0%</td>
</tr>
<tr>
<td>55-64</td>
<td>15.0%</td>
</tr>
<tr>
<td>65+</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

### 4.10 Population and Labour Market Change in the LGAs, 1981–2001

This section examines aspects of population and labour market change in the six LGAs in the Study Area. The general trend is one of population stagnation or decline, particularly in the rural portions. Much of this is a result of the out-migration of young persons, which has another demographic impact, in that the proportion of older persons increases substantially.

The labour market in the Study Area is characterised by employment in a narrow range of industries, namely agriculture, retail trade, and health and community services. Some towns differ from this pattern in that the manufacturing and education sectors are important employers, while others, particularly in coastal locations, have more employment in sectors servicing the tourist economy.

#### 4.10.1 Ararat Rural City

The Rural City of Ararat is located in the north eastern part of the Study Area. Ararat is the dominant urban settlement in the municipality, with Willaura the other locality of significant size. The figure below shows that the municipality has recorded declining population over the last 20 years.
In 1981, the population was 12,631, but had declined to 11,101 by 2001, representing a decline of 12.1%. All parts of the municipality recorded population decline. In relative terms, population loss was particularly acute in the small town of Willaura (23.6%), but it was also quite significant in Ararat, which, as the largest town, recorded the largest absolute decline. In 1981, the population of Ararat was 8,336, but this had fallen to 6,890 by 1996 (17.3%), before increasing slightly to 7,052 in 2001.

**Figure 8: Population Change, Ararat 1981-2001**

The population of the rural portion of Ararat (RC) fluctuated over the 20-year period, but was 139 persons less in 2001 compared to 1981, a 3.7% decrease.

In terms of the rural/urban split within the municipality, there was little change. In 1981, about 70% of the population lived in Ararat or Willaura, and this had declined to 68% by 2001. In other words, the rural proportion of the LGA’s population had increased slightly.

**Figure 9: Rural/Urban Split, Ararat 1981-2001**
The age composition of the population has changed considerably over the 20-year period. Population ageing is occurring, but the major trend has been a decline, in both absolute and relative terms, of persons in the younger age ranges. The decline in rural youth populations has been well documented. It has far reaching implications in economic and social contexts.

**Figure 10: Age Composition, Ararat 1981-2001**

In all areas, there were fewer persons in the younger age groups in 2001 when compared to 1981. Only at age 35 years or more was there an increase in the number of persons. In Ararat, there was a decline of 640 persons in the age group 5-17 years (about one-third). This, for an age group that generally equates to school years, has profound implications for the provision of educational services. However, the loss of persons in the age group 18-24 years was more dramatic. Essentially, there were half the number of persons in this age group in 2001 when compared to 1981 in the municipality.

**Figure 11: Age Composition, Rural Balance of Ararat (RC) 1981-2001**
Ararat (RC) has experienced a decline in the number of employed persons in the municipality since 1981. This decline has been more pronounced in the urban areas. Willaura recorded a 38% decline in the number of employed persons between 1981 and 2001, and the equivalent figure for Ararat was 7%. The number of employed persons in the remainder of the municipality has fluctuated from a high of 1,806 in 1986, to a low of 1,659 in 1991. However, the figures for 1981 and 2001 are similar.

**Figure 12: Employed Persons, Ararat(RC) 1981-2001**

![Employed Persons Chart]

The number of unemployed persons has mirrored trends across Australia, with a peak in 1991 at the onset of the early 1990s recession. Across the municipality numbers of unemployed persons have declined since this time, although they remained high in the rural area until the 1996 Census. The number of unemployed persons is now similar to levels recorded in 1986, but higher than in 1981.

**Figure 13: Unemployed Persons, Ararat(RC) 1981-2001**

![Unemployed Persons Chart]
The unemployment rate followed a similar trend in numbers of unemployed persons. In 2001, the unemployment rate for Ararat was 7.8%, for Willaura 8.3%, and the Rural Balance 3.6%. This compares with a Victorian average of 6.8%.

Figure 14 shows the proportion of persons employed by industry in the urban centre of Ararat over a 20-year time period. Over this time the composition of the working population has changed. The proportion of persons employed in health and community services has declined, from a high of 23.3% in 1986, to 15.1% in 2001. Manufacturing and retail are other important industries.

![Figure 14: Employment by Industry, Ararat 1981-2001](image)

The composition of the working population is considerably different in the rural area of the Shire, being dominated by persons employed in agriculture. This is despite a trend away from employment in this sector. In 1981, there were 1,099 persons employed in agriculture, comprising 61.8% of employed persons. The equivalent figures in 2001 were 825 and 46.3%. Most of this decline occurred after 1986. Despite the 25% decline in employment in agriculture, the number of employed persons in the rural balance of Ararat was similar in both 1981 and 2001, due to small gains in other industries such as retail trade and manufacturing.

### 4.10.2 Corangamite

Corangamite Shire is located in the south eastern part of the Study Area. There are three towns with a population of 1,000 or more persons – Camperdown, Cobden, and Terang.

The population of the Shire has been in decline since 1981, and has been particularly rapid in the rural part, recording a decline of 24.4%.

The largest town, Camperdown, had a population of 3,545 in 1981, and this declined to 3,130 in 2001 (a reduction of 11.7%). Terang recorded a similar population decline, from
2,111 in 1981 to 1,862 in 2001. Cobden, the third largest town, recorded a small decline of 2.3% over the same time period.

