



**Murrindindi**  
Shire Council

# **Murrindindi Snapshot**

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**October 2023**



# Murrindindi Snapshot

Murrindindi Shire is home to around 15,300 residents who are dispersed across the townships of the Kinglake Ranges, Alexandra and Yea, through the villages of Marysville and Eildon as well as dotted around the many small townships and rural areas. The region is renowned for its lush green landscapes and rolling hills, secluded waterfalls and secluded waterfalls, tracks and trails. Key natural attractions include Lake Mountain Alpine Resort, Cathedral Range State Park, Kinglake and Lake Eildon National Parks.

We are a thriving and connected community with approximately 1760 businesses serving the area, with that number set to expand as the population and investment in the area grow.



Murrindindi Shire Council is proud to acknowledge the Taungurung and Wurundjeri people as the traditional owners of the land we now call Murrindindi Shire.

We pay our respects to First Nations leaders and elders, past, present and emerging, who are the keepers of history, traditions, knowledge and culture of this land. We commit to working in collaboration with traditional owners of this land in a spirit of reconciliation and partnership.

*IMAGE CREDITS: Cover; @iampeacecreative P3 top; @thuan.truong838, P3 bottom; @lovedayandsonphotography, P4 top; @danielbadelita, P4 middle; @thebambyleabrood, P4 bottom; @trangcessnguyen, P6 @spencer.cameron, P13; @travelling.tam, P15; @the\_dayz\_away*

# Population

We have an aging population, with a significant portion aged between 50 and 75, while the younger age group (20-39) when compared to Victorian State average is underrepresented, likely due to outward migration for study or work.

The impact to our economy on our aging population means a reduced amount of the population in the highly productive age cohort of 20 – 39. As the population ages and transitions into retirement or reduction in working hours this will further impact the economy.

	Murrindindi (2021)		Victoria (2021)	Difference
Age	Persons	%	%	%
0-4 years	651	4.28%	5.78%	-1.50%
5-9 years	719	4.73%	6.18%	-1.45%
10-14 years	835	5.49%	6.02%	-0.53%
15-19 years	783	5.15%	5.58%	-0.43%
20-24 years	599	3.94%	6.31%	-2.37%
25-29 years	601	3.95%	7.31%	-3.36%
30-34 years	690	4.54%	7.69%	-3.15%
35-39 years	762	5.01%	7.53%	-2.52%
40-44 years	813	5.35%	6.59%	-1.24%
45-49 years	1,003	6.60%	6.40%	0.20%
50-54 years	1,142	7.51%	6.31%	1.20%
55-59 years	1,240	8.16%	5.90%	2.26%
60-64 years	1,405	9.25%	5.58%	3.67%
65-69 years	1,284	8.45%	4.93%	3.52%
70-74 years	1,122	7.38%	4.38%	3.00%
75-79 years	783	5.15%	3.12%	2.03%
80-84 years	420	2.76%	2.18%	0.58%
85-89 years	217	1.43%	1.32%	0.11%
90-94 years	95	0.63%	0.66%	-0.03%
95-99 years	30	0.20%	0.18%	0.02%
100 years and over	3	0.02%	0.02%	0.00%
Total	15,197	100.00%	100.00%	0.00%







## Fertility

Despite a slightly higher fertility rate (1.79) than the Victorian average (1.63), over time, our aging population may lead to a decline in this rate.

Life expectancy (years) at birth for males (80.27) is lower than the state average (81.9), but for females (85.82), it's slightly higher than the state average (85.55).

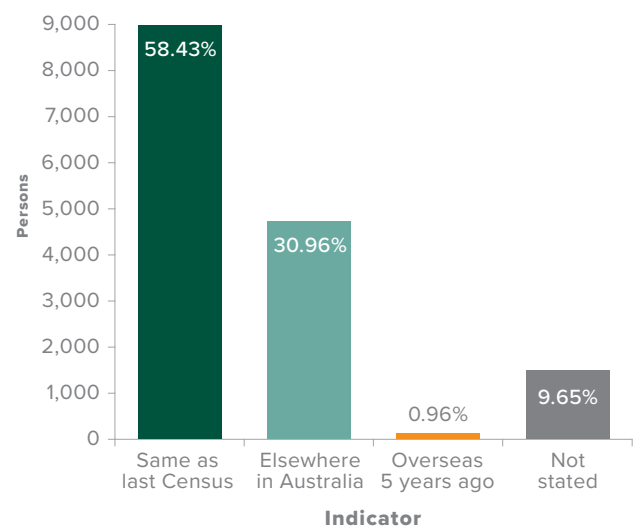
## Stability

Our population has remained relatively stable, with 58.43% staying within the Shire, while 30.96% have moved elsewhere in Australia, 0.96% moved overseas and 9.65% did not specify their location in the last Census.

