



Horsham Rural City
Council urban rural balance



HORSHAM **ECONOMIC DEVELOPMENT STRATEGY** 2017 - 2021

STRATEGY REPORT | FEBRUARY 2018



Urban Enterprise

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CONTENTS

1. INTRODUCTION	2	7.3. CONSIDERATIONS	19
1.1. BACKGROUND	2	7.4. PRIMARY INDUSTRIES: STRATEGIES AND ACTIONS	21
1.2. APPROACH	2	8. THEME 3: A VIBRANT CENTRAL ACTIVITY DISTRICT	24
PART A. ECONOMIC PROFILE	6	8.1. OBJECTIVE	24
2. POLICY AND STRATEGIC CONTEXT	7	8.2. OVERVIEW	24
3. DEMOGRAPHICS	8	8.3. CONSIDERATIONS	25
4. ECONOMIC PROFILE	9	8.4. A VIBRANT CENTRAL ACTIVITY DISTRICT: STRATEGIES AND ACTIONS	27
4.1. OVERVIEW	9	9. THEME 4: PUBLIC SECTOR INDUSTRY	30
4.2. KEY ECONOMIC INDICATORS	9	9.1. OBJECTIVE	30
4.3. INDUSTRY OVERVIEW	10	9.2. OVERVIEW	30
PART B. STRATEGIC FRAMEWORK	11	9.3. CONSIDERATIONS	31
5. ECONOMIC DEVELOPMENT FRAMEWORK	12	9.4. PUBLIC SECTOR INDUSTRY: STRATEGIES AND ACTIONS	32
5.1. VISION	12	10. THEME 5: DESTINATION HORSHAM	34
5.2. KEY THEMES	12	10.1. OBJECTIVE	34
6. THEME 1: BEST PRACTICE IN ECONOMIC DEVELOPMENT	13	10.2. OVERVIEW	34
6.1. OBJECTIVE	13	10.3. CONSIDERATIONS	35
6.2. OVERVIEW	13	10.4. DESTINATION HORSHAM: STRATEGIES AND ACTIONS	38
6.3. CONSIDERATIONS	14	11. THEME 6: ECONOMIC INFRASTRUCTURE	42
6.4. BEST PRACTICE ECONOMIC DEVELOPMENT: STRATEGIES AND ACTIONS	15	11.1. OBJECTIVE	42
7. THEME 2: PRIMARY INDUSTRIES	18	11.2. OVERVIEW	42
7.1. OBJECTIVE	18	11.3. CONSIDERATIONS	43
7.2. OVERVIEW	18	11.4. ECONOMIC INFRASTRUCTURE: STRATEGIES AND ACTIONS	46

ACKNOWLEDGMENTS

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ACRONYMS

ABARES – Australian Bureau of Agricultural and Resource Economics and Sciences

ABS – Australian Bureau of Statistics

ALOS – Average Length of Stay

ANZSIC – Australia New Zealand Standard Industry Classification

CAD – Central Activity District

CRMS – Client Relationship Management System

EDS – Economic Development Strategy

EDU – Economic Development Unit

FTE – Full Time Equivalent

GRP – Gross Regional Product

HRCC – Horsham Rural City Council

IVS – International Visitor Survey

LGA – Local Government Area

LPPF – Local Planning Policy Framework

MSS – Municipal Strategic Statement

NCE – Natimuk Community Energy

NEIS – New Enterprise Incentive Scheme

NVS – National Visitor Survey

PAO – Public Acquisition overlay

RDV – Regional Development Victoria

SEIFA – Socio Economic Index for Areas

SPPF – State Planning Policy Framework

TRA – Tourism Research Australia

TSA – Tourism Satellite Account

UDP – Urban Development Program

VIF – Victoria In Future

WDA – Wimmera Development Association

WIFT – Wimmera Intermodal Freight Terminal

WSMR – Wimmera Southern Mallee Region

GLOSSARY OF TERMS

Domestic day trip visitor - Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitor - People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

International visitor - A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

Short Term – Refers to the indicative timeframe to undertake actions, detailed in the Strategy. 1 to 2 years

Medium Term – Refers to the indicative timeframe to undertake actions, detailed in the Strategy. 2 to 3 years

Long Term – Refers to the indicative timeframe to undertake actions, detailed in the Strategy. 3 to 5 years.