The smaller towns in the Shire also recorded large population declines, with some exceptions. The small town of Lismore recorded a decline of 21%, from 338 in 1981 to 267 in 2001. Derrinallum and Skipton recorded declines of around 10%. In contrast, Noorat and Timboon recorded slight increases. The outstanding exception in the Shire is Port Campbell, with an increase of 171%, from 169 persons in 1981, to 459 in 2001. Located on the coast in a particularly scenic part of Victoria, the rapid growth rate may be associated with amenity and lifestyle factors.

Figure 15: Population Change, Corangamite 1981-2001

Despite the large decline in the rural population, the overall split between the urban and rural components was not as large, due to the declining populations in most towns. In 1981, 51.7% of the Shire’s population lived in the rural portion, declining to 45.8% in 2001. The smaller towns increased their share, mainly because of the very rapid growth in Port Campbell.

In common with other parts of the Study Area, the age composition of the towns in Corangamite has changed over the 20-year period. A feature of the three larger towns, and the rural balance, was the decline in the number of persons aged less than 35 years. Of particular note is the large reduction in the number of persons aged 5-17 years.

The aged population has grown rapidly in the larger towns, but has remained relatively steady in the rural balance. This may be a legacy of the provision of aged care and health services in larger centres. The population aged 75 years or more trebled in Cobden over the 20-year period, increasing from 4.5% of the population, to 12.8%. This represents a very rapid ageing of the population and has implications for service provision and labour force participation.
Figure 16: Rural/Urban Split, Corangamite 1981-2001

Figure 17: Age Composition, Camperdown 1981-2001

Figure 18: Age Composition, Cobden 1981-2001
Figure 19: Age Composition, Terang 1981-2001

Figure 20: Age Composition, Port Campbell 1981-2001

Figure 21: Age Composition, Rural Balance of Corangamite 1981-2001
As indicated above, the locality of Port Campbell (Figure 20) has defied the trends evident in other parts of the Shire, and has grown considerably in the last 20 years. The proportion of older persons is stable or declining, while the reverse is true for younger persons. This is also in defiance of trends in other parts of the Shire. In 2001, Port Campbell had the lowest median age of all urban centres in the Study Area, at 32 years.

The number of employed persons in the three largest towns remained fairly steady over the 20-year period, with slight decreases in 1991 at the onset of the recession. In contrast to Ararat regional city, the rural portion of Corangamite has recorded a significant decline in the number of employed persons between 1981 and 2001. This decline was 16.6%, or approximately 800 persons.

Figure 22: Employed Persons, Corangamite 1981-2001

The number of unemployed persons showed a similar trend in the rural balance, and the three largest towns. The peak number of unemployed persons was recorded in 1991, due to the recession. Except in Camperdown, the number of unemployed persons is lower in 2001. However, it is important to note that the labour force participation rate is low in the larger towns, which partly reflects an older population. Labour force participation is highest in the rural balance, which may reflect the tendency for employment on farms.

The composition of the labour force varies in the three larger towns, and has changed over time. Camperdown’s most important sector in 2001 was retail trade, which employed about one in five persons. In 1986 and 1991, manufacturing was the most important sector, but this has declined considerably since 1991. Employment in agriculture and education has been relatively stable, while employment in health has almost trebled as a proportion of employed persons.
Figure 23: Unemployed Persons, Corangamite 1981-2001

Figure 24: Employment by Industry, Corangamite 1981-2001

Manufacturing is more important in Cobden, and has been over the 20-year period. In 2001, about one in five employed persons in that town were employed in manufacturing, compared to about one in seven in retail trade, the next most important sector.
Figure 25: Employment by Industry, Cobden 1981-2001

Terang’s most important sector is retail trade, followed by health. While retail trade has always been important, employment in health has increased considerably during this period.

Figure 26: Employment by Industry, Terang 1981-2001

In common with Ararat (RC), employment in agriculture is dominant in the rural portion of the Shire, but has declined significantly both absolutely and relatively. In 1981, over 3,600 persons were employed in agriculture, comprising 75.4% of employed persons. The equivalent figures for 2001 were 2,400 and 61.2%.
4.10.3 Glenelg

The Shire of Glenelg is located in the western part of the Study Area, next to the South Australian border. The largest town is Portland, with a population of approximately 9,600 in 2001. Other towns with more than 1,000 persons in 2001 are Casterton (1,670) and Heywood (1,220). The population of the Shire reached a peak in 1986, but has been in decline since.

Portland’s population was over 10,000 persons in 1986 and 1991, but has since been in decline. Regardless, in 2001 it was still 2.5% higher than in 1981. Casterton recorded a 14.1% decline in population over the 20-year period.

The two smaller towns in the Shire, Dartmoor and Merino, both recorded a population decline of almost 30% in the 20-year period. The population of the rural balance of the Shire has been declining since reaching a peak of 7,062 in 1986, falling to 6,171 in 2001.

Figure 27: Population Change, Glenelg 1981-2001

Figure 28: Rural/Urban Split, Glenelg 1981-2001
Glenelg’s population distribution has remained relatively stable over the last 20 years. About half of the population live in Portland, and another one-third live in the rural area.

The age composition of Glenelg Shire follows the same trend established elsewhere in the Study Area, that is a declining proportion of young people and an increase in the elderly. In all areas, the proportion of 18-24 year olds declined, in some cases halving.

Figure 29: Age Composition, Portland 1981-2001

Casterton in particular recorded a rapidly increasing elderly population – the proportion of persons aged 75 years doubled between 1981 and 2001, increasing from 6.6% to 13.2%. In 2001, approximately one-third of the population was aged 60 years and over.

Figure 30: Age Composition, Casterton 1981-2001
Figure 31: Age Composition, Heywood 1981-2001

Figure 32: Age Composition, Rural Balance of Glenelg 1981-2001
Heywood and the Rural Balance have a much lower proportion of elderly persons when compared with Portland and Casteron.