### Indicator

Indicator	Murrindindi (2021)	
	Persons	%
Same as last Census	8,499	58.43%
Elsewhere in Australia	4,504	30.96%
Overseas 5 years ago	139	0.96%
Not stated	1,404	9.65%
Total	14,546	100.00%
Additional cohorts not included in totals		
Not applicable	651	

### Indicator - Murrindindi (2021)



## Education

Education is a fundamental driver of economic development as it not only enhances individual opportunities but also strengthens the collective capacity of a society to innovate, compete, and achieve sustainable economic growth. Consequently, investing in education is considered a wise strategy for long-term economic prosperity and development.

The level of tertiary (or non-school) education across our population shows a higher percentage have certificate level (39.45%) compared to Victoria (26.15%). Whereas the Victorian average for bachelor's degree level (29.60%) is higher than ours (16.81%). Similarly, our level of postgraduate degree level is lower for Murrindindi Shire (4.33%) compared with Victoria (11.79%).

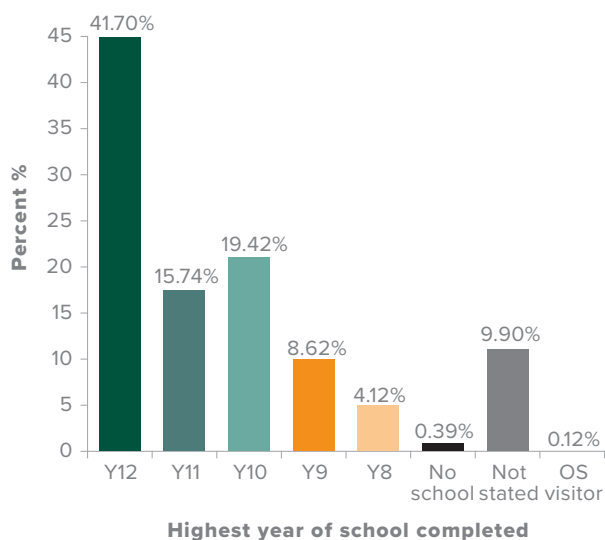
### Highest year of school completed

Highest Year of School Completed	Murrindindi		Victoria
	Persons	%	%
Year 12 or equivalent	5,392	41.70%	59.49%
Year 11 or equivalent	2,035	15.74%	10.88%
Year 10 or equivalent	2,511	19.42%	12.25%
Year 9 or equivalent	1,115	8.62%	5.30%
Year 8 or below	533	4.12%	4.65%
Did not go to school	51	0.39%	1.27%
No stated	1,280	9.90%	5.93%
Overseas visitor	15	0.12%	0.24%
Total	12,932	100.00%	100.00%
Additional cohorts not included in totals			
Not applicable	2,260		

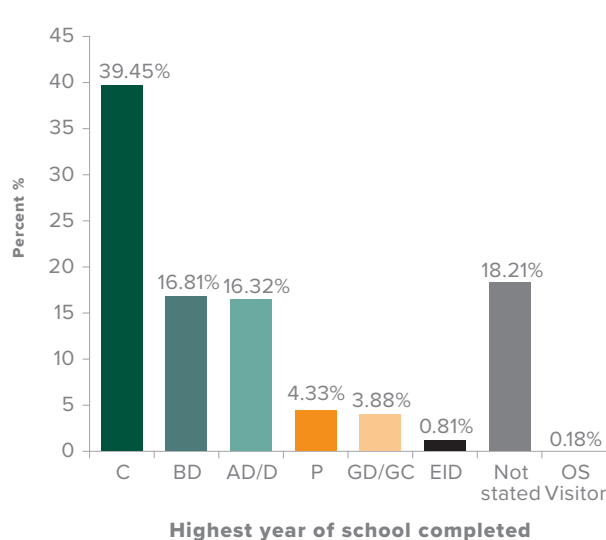
### Tertiary (or non-school) education

Level	Murrindindi		Victoria
	Persons	%	%
Certificate	3,210	39.45%	29.60%
Bachelor Degree	1,368	16.81%	26.15%
Advanced Diploma and Diploma	1,328	16.32%	15.33%
Postgraduate Degree	352	4.33%	11.79%
Graduate Diploma and Graduate Certificate	316	3.88%	4.51%
Level of education inadequately described	66	0.81%	0.94%
Level of education not stated	1,482	18.21%	11.30%
Overseas visitor	15	0.18%	0.38%
Total	8,137	100.00%	100.00%

### Highest year of school completed - Murrindindi (2021)



### Highest tertiary level completed - Murrindindi (2021)





# Gross Regional Product

Gross Regional Product (GRP) is the total value of final goods and services produced in the region over the period of one year. This includes goods and services bought and sold within Murrindindi Shire and from outside the Shire.