1. INTRODUCTION

1.1. BACKGROUND

The aim of the Horsham Economic Development Strategy is to strengthen, enhance and further diversify the existing economic, tourism and industrial base in Horsham Rural City through a strategic and collaborative approach, which leads to sustainable growth that improves the wealth and wellbeing of the community.

This Strategy has been prepared by Urban Enterprise on behalf of Horsham Rural City Council.

This document is presented in two parts:

Part A Economic Profile: Provides key economic data which highlights the attributes of Horsham's economy and demographic trends.

Part B Future Directions: Provides the framework to guide implementation of the Strategy, including a vision, themes, strategies and actions for economic development over the next five years (2017 to 2021).

Locational and township context plans are provided on pages 4 and 5.

1.2. APPROACH

This Strategy Report was developed following the preparation of a Background Discussion Paper, which underpins and informs future directions identified in this Strategy.

The approach and methodology adopted for the Horsham Rural City Economic Development Strategy is provided in Table 1.

Each year through the life of this strategy an annual action plan will be developed and will include provision for regular monitoring and reporting.



Annually a review of achievements against the actions from the action plan will be undertaken in conjunction with business sentiment, stakeholder and visitor surveys to provide a holistic snapshot. A review of the Economic Development strategy will also take place to ensure changes to other strategies, policies and significant developments are captured.

Collectively the surveys, reviewed strategy and action plan reports will be used to inform the development of the next annual action plan in close consultation with key stakeholders.

TABLE 1 APPROACH AND METHODOLOGY

Strategy and Policy Context	<p>A comprehensive review of existing literature pertaining to Horsham Rural City and the Wimmera Southern Mallee’s economy, which includes existing objectives and strategies for promoting economic growth in the region.</p>
Economic and Demographic Research and Analysis	<p>An assessment of Horsham Rural City and Wimmera Southern Mallee’s economy using key indicators such as Gross Regional Product (GRP), output, regional exports and employment.</p> <p>This stage also includes a profile of Horsham’s resident demographic including historical & future population growth, age profile, level of disadvantage, housing, income and occupation.</p>
The Visitor Economy	<p>Assessment of domestic and international visitation to the Council area including the identification of key visitor markets (travel groups, age profile, length of stay, activities undertaken and visitor origin).</p> <p>This stage provides an overview of the local and regional tourism strengths and identifies certain gaps in tourism product and development.</p>
Consultation	<p>A thorough consultation process included a series of workshops, one-on-one meetings and online surveys to engage stakeholders.</p> <p>Industry representatives, local businesses, referral authorities, Council staff and Councillors, and the community were consulted as part of this project.</p>
Background Discussion Paper	<p>The preparation of a Background Discussion Paper, which includes all background research and analysis identified above.</p>





Horsham Rural City Locational Context

-  Council Boundary
-  Major Highways
-  Wimmera River
-  Nature Based Assets
-  Lakes