The number of employed persons reached a peak in 1986 in most areas. Portland has shown the most variation with a peak of 4,860 persons employed in 1986, falling below 4,000 in 1991 and 1996, before increasing slightly to 4,093 in 2001. However, the number of employed persons in 2001 was 9.0% higher than in 1981, whereas in Casterton, Heywood and the Rural Balance, it was lower.

Figure 33: Employed Persons, Glenelg 1981-2001

The number of unemployed persons over time follows the trend recorded in other LGAs, with a peak in 1991, and a general decline since that time. Portland’s labour market suffered particularly badly in the 1990s recession, as reflected by a doubling in the number...
of unemployed persons between 1986 and 1991 Censuses. However, between 1991 and 2001, the number of unemployed persons declined by approximately 40%, but was still in the region of 10%.

Figure 34: Unemployed Persons, Glenelg 1981-2001

Labour force participation rates are much higher in Portland and the Glenelg Rural Balance, compared to the medium-sized towns in the Shire. For the Rural Balance, this reflects trends recorded elsewhere in the Study Area. In Portland’s case, the higher labour force participation rate may reflect a more diverse labour force created by a larger population servicing a rural hinterland.

The composition of the employment market in Portland has changed over the last 20 years. In particular, there was a decline in the proportion of the workforce employed in the construction industry between 1986 and 1991, from 19.3% to just 6.4%. Thereafter it has remained fairly stable. In absolute terms, this represented a decline from 939 persons in 1986 to 254 persons in 1991.

Manufacturing is the dominant industry in Portland, accounting for 23.4% of employed persons in 2001, followed by retail trade (15.7%) and health (10.1%). Despite the existence of one of the largest ports in Victoria, transport and storage comprised a mere 4.9% of employed persons. This industry sector has been in decline since 1981, when it comprised 9.8% of employed persons.

Figure 35: Employment by Industry, Portland 1981-2001
The composition of the workforce is different in the smaller towns of Casterton and Heywood. The industry sectors important in Casterton have changed little over the 20-year period, with some increase in the proportion of persons employed in health, from 8.1% to 13.3%. The retail sector is by far the most important industry sector, accounting for over 20% of employed persons.

Manufacturing and retail trade are the dominant industry sectors in Heywood and have been so over the last 20 years, increasing their share of employed persons in the latter part of this period. Interestingly, employment in agriculture, while declining sharply in the late 1980s, has been on the increase since 1991.
Figure 36: Employment by Industry, Casterton 1981-2001

Figure 37: Employment by Industry, Heywood 1981-2001
4.10.4 Moyne

The Shire of Moyne is located in the southern part of the Study Area, surrounding the City of Warrnambool. The largest towns are Port Fairy, Koroit and Mortlake. The graph below shows that, despite growth in some parts, the overall trend in the Shire is one of population decline.

Figure 38: Population Change, Moyne 1981-2001

Koroit showed a sharp upward trend between 1996 and 2001, but this was due to an enlargement of the urban centre boundary. Port Fairy has recorded a fluctuating population over the 20-year period, but was still 12.5% larger in 2001 compared to 1981. Mortlake’s population has been steadily declining, falling below 1,000 between the 1991 and 1996 Censuses.

The rural population has been declining steadily since 1981, falling below 10,000 persons between 1996 and 2001. In terms of its proportion of the Shire’s population, it declined from 70.8% in 1981, to 65.0% in 2001. Part of this decline was attributable to the inclusion of the locality of Narrawong in the urban centre classification in 2001. Note that the rural proportion is the highest of all the LGAs in the Study Area.
In common with other parts of the Study Area, the proportion of the population in younger age groups is decreasing, while those in the older age groups are increasing. Once again, the decline is most notable for persons in the 18-24 years age group. Population ageing was particularly notable in Port Fairy, where the proportion of persons aged 75 years and over increased from 5.4% to 13.0% over the 20-year period. In absolute terms, the increase was from 123 to 333, or more than 170%.
Figure 41: Age Composition, Koroit 1981-2001

Figure 42: Age Composition, Rural Balance of Moyne 1981-2001
The number of employed persons increased in both Port Fairy and Koroit over the 20-year period, while it declined in the rural balance. The increase in Koroit occurred between 1996 and 2001, and is likely to be related to the enlargement of the urban centre boundary. The increase in the number of employed persons in Port Fairy was almost 50%, far larger than population growth in the town. At the same time, the labour force participation increased from 49.7% to 55.2%. A substantial proportion of this is related to the town’s development as a tourist destination, as indicated by the high proportion of persons employed in the accommodation, cafés and restaurant industry.

*Figure 43: Employed Persons, Moyne 1981-2001*

The number of unemployed persons peaked in 1991, at the onset of the early 1990s recession. The number of unemployed persons was lower in 2001 than in 1981, in all areas.

*Figure 44: Unemployed Persons, Moyne 1981-2001*
The distinctive feature of the employment structure in Port Fairy is the higher proportion of persons in the accommodation, cafés and restaurant industry. Port Fairy is one of the prime tourist destinations in the region, with a number of hotels and other accommodation facilities. The importance of tourism to the town is reflected in the increasing proportion of persons employed in this industry, from 6.4% in 1981 to 13.2% in 2001. It is the second most important industry, in terms of employment, after retail trade.