Our GRP is \$785.949 million. While our GRP has grown over the last 10 years, there have been significant dips. This is largely due to a reliance on goods and services from outside Murrindindi Shire, which is currently at \$1 billion. This equates to 83% of our gross regional expenses, compared to 71% for the Hume Region.



**Nominal GRP / Real GRP (June 2021 Prices)**



## Regional Export Industries

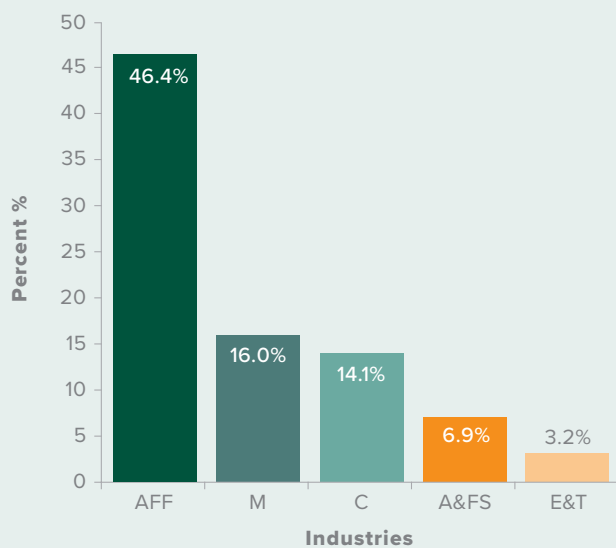
Exporting benefits our economy by increasing economic activity through a range of activities including job creation, diversification, improved productivity, investment attraction, and improved amenity.

However, successful exporting requires careful planning, adaptation to international markets, and consideration of external factors, making it essential for businesses and regions to pursue export opportunities strategically and sustainably.

### Our top five regional export industries are:

- Agriculture, Forestry and Fishing
- Manufacturing
- Construction
- Accommodation and Food Services
- Education and Training

### Top five regional export industries



## Regional Imports

Regional imports, goods and services brought in from outside our region, impact our GRP. If these can be reduced and sourced within our economy it will benefit the local economy and improve our regional export and GRP.

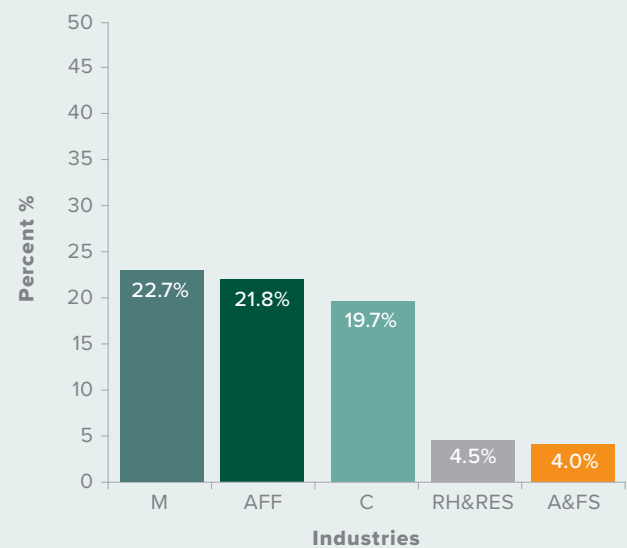
There is an opportunity to decrease imports through activities like circular economy and investment in key supportive industries.

### Our top five regional import industries are:

- Manufacturing
- Agriculture, Forestry and Fishing
- Construction
- Rental, Hiring and Real Estate Services\*
- Accommodation and Food Services.

\* majority (2.8%) is ownership of residential property by non-residential ratepayers

### Top five regional import industries



# Business

The majority (98.21%) of local businesses are small to medium enterprises, employing less than 20, with the majority (63.84%) of these being non-employing sole traders. The number of businesses in the Shire has grown over the last two years by over 8% to a total of 1897.

The majority (69.05%) of businesses turnover between \$50k and \$2m annually. There has been an increase in the number of businesses with a turnover over \$2m, from 64 at June 2020 to 91 at June 2022.