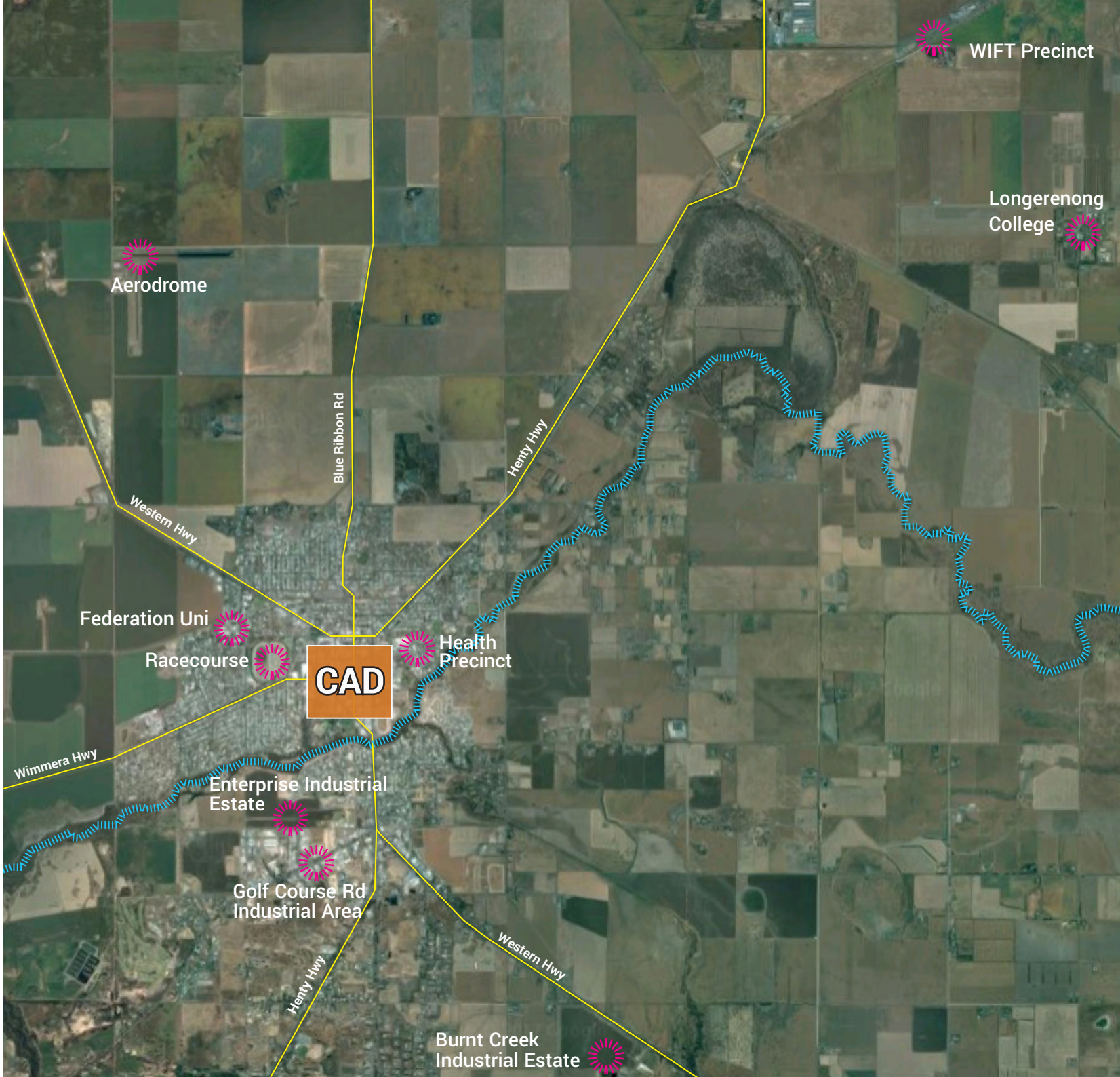
Note: Map is indicative only



Horsham Township Economic Assets

-  Economic Assets
-  Central Activity District
-  Major Highways
-  Wimmera River

Note: Map is indicative only



This section provides an overview of the key trends and issues facing Horsham's economy including:

- » Demographic trends;
- » Horsham's economic role; and
- » Overview of local economic drivers and key industry sectors.

A complete assessment of Horsham's Economic and Demographic Profile is detailed in the Background Discussion Paper



PART A: **ECONOMIC PROFILE**

2. POLICY AND STRATEGIC CONTEXT

The Horsham Rural City Economic Development Strategy builds on existing research, strategy and policy documents. Some of the key documents which have been reviewed to inform the Economic Development Strategy include:

- State Planning Policy Framework;
- Local Planning Policy Framework;
- Wimmera Southern Mallee Regional Growth Plan;
- Wimmera Development Association Strategic Plan 2016 – 2020;
- Regional Development Focus, Regional Development Victoria;
- Wimmera Southern Mallee Mining Sector Plan;
- Horsham Rail Corridor Master Plan;
- Victorian Visitor Economy Strategy;
- Victoria's 2020 Tourism; and
- HRCC Tourism Master Plan.

Based on the review of local and regional strategy and policy, the priority objectives for economic development in Horsham and the broader Wimmera Southern Mallee are focussed around supporting major industry such as Agriculture and Manufacturing, improving liveability, and providing opportunities for all members of the community, fostering growth opportunities in new and emerging industries and attracting business, investment, residents and visitors.