Figure 45: Employment by Industry, Port Fairy 1981-2001

Employment in Koroit is more typical of a larger country town, with the most important industries in 2001 being retail (20.0%), manufacturing (16.5%) and health (15.9%). The manufacturing industry recorded a large decline between 1981 and 1986, from 24.4% to 14.7% (or in absolute terms from 85 persons to 52).
4.10.5 Southern Grampians

In common with other LGAs within the Study Area, the population of Southern Grampians Shire has been in decline over the last 20 years. The two largest towns, Hamilton and Coleraine, have lost population. Coleraine’s population declined by 18% between 1981 and 2001 and if the trend continues, is likely to drop below 1,000 persons by the 2006 Census. The rural/urban split has remained relatively stable over the 20-year period. Although Hamilton recorded a decline in population of 6.4%, its share of the Shire’s population increased from 52.2% to 55.3%.
In common with other towns in the Study Area, the population structure is shifting upwards, with a loss of younger persons and an increase in older persons. Despite the presence of an RMIT campus in Hamilton, the proportion of 18-24 year olds declined between 1981 and 2001.

Coleraine in particular aged rapidly with the proportion of persons aged 75 years and over doubling between 1981 and 2001. One in seven people living in Coleraine is aged 75 years or over. In contrast, the number and proportion of people aged 18-34 years declined dramatically.
The Rural Balance of Southern Grampians Shire also showed evidence of ageing, but the proportion of persons aged over 60 was far lower than that found in Hamilton or Coleraine.

The number of employed persons in Hamilton reached a peak of 3,984 in 1986. By 1996, the number of employed persons had fallen to 3,734, a decline of 6%. However, the decline in the number of employed persons in the rural balance of the Shire has been in steady decline since 1981. There were 18% less people employed in the rural balance of the shire in 2001 compared with 20 years earlier.
The spike in the number of unemployed persons reflects the onset of the early 1990s recession. In Hamilton, Coleraine and Rural Balance, the number of unemployed persons has been in decline since 1991.

*Figure 53: Unemployed Persons, Southern Grampians 1981-2001*

The retail sector is the most important employer in Hamilton, which probably reflects its role as a service centre for the rural surrounds. Health services are another major employer, again reflecting Hamilton’s role as a service centre, and as the location of a major hospital.

*Figure 54: Employment by Industry, Hamilton 1981-2001*

Employment in retail trade and health are also important industries in Coleraine. During the period 1981-2001, employment in agriculture increased from 11.3% to 15.7% of employed persons.
Figure 55: Employment by Industry, Coleraine 1981-2001

4.10.6 Warrnambool

Warrnambool is by far the largest town in the Study Area, with a 2001 population of 26,843. The population has grown by 25.4% since 1981. It is the ninth largest urban centre in Victoria.

Note that the urban area of Warrnambool covers a significant proportion of the Shire, therefore figures for the rural balance are not included here.

Figure 56: Population Change, Warrnambool 1981-2001
The age structure of Warrnambool is different from other LGAs in the Study Area. Population ageing is not as pronounced, and the proportion of persons in the 18-24 year age group in particular is relatively high. Part of this is attributable to the location of the Deakin University campus on the eastern outskirts of the city. The median age of the population of Warrnambool in 2001 was 34 years. Surrounding townships such as Allansford and Bushfield-Woodford had a median age of 33 and 34 years respectively.

The most rapid increase was in the proportion of persons aged 35-49, increasing from 15.3% in 1981 to 21.1% in 2001. Numerically, the figures were from 3,270 to 5,656, or a 73% increase.

Warrnambool also has a higher proportion of persons in the 75 years and over age group. This may reflect the presence of higher level health care and aged care facilities in the city. The number of persons in this age group doubled between 1981 and 2001.

*Figure 57: Age Composition, Warrnambool 1981-2001*

*Figure 58: Employment Status, Warrnambool 1981-2001*
The number of employed persons in Warrnambool has increased steadily over the last 20 years, although it slowed during the early 1990s recession. The number of unemployed persons reached a peak of around 1,300 persons in the 1990s, but declined in 2001 as the employment market improved.

As with other parts of the Study Area, the composition of the employment market in Warrnambool has undergone significant change in the period 1981-2001. Most notable is the decline in the importance of the manufacturing sector, from 22.0% of the workforce in 1981, to 12.7% in 2001. While some of this is a result of declining employment in that industry sector, it also reflects the growth in other industry sectors. For example, property and business services now employ 7.3% of Warrnambool’s workforce. The larger proportion of persons employed in property and business services reflects a greater diversity in the Warrnambool labour market compared with other parts of the Study Area. Being a larger city, the employment market is dynamic enough to sustain a wider range of the more specialist type jobs that are classified in the property and business services sector.

Figure 59: Employment by Industry, Warrnambool (a) 1981-2001

(a) Note that the figures for Warrnambool expressed here refer to the area defined by the Department of Sustainability and Environment as the Warrnambool urban area in their publication Towns in Time, and not the ABS definition of the Warrnambool UCL.

As with other parts of the Study Area, the composition of the employment market in Warrnambool has undergone significant change in the period 1981-2001. Most notable is the decline in the importance of the manufacturing sector, from 20.8% of the workforce in 1981, to 12.9% in 2001. While some of this is a result of declining employment in that industry sector, it also reflects the growth in other industry sectors. For example, property and business services now employ 7.0% of Warrnambool’s workforce, up from 2.7% in 1981. The larger proportion of persons employed in property and business services reflects a greater diversity in the Warrnambool labour market compared with other parts of the Study Area. Being a larger city, the employment market is dynamic enough to sustain a wider range of the more specialist type jobs that are classified in the property and business services sector.
4.11 Labour Force and an Ageing Population

It could be expected that an increasing proportion of persons aged 60 years and over would be associated with a declining number of persons in the labour force, as the supply of persons would theoretically decrease. A simple way to test this is to examine the correlation between the change in the proportion of persons aged over 60 years, and the change in the number of persons in the labour force. This reveals a correlation of 0.4203, suggesting that there is not a strong link between these two variables (see Table D: Labour Force and Population Aged 60 Years and Over, 1981-2001 in the Appendices).