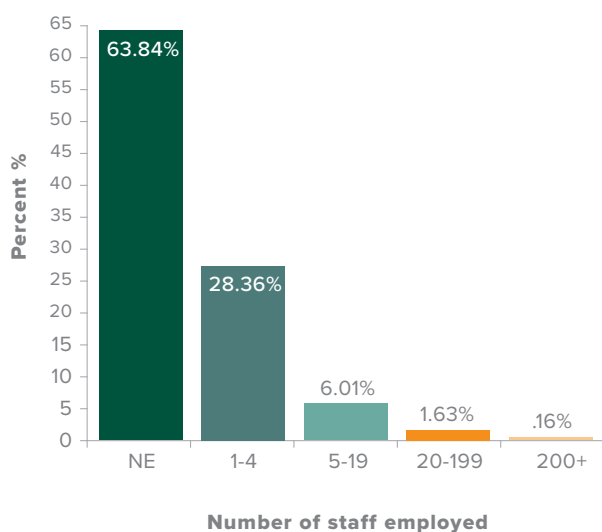
## Staff Size

Staff Size		Murrindindi			
		Jun-20	Jun-21	Jun-22	Jun-22 %
●	Non employing	1,183	1,134	1,211	63.84%
●	1-4	435	513	538	28.36%
●	5-19	107	112	114	6.01%
●	20-199	17	26	31	1.63%
●	200+	3	4	3	0.16%
	Total	1,745	1,789	1,897	100.00%

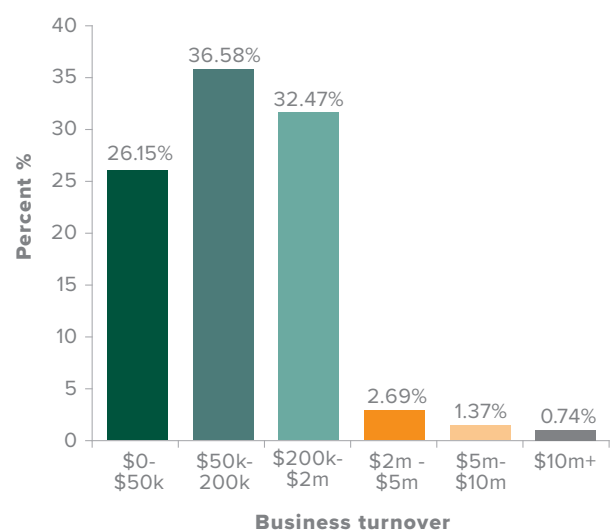
## Turnover

Turnover		Murrindindi			
		Jun-20	Jun-21	Jun-22	Jun-22 %
●	Zero to less than \$50k	511	497	496	26.15%
●	\$50k to less than \$200k	679	709	694	36.58%
●	\$200k to less than \$2m	491	516	616	32.47%
●	\$2m to less than \$5m	39	37	51	2.69%
●	\$5m to less than \$10m	13	19	26	1.37%
●	\$10m or more	12	11	14	0.74%
	Total	1,745	1,789	1,897	

## Staff Size - Murrindindi (2020-2022)



## Turnover - Murrindindi (2020-2022)



<sup>1</sup>ABS Counts of Australian Businesses (June 2022)



## Industry Sector

Our businesses cover a wide range of industries. Construction and Agriculture, Forestry & Fishing have the highest number of businesses with a combined 47.87% of all businesses.

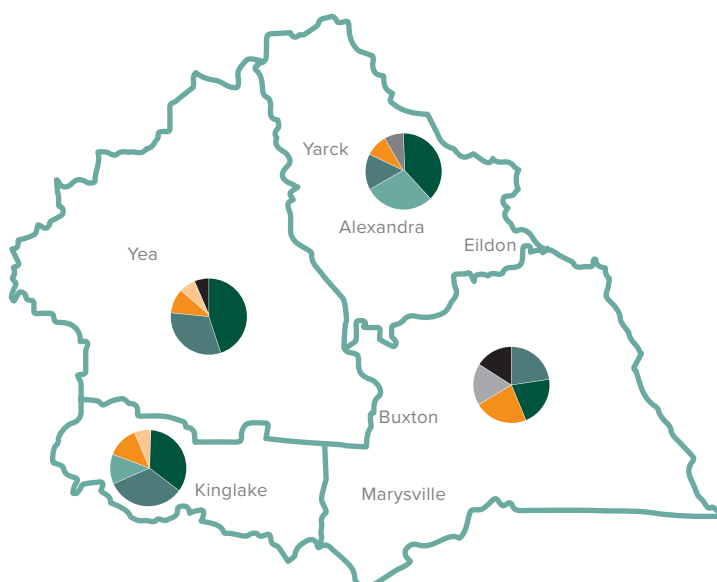
### Industry Sector

Industry Sector	Businesses Count	%
Construction	456	24.04%
Agriculture, Forestry & Fishing	452	23.83%
Professional, Scientific & Technical Services	153	8.07%
Retail Trade	117	6.17%
Accommodation & Food Services	113	5.96%
Rental, Hiring & Real Estate Services	97	5.11%
Transport, Postal & Warehousing	84	4.43%
Manufacturing	79	4.16%
Other Services	65	3.43%
Wholesale Trade	58	3.06%
Administrative & Support Services	58	3.06%
Health Care & Social Assistance	46	2.42%
Financial & Insurance Services	35	1.85%
Arts & Recreation Services	27	1.42%
Education & Training	19	1.00%
Information Media & Telecommunications	17	0.90%
Electricity, Gas, Water & Waste Services	8	0.42%
Public Administration & Safety	8	0.42%
Mining	n	n
Other	n	n
Total	1,897	100.00%

## Industry Grouping Share

Our industries are not spread evenly across our region. With clusters found across four main districts. Large cluster of manufacturing businesses are focused within Alexandra and district as well as Kinglake. Construction, Agriculture, Forestry and Fishing as well as Rental, Hiring and Real Estate Services are spread across the Shire. Electricity, Gas, Water and Waste Services are concentrated within Alexandra and district.

Opportunities for improved collaboration within existing clusters could be beneficial to the wider economy.



### Legend

- Agriculture, forestry & Fishing
- Construction
- Manufacturing
- Rental, Hiring & Real Estate Services
- Financial & Insurance Services
- Education & Training
- Electricity, Gas, Water & Waste Services
- Accommodation & Food Services

Note: graphs represent size of industry within the statistical area within Murrindindi Shire.

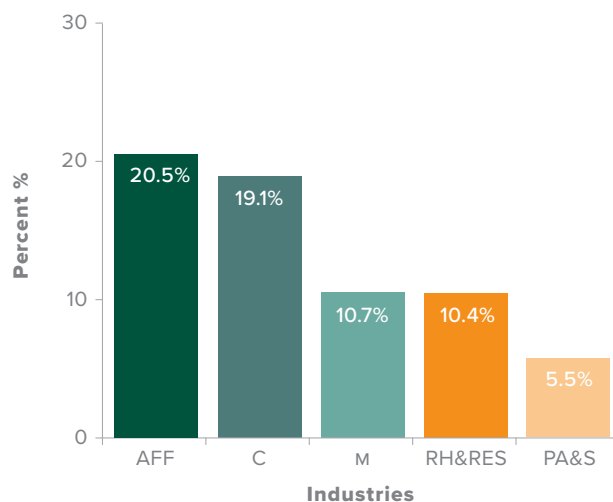
## Industry Output

Output is the gross revenue generated by businesses and organisations. This is also referred to as total sales or total revenue. The total output generated for our region is over \$1.5 billion.

### Our top five performing industries by output are:

- Agriculture, Forestry & Fishing
- Construction
- Manufacturing
- Rental, Hiring & Real Estate Services
- Public Administration and Safety

### Top five performing industries by output



## Key Propulsive Sectors

Key propulsive sectors are those industries which are key drivers of our economy. They are determined in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages). Our top five industry sectors are listed in the table below.

### Key propulsive sectors

Industry Sectors	Backward Linkages	Exports	Employment	Value-Added	Total
Agriculture, Forestry & Fishing	✓	✓	✓	✓	4
Construction	✓	✓	✓	✓	4
Accommodation & Food Services		✓	✓		2
Education & Training		✓	✓	✓	3
Health Care & Social Assistance			✓	✓	2

<sup>2</sup> Remplan Industry Employment Data (2023)



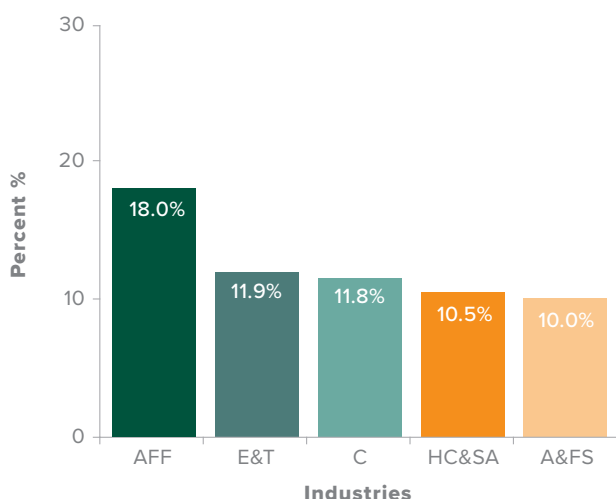
## Employment

Local businesses employ over 5,000 people with the majority (73.2%) living and working in the Shire. Of the 26.8% of our workforce does work outside the region (or Local Government Area (LGA)), most are in neighbouring regions (or LGAs). The top three are Shire of Yarra Ranges (6.0%), City of Whittlesea (4.3%) and Mitchell Shire (2.8%)

### The top five employment industries are:

- Agriculture Forestry and Fishing
- Education & Training
- Construction
- Health Care and Social Assistance
- Accommodation and Food Services

### Top five employment industries



Change in employment has mostly been positive for the top five industries, see comparison between 2016 and 2021 Census in the table below.