However, in about half the towns there was a link between a declining labour force and an ageing population, and these tended to be those which were slow growing, or had declining populations. Examples are the small localities of Balmoral and Lake Bolac, which, respectively, recorded an increase in the population aged 60 years or more of 64% and 72%, and a decline in the labour force of 14% and 8%.

Growing townships tended to record increases in both the number of persons aged over 60, as well as increases in the size of the labour force. Port Campbell is an extreme example of this trend, with an increase of 126% in the number of persons aged 60 years or more, and a 134% increase in the size of the labour force.

There were several towns in which there was a very strong negative correlation between the proportion of persons aged 60 years and over, and the number of people in the labour force. These towns included Willaura, Allansford, Noorat, Penshurst, Beaufort, Ararat, Skipton, Coleraine and Lismore. Except in the cases of Allansford and Noorat, this meant that as the proportion of persons aged 60 years and over increased over the period 1981-2001, the number of persons in the labour force decreased. The towns of Beaufort and Skipton present an extreme example of this trend. The proportion of persons aged 60 years or more increased by over 13% in both towns over the 20-year period, while at the same time the size of their labour force decreased by more than 20%.

Warrnambool and Port Fairy, two of the larger coastal settlements, recorded a strong positive relationship between ageing and the size of the labour force. Both towns recorded a modest percentage point increase in the proportion of persons aged 60 years or more, yet the size of their labour force increased by over 40%.

4.12 Labour Force Information from the 2001 Census

This section looks at the industry of employment by the amount of hours worked. Part-time work is generally considered to be 35 hours or more of paid labour per week.

For all employed persons, there was only a marginal difference in the proportion working part-time in the Study Area (32.5%) and Victoria as a whole (31.9%). However, there were differences between industries, as the next graph shows.
The industries with the highest proportion of part-time employees in the Study Area, as well as Victoria as a whole, were Accommodation, Cafés and Restaurants (56.5%), Health and Community Services (53.9%) and Retail Trade (46.5%).

In terms of differences between the Study Area and Victoria as a whole, the largest were Finance and Insurance (38.3% in Study Area, 24.1% in Victoria), Government Administration and Defence (37.0%, 26.3%) and Property and Business Services (36.8%, 28.9%). Of the industries under examination, only Agriculture had a lower proportion of part-time workers compared to the Victorian figure (20.0%, 24.7%).

At the more detailed industry level (2-digit ANZSIC) Food Retailing (60%), Community Services (58.3%) and Health Services (51.7%) all had high levels of part-time employment in the Study Area compared to Victoria as a whole.

Overall, these figures seem to reflect Warrnambool’s role as a large service area for the south western corner of Victoria, e.g. with a lower proportion in Agriculture, and a higher proportion in Property and Business Services.

4.12.1 The Part-Time and the Very Part-Time

One of the advantages of the Census is that data on hours worked is collected in single units, allowing a more detailed examination of hours worked and therefore a better indication of the nature of employment. The 0-20 hours group are termed “very part-time”, and the 21-34 hours group are “part-time”.

Again, the differences in these proportions between the Study Area, and Victoria, are marginal, as shown below.
The main differences were intra-regional – there was a lower proportion of full-time employees in Warrnambool, and a slightly higher proportion in Corangamite.

Warrnambool had the highest proportion of very part-time workers, at 23.7%, compared to the Study Area average of 20.9%. This may be a reflection of the slightly different industry structure of the Warrnambool labour market. A higher number of university students also provides a labour force more suited to part-time work.

The industries with higher proportions of very part-time workers were Accommodation, Cafés and Restaurants (42.2%) and Retail Trade (34.2%). While the proportions working very part-time and part-time hours in retail trade were quite stable across the Study Area, this was not the case in Accommodation, Cafés and Restaurants. Almost three quarters of employed persons in this industry worked part-time in Pyrenees South, and half were very part-time. (For more detail on hours worked in the retail trade and hospitality industry, see Figures H and I in the Appendices.)

4.12.2 Types of Occupations

Another way to examine aspects of the labour market is to look at the types of occupations that people are employed in, particularly by industry. This provides a better indication as to the nature of employment in each industry.

4.12.3 Agriculture, Forestry and Fishing

Employment in Agriculture, Forestry and Fishing is dominated by managers and administrators. Typically, these are farmers managing their own holdings. The pattern is
similar across the Study Area, which is also similar to the average for Victoria. Only Warrnambool differs slightly, with just over one third of occupations being managers and administrators, and a higher proportion of labourers and related workers.

**Figure 62: Types of Occupations in Agricultural Industries 2001**

4.12.4 Manufacturing

The composition of occupations in Manufacturing is very different. Here managers and administrators comprise approximately one in ten jobs, while traditional ‘blue collar’ jobs such as tradespersons, labourers and intermediate production and transport workers are more predominant. The pattern is similar across the Study Area with the only notable exception being a higher proportion of tradespersons in the manufacturing industry in Southern Grampians Shire.

**Figure 63: Types of Occupations in Manufacturing Industries 2001**
4.12.5 Retail Trade

A significant proportion of employment in the retail trade industry is in low skilled occupations, principally elementary clerical, sales and service workers. This category accounts for around 40% of jobs in retail trade (and over half in Pyrenees–South).