Only Wholesale Trade and Information Media and Telecommunications had reduction in number of jobs.

### 2016 / 2021 Change in employment status

Industry Sector	2021	2016	Variance
Agriculture, Forestry & Fishing	900	731	169
Education & Training	595	534	61
Construction	589	411	178
Health Care & Social Assistance	524	420	104
Accommodation & Food Services	499	467	32
Retail Trade	405	357	48
Public Administration & Safety	314	274	40
Manufacturing	223	207	16
Other Services	177	109	68
Professional, Scientific & Technical Services	160	155	5
Administrative & Support Services	153	146	7
Transport, Postal & Warehousing	131	125	6
Arts & Recreation Services	84	61	23
Wholesale Trade	82	111	-29
Rental, Hiring & Real Estate Services	58	53	5
Financial & Insurance Services	56	27	29
Electricity, Gas, Water & Waste Services	24	37	-13
Mining	15	7	8
Information Media & Telecommunications	14	15	-1
Total	5003	4247	756

## Occupation

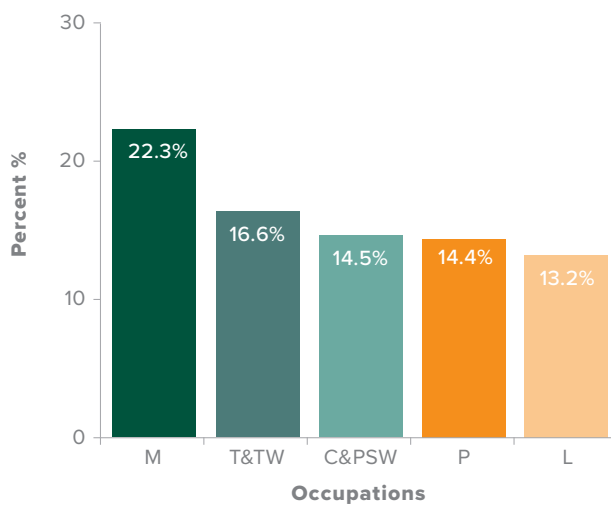
The Census collects data on occupations, the top occupation is Manager (22.3%). The majority (47.8%) of these jobs are within Agriculture, Forestry & Fishing, with Accommodation & Food Services (13.0%) and Retail (6.9%) rounding out the top three.

The second highest occupation Technicians and Trades Workers (16.6%) are mostly in Construction (36.7%), Other Services (13.8% and Manufacturing (12.4%).

### The top five occupations are:

- Managers
- Technicians and Trades Workers
- Community and Personal Service Workers
- Professionals and
- Labourers

### Top five occupations



## Workforce

We have an aging workforce, the majority (53.63%) of workers are over 45, compared to Victoria (39.59%). Our largest cohort is 45 -54 (22.9%) compared to 25-34 (23.8%) for Victoria. We have over 500 people (10.1%) who are still working aged over 65.

## Unemployment

We have traditionally had a relatively low level of unemployment, compared to Victoria's average. Our region maintained a low level of unemployment during the COVID-19 pandemic. The current level of unemployed is at an historic low, which may indicate an undersupply within the workforce.

### Unemployment 2015-2022

Year	Murrindindi	Victoria
	%	%
2015	5.1	6.1
2016	4.5	5.8
2017	4.0	5.9
2018	3.3	5.0
2019	3.1	4.7
2020	3.9	6.4
2021	4.3	5.0
2022	2.9	3.7



# Visitor Economy

The visitor economy, also known as the tourism sector, encompasses all economic activities and industries that are related to attracting, accommodating, and servicing visitors or tourists. This includes a wide range of businesses and services such as hotels, restaurants, transportation, attractions, cultural institutions, event venues, tour operators, and more. The visitor economy generates revenue and employment opportunities by catering to the needs and preferences of travelers, contributing to our local economy.

The visitor market is a vital component of our economy and plays a significant role in promoting cultural exchange, recreation, and leisure activities.



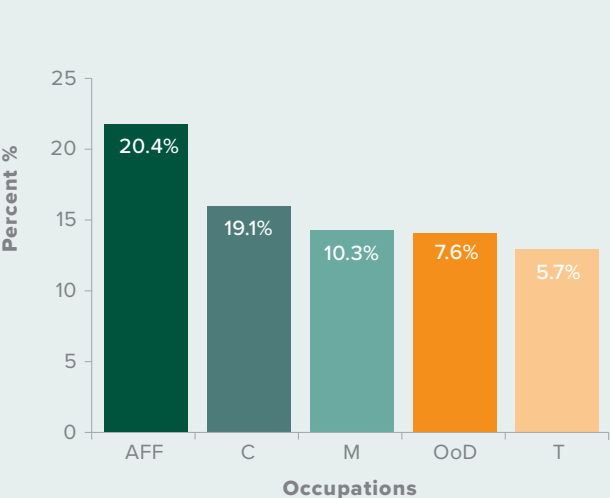
## Tourism output

When the visitor economy is included in our output the top five industries change to the following.