Figure 64: Types of Occupation in Retail Industries 2001
4.12.6 Health and Community Services

Almost half of people employed in Health and Community Services are in professional occupations, with another 10-15% in associate professional occupations. This is not surprising given the skilled nature of many occupations in this industry. About one third of persons are in intermediate clerical, sales and service worker occupations, which are primarily administrative support type positions.
4.12.7 The Working Population

So far, the discussion has focussed on the resident population of the Study Area and their labour market characteristics. However, not everyone works in the same locality where they reside. A simple method of examining the capacity of a local area to employ its residents involves comparing the working population, i.e. those who work in a location, to the number of employed persons usually resident there. This data is presented below, but a number of points need to be considered in its interpretation. These include:

- The Census measures a point in time and cannot capture seasonal employment in the summer months, such as in the tourism industry
- Although the Census form includes a question on the geographic location of employment, it is susceptible to respondent error such as incomplete, or omission, of this information. This means that not all employment locations can be geographically coded, though the number is quite small as some attempts are made to ‘repair’ these responses during processing.
- Persons with no fixed place of employment are not included in this analysis.
Table 10: Number of Employed Persons Employed in, and Usually Resident in the Study Area 2001

<table>
<thead>
<tr>
<th></th>
<th>Working population</th>
<th>Usually resident</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ararat</td>
<td>4,253</td>
<td>4,520</td>
<td>-267</td>
</tr>
<tr>
<td>Corangamite</td>
<td>7,154</td>
<td>7,518</td>
<td>-364</td>
</tr>
<tr>
<td>Glenelg</td>
<td>7,604</td>
<td>8,296</td>
<td>-692</td>
</tr>
<tr>
<td>Moyne</td>
<td>5,047</td>
<td>7,067</td>
<td>-2,020</td>
</tr>
<tr>
<td>Pyrenees–South</td>
<td>851</td>
<td>1,159</td>
<td>-308</td>
</tr>
<tr>
<td>Southern Grampians</td>
<td>7,053</td>
<td>7,187</td>
<td>-134</td>
</tr>
<tr>
<td>Warrnambool</td>
<td>12,855</td>
<td>12,306</td>
<td>549</td>
</tr>
<tr>
<td>Total</td>
<td>44,817</td>
<td>48,053</td>
<td>n/a</td>
</tr>
</tbody>
</table>

The data indicates that for the majority of LGAs, there are more employed persons resident in those areas than are working there. Only Warrnambool had a net inflow of employed persons, perhaps reflecting its role as a regional administrative centre with a more diverse economic base. At the other end of the scale, Moyne recorded a very large outflow of over 2,000 people, or approximately 40% of its employment base. While part of this reflects its geographic location next to Warrnambool, it does indicate that there are far more employed persons usually resident in the Shire than are actually employed there.
5. Future Areas of Employment Growth

Predictions about the future are never likely to be completely accurate, however there are some factors that can be considered relatively certain. Such items are, for example, the prediction that the local population will continue to age.

The ageing of the population inevitably will mean that a growing proportion of the population in this area will be living in retirement homes or will be requiring on-going care and support in their own homes. This should be seen as something positive in terms of generating on-going employment opportunities in the housing construction and health care sectors, as well as in transport, education and the hospitality sectors.

For western Victoria, mineral sands production, blue gum plantations and wind energy power stations are also now seen as offering valuable new opportunities.

5.1 Major Industrial Projects – Iluka

The establishment of the mineral reprocessing plant by Iluka Resources has brought renewed optimism to the area. By the middle of 2005 it is expected that a total of 73 people will be employed by Iluka. Many of these jobs will be located at the Mineral Springs Separation Plant in Hamilton. In addition, there will be a further 80 people working for contractors by the end of the year.

5.2 Tourism, Retailing and Community Services

The role of Hamilton as both a service centre for the local community and an attraction for a growing number of tourists could be enhanced by further investment in, and revitalisation of its commercial and retailing core. The central area of the town is probably due for some refurbishment and perhaps urban design treatments to give it a better sense of cohesion. A program of town centre revitalisation could lead to an increase in visitor numbers and opportunities for new local businesses.

Compared to many towns of its size, Hamilton offers comparatively few cafés, gourmet food outlets and restaurants. Such places appeal not only to tourists but may also be a factor in attracting people considering moving into the town for lifestyle or other reasons. The retail and tourism trades are significant employers of part-time and casual labour offering opportunities for jobs that may be particularly suitable for young people. This could be a factor in retaining young people in the area or even attracting them into Hamilton.

5.3 Indigenous Community Initiatives

The local Gunditjmara community aims to develop the Lake Condah/Terendarra area as a major national heritage park. The community created the Lake Condah Sustainable Development Project in 2002 as a hub for sustainable development for southwest Victoria. Through this project the Gunditjmara community hopes that the area can become a major centre for sustainable agricultural practice and tourism, focusing particularly on history,
heritage, environment, ecotourism and learning (Lake Condah Sustainable Development Project 2004). The project has established an office and employed a manager through grants received from the Glenelg Hopkins Water Catchment Authority, the Alcoa Foundation and the Indigenous Land Corporation. One of the aims of the project is to develop employment and enterprise activities focused on tourism, accommodation, aquaculture, bush tucker, and supporting industries.

In 2004, the Gunditjmara community were successful in their bid to obtain National Heritage Listing for various sites of cultural heritage significance in the vicinity of Lake Condah. Areas listed include Mt Eccles National Park, the Lake Condah Aboriginal Mission, and three former pastoral properties now owned by the community, including the Tyrendarra Indigenous Protected Area. Negotiations are currently underway over plans to re-flood Lake Condah in order to restore the lake’s wetland ecology and revive a pre-contact aquaculture tradition based on eel farming.
6. The Challenges Ahead

Our report has outlined what is happening in the Hamilton region, based on a very detailed evaluation of a number of statistical sources relating to housing, population and the labour market. There are some real challenges ahead, not least the ageing of the population, the continuing decline of some of the smaller settlements, the movement of young people out of the area and some serious local skill shortages.

There are also emerging opportunities. Relatively low house prices, for example, have the potential to attract people seeking a more relaxed lifestyle away from metropolitan centres. But that will only happen if there is the perception that towns like Hamilton also have good healthcare and educational facilities, as well as excellent internet access and a good range of retail outlets, and cafés and restaurants. In addition, it appears as though the Iluka project has the potential to ‘kick start’ a significant increase in population and skills that could, in turn, have positive spin-offs for many economic sectors in the region.
7. References


8. Data sources

Most of the data in the report is sourced from the Census of Population and Housing, which, since 1961, has been held every five years. The most recent Census was conducted in 2001. Census statistics provide a wealth of household and personal information at a number of geographical scales, the smallest of which is the Census Collection District (CD). For many variables, the Census is the only source of reliable data.

Basic demographic and labour force data was sourced from *Towns in Time*, a publication produced by the Department of Sustainability and Environment, essentially repackaging Census data for the purpose of time series analysis. The methodology employed to produce that publication makes allowances for changes in geographic boundaries over time (about 10% of CDs change boundaries between Censuses). However, not all variables could be obtained from this publication, hence for some very small towns, raw Census data was substituted. The impact on the trends exhibited in this report however, is estimated to be very small.

Over time, the classifications used for industry and occupation have changed considerably. These are reviewed and updated periodically to ensure that the data is representative of the labour market. For instance, some occupations have become less important over time, while others have emerged as technological improvements create new types of jobs. Between 1996 and 2001, the Australian Standard Classification of Occupations (ASCO) changed significantly. Concordances are available so that comparisons can be made between the classifications. At the broadest level, their least impact was for professionals, tradespersons and related workers, and intermediate clerical, sales and service workers. At least 90% of the responses could be directly compared between the two editions of the ASCO. Clerical and associated professional occupations were greatly impacted by the change, with a significant proportion of responses not directly comparable. The *Towns in Time* publication also makes allowances for changes in the classifications over time.

There are two types of population counts obtained through the Census. The first is the enumerated population, which is based on where people are counted on Census night, and the second is the place of usual residence, where is where people usually reside. Not everyone is at home on Census night, hence the distinction required between the two counts. Enumeration counts can provide a misleading indicator of population size in holiday regions, which, in Victoria, is most apparent in the snowfields. However, overall, the overwhelmingly majority of persons are counted in the SLA in which they usually reside.

Enumeration counts are used in this report primarily because of the time series data relating to the UCLs. Before 2001, usual residence was only coded down to the SLA level, hence usual residence counts were not available for UCLs. The exception in this report is the data relating to internal migration, which is based on usual residence.

Another aspect of Census data that needs to be considered is the impact of the self-enumeration method of collection. Self-enumeration means that individuals complete their own Census forms, as opposed to being conducted via interviews or obtained as administrative by-product. Self-enumeration tends to increase the possibility that questions will be misinterpreted, or missed altogether. In terms of data, this is evident in the number of responses coded as ‘inadequately described’ or ‘not stated’. How to treat these responses
in terms of analysis is a matter of conjecture, but in this report they have been included in the population counts, as for most Census variables they comprise only a small percentage of total responses.

Other data sources include:

*Small Area Labour Markets*, produced quarterly by the Department of Workplace Relations. This publication provides basic labour market statistics for SLAs. It is the only source of regular labour market data at this geographic level. It was used primarily to provide an indication of labour market performance in the Study Area since 2001.

Data on property sales and rental figures were used to provide an indicator of housing market performance. Annual property sales figures (house sales) were sourced from the Valuer General’s publication *A Guide to Property Values*, which provides data for LGAs. Unfortunately there was no data available for sales of agricultural land. The Office of Housing produces data on rent prices on a quarterly basis, again by LGA.

Population projections were sourced from the Department of Sustainability and Environment, who produce small area estimates (SLA) for Victoria. The figures used are based on 2001 Census results and projected forward using a complex formula which takes into account some regional demographic variations. Despite this, applying a formula and projecting it forward can produce a result that appears to be very linear when graphed. However, past trends have shown that population growth is not steady over time. The projections should be viewed as the outcome of a number of assumptions and are not demographic targets. A myriad of factors influence the rate of population growth and these change over time.
9. Appendices

9.1 Tables

Table A: Persons Not Resident in the Study Area in 1996, Where Did They Come From?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Melbourne Statistical Division</th>
<th>Other Regional Victoria</th>
<th>Interstate</th>
<th>Overseas</th>
<th>Not Stated</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
<td>5-14</td>
<td>592</td>
<td>830</td>
<td>677</td>
<td>163</td>
<td>522</td>
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<td>15-24</td>
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<td>875</td>
<td>532</td>
<td>138</td>
<td>540</td>
<td>2,617</td>
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<tr>
<td>25-34</td>
<td>901</td>
<td>897</td>
<td>779</td>
<td>273</td>
<td>675</td>
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<td>35-44</td>
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<td>622</td>
<td>632</td>
<td>198</td>
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<td>463</td>
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<td>360</td>
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<td>65-74</td>
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<td>122</td>
<td>32</td>
<td>412</td>
<td>953</td>
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<td>75+</td>
<td>106</td>
<td>134</td>
<td>76</td>
<td>7</td>
<td>751</td>
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<td>Total</td>
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<td>4,388</td>
<td>3,460</td>
<td>931</td>
<td>4,264</td>
<td>16,738</td>
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Table B: Median Rent, Three Bedroom Houses in LGAs in the Study Area 2002-2004