### The top five industries in the visitor economy:

- Agriculture, Forestry and Fishing
- Construction
- Manufacturing
- Ownership of Dwellings and
- Tourism

Top five industries in the visitor economy

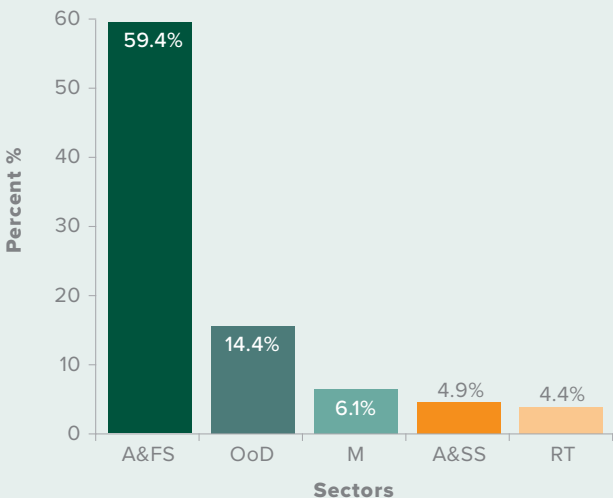


As tourism isn't a defined industry sector it is made up of other industry sectors.

### The top five contributing sectors for tourism output for Murrindindi Shire are:

- Accommodation and Food Services
- Ownership of Dwellings
- Manufacturing
- Administration & Support Services and
- Retail Trade

Top five contributing sectors for tourism output



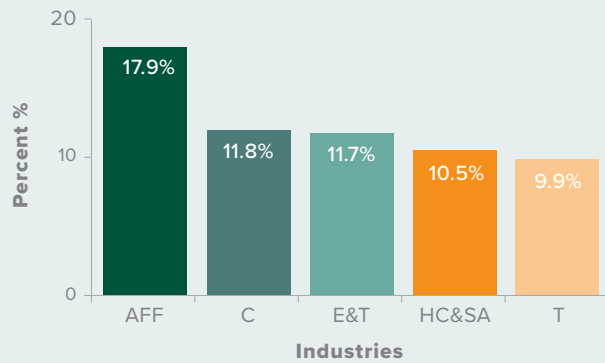
## Tourism jobs

Tourism accounts for 9.9% of all jobs (493) this is higher than the Victorian average of 3.9%. This displays the significant contribution that tourism plays in our economy.

### The top five industries for employment when we include tourism are:

- Agriculture, Forestry and Fishing
- Construction
- Education and Training
- Health Care and Social Assistance
- Tourism

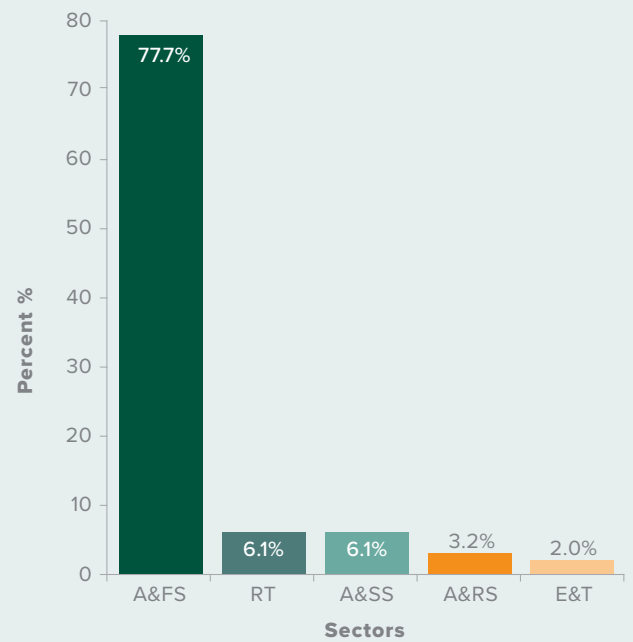
(when including tourism)



### The top five contributing sectors for tourism employment are:

- Accommodation and Food Services
- Retail Trade
- Administrative and Support Services
- Arts and Recreation Services
- Education and Training

Top five contributing sectors for tourism employment





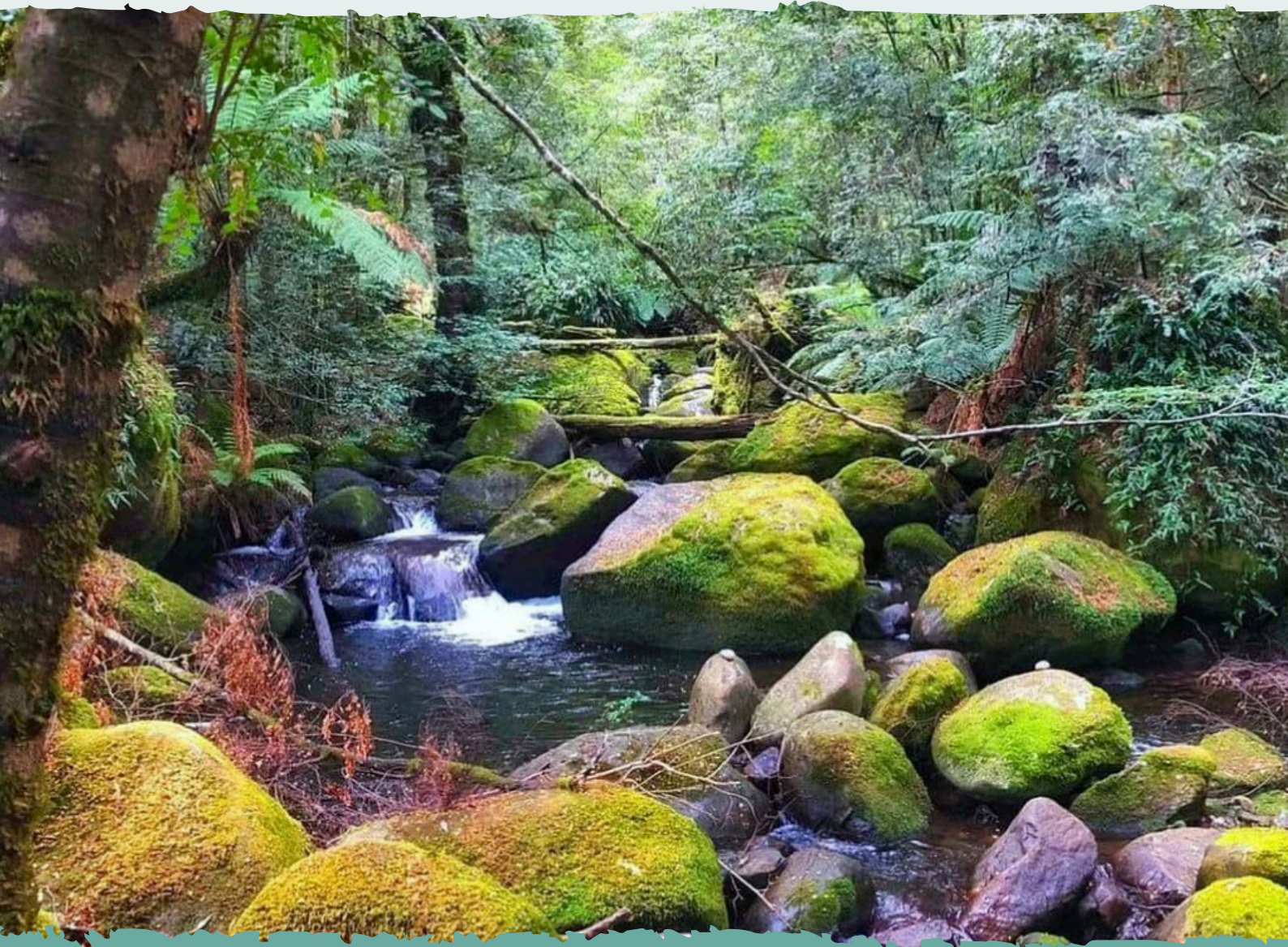
# Visitor Profile

The visitor profile data specific to Murrindindi (S) in 2022:

<p><b>Approx 1.2m<sup>4</sup></b> <b>Visitors to Murrindindi</b> 830,979 (day visitors) 70% 363,470 (overnight visitors) 30% 724 (overseas visitors) 0.1%</p>	<p><b>Domestic Day Trip Visitors</b> <b>\$118</b>, average spend per trip</p>
<p><b>\$2.27B</b> Domestic visitor expenditure in the High Country</p>	<p><b>Domestic Overnight Visitors</b> <b>\$178<sup>3</sup></b>, average spend per night <b>\$356</b>, average spend per trip <b>2 nights</b>, average length of stay</p>

<sup>3</sup> TRA 2022 Murrindindi (S) Local Government Area Tourism Profile

<sup>4</sup> Source: Tourism Research Australia, National Visitor and International Visitor Survey for the 2022 Calendar Year.





**Murrindindi**  
Shire Council

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