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<th></th>
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<tbody>
<tr>
<td>Ararat</td>
<td>$120</td>
<td>$120</td>
<td>$120</td>
<td>$125</td>
<td>$130</td>
<td>$140</td>
<td>$130</td>
<td>$125</td>
<td>$125</td>
<td>4.2%</td>
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<td>Corangamite</td>
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<td>$120</td>
<td>$125</td>
<td>$120</td>
<td>$125</td>
<td>$120</td>
<td>$135</td>
<td>$140</td>
<td>$145</td>
<td>8.7%</td>
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<td>Glenelg</td>
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<td>$140</td>
<td>$145</td>
<td>$150</td>
<td>$158</td>
<td>$140</td>
<td>$150</td>
<td>$160</td>
<td>$165</td>
<td>12.9%</td>
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<td>Moyne</td>
<td>$150</td>
<td>$158</td>
<td>$180</td>
<td>$160</td>
<td>$180</td>
<td>$178</td>
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<td>$165</td>
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<td>$133</td>
<td>$150</td>
<td>$150</td>
<td>$160</td>
<td>$160</td>
<td>$165</td>
<td>$160</td>
<td>10.3%</td>
<td>6.7%</td>
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<td>Warrnambool</td>
<td>$180</td>
<td>$185</td>
<td>$190</td>
<td>$200</td>
<td>$193</td>
<td>$210</td>
<td>$208</td>
<td>$210</td>
<td>$220</td>
<td>7.2%</td>
<td>14.0%</td>
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Source: Department of Human Services, Office of Housing, Rental Report (various issues).
Note: There is no data available for Pyrenees Shire.
<table>
<thead>
<tr>
<th>Type of Centrelink Payment</th>
<th>Ararat</th>
<th>Corangamite</th>
<th>Glenelg</th>
<th>Moyne</th>
<th>Pyrenees</th>
<th>Southern Grampians</th>
<th>Warrnambool</th>
<th>Regional Victoria</th>
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<tr>
<td>Age Pension</td>
<td>1331</td>
<td>1742</td>
<td>2201</td>
<td>1506</td>
<td>771</td>
<td>2051</td>
<td>3202</td>
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<td>Disability Support Pension</td>
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<td>535</td>
<td>730</td>
<td>508</td>
<td>313</td>
<td>598</td>
<td>1129</td>
<td>51036</td>
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<td>Newstart Allowance</td>
<td>344</td>
<td>298</td>
<td>647</td>
<td>319</td>
<td>232</td>
<td>390</td>
<td>826</td>
<td>39188</td>
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<td>Parenting Payment–Single</td>
<td>237</td>
<td>273</td>
<td>440</td>
<td>280</td>
<td>133</td>
<td>283</td>
<td>745</td>
<td>31520</td>
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<td>Youth Allowance</td>
<td>243</td>
<td>248</td>
<td>374</td>
<td>300</td>
<td>149</td>
<td>372</td>
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<td>Other Pensions and Allowances</td>
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<td>504</td>
<td>680</td>
<td>499</td>
<td>331</td>
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<tr>
<td>Total Selected Income Support Recipients (a)</td>
<td>3166</td>
<td>3600</td>
<td>5072</td>
<td>3412</td>
<td>1929</td>
<td>4280</td>
<td>7709</td>
<td>348562</td>
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<table>
<thead>
<tr>
<th>Ratio Centrelink Recipients to Employed Persons (b)</th>
<th>39.4</th>
<th>49.5</th>
<th>65.7</th>
<th>48.9</th>
<th>57.1</th>
<th>58.1</th>
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<tbody>
<tr>
<td>Ratio Centrelink Recipients Excluding Age Pension</td>
<td>19.8</td>
<td>26.5</td>
<td>36.4</td>
<td>24.6</td>
<td>31.6</td>
<td>31.3</td>
</tr>
</tbody>
</table>

Source: Centrelink

(a) Selected income support recipients include a wide variety of payments. The main exclusions are Bereavement Allowance, Childcare Benefit, Farm Family Restart and Family Tax Benefit Parts A and B.

(b) Employed persons at June 2002 – Source is DEWR
<table>
<thead>
<tr>
<th>Urban Centre/Locality</th>
<th>Population 60+ Change</th>
<th>Labour Force Change</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allansford</td>
<td>83</td>
<td>44</td>
<td>-47.0%</td>
</tr>
<tr>
<td>Ararat</td>
<td>1315</td>
<td>1570</td>
<td>19.4%</td>
</tr>
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9.2 Figures

Figure A: Projected Population, Ararat 2003-2031

Figure B: Projected Population, Corangamite 2003-2031
Figure C: Projected Population, Glenelg 2003-2031

Figure D: Projected Population, Moyne 2003-2031
Figure E: Projected Population, Pyrenees South 2003-2031

Figure F: Projected Population, Southern Grampians 2003-2031
Figure G: Projected Population, Warrnambool 2003-2031

Figure H: Hours Worked in the Retail Trade Industry in the Study Area and Victoria 2001
Figure 1: Hours Worked in the Accommodation, Cafes and Restaurants Industry in the Study Area and Victoria 2001

![Bar chart showing the proportion of people working 0-20 hours, 21-34 hours, and 35+ hours in different regions of Victoria.](chart_image)