There is also an objective to further diversify the local economy to create greater resilience. Horsham's role as a regional City in the broader Wimmera sees it well-placed to accommodate growth in public service industries such as health and education, as well as industries that develop more organically through an increase in population and activity such as retail, food and accommodation services, entertainment and recreation, construction and professional services.

Drawing on existing policy and strategy, the key strategic economic development opportunities identified for Horsham Rural City include:

- Support Horsham's role as a major service centre for the broader Wimmera region.
- Continue to develop Horsham's Central Activity District (CAD) to create a vibrant hub for residents, workers and visitors.
- Support the community through the provision of infrastructure and services.
- Capitalise on the region's water security provided by the Wimmera-Mallee Pipeline, and facilitate new business and investment opportunities.
- Continue to foster development in the renewable energy sector.
- Support and protect the Agriculture industry and recognise its importance as a key sector in the Wimmera.
- Diversify the Agriculture industry through value-adding, new commodities, specialist services, research and education, innovation and mechanisations, and transport network efficiencies.
- Facilitate and encourage the development of the Mining sector (mineral sands).
- Attract investment and facilitate development in the Tourism industry. Specifically, aim to attract a greater number of domestic and international visitors, and increase the average length of stay.
- Ensure the long-term prosperity of operations at the Wimmera Intermodal Freight Terminal (WIFT) Precinct through infrastructure and service development.
- Encourage and facilitate industrial activity in allocated industrial areas and ensure they are well serviced by infrastructure.
- Facilitate further development at the Horsham aerodrome for aviation related activities.
- Encourage ongoing relationships with Regional Partners.
- Support retail sector.
- Support and promote Horsham Town Hall and Regional Art Gallery and other cultural offerings.

3. DEMOGRAPHICS

POPULATION



Horsham Rural City's population is growing at approximately 0.7% per annum. Between 2006 and 2016 the resident population increased from 18,498 to 19,887 (+7.5%).

This is moderate population growth when compared to Regional Victoria. Over the same period, Regional Victoria's population grew by approximately 12%.

Between 2016 and 2031, the population of Horsham Rural City is forecast to increase by 0.6% per annum, reaching a total population of approximately 21,800 by 2031.

Between 2006 and 2016, the population of the Wimmera Southern Mallee decreased from 48,441 to 47,156, which translates to a decrease of 2.7%. The population is forecast to decrease by a further 2.8% by 2031. It can be concluded that a proportion of the population in the WSMR are moving to HRCC.

AGE STRUCTURE



Horsham Rural City's resident population is living longer. Between 2016 and 2031, the proportion of residents aged over 65 years is expected to increase significantly in HRCC. The proportion of residents aged between 70 and 74 years are expected to increase by 41%, 75 to 79 years (+35%), 80 to 84 years (+32%) and over 85 years (+20%).

The expected increase in older residents will generate greater demand for health care and medical services in Horsham.

HOUSEHOLD COMPOSITION



The most common family composition in HRCC is couple families without children (43%) and couple families with children (40%).

89% of dwellings are occupied with the most common dwelling structure a separate house (88%), followed by a flat, unit or apartment (7%).

HOUSING AFFORDABILITY



As at 2015, the median house price in Horsham was \$240,000, which is considerably less than Victoria (\$490,000) and Regional Victoria (\$307,500).

In the ten year period, 2006 to 2015, Horsham's median price increased by 41%, which is comparable to Regional Victoria (40%), but less than Victoria (63%).

LEVEL OF DISADVANTAGE (SEIFA)



SEIFA (Socio-Economic Indexes for Areas) describes the relative level of socio-economic disadvantage in an area. Advantage is defined in terms of access to material and social resources and ability to participate in society. Australia's index is set up so that lower numbers are more disadvantaged, and higher numbers are less disadvantaged.

Horsham Rural City has a SEIFA score of 987, which ranks 45th most advantaged in Victoria (out of 80). In Regional Victoria, Horsham is ranked 18th most advantaged (out of 47 LGA's). Significant pocket of disadvantage in Horsham North (1st decile ranking)

4. ECONOMIC PROFILE

4.1. OVERVIEW

Horsham Rural City's economy is largely driven by:

- Agriculture; both dry land broadacre farming (grain and pulse production) and livestock grazing;
- Manufacturing; specifically, food products, metal products and transport equipment and parts;
- Construction;
- Public sector industries including Health, Education and Public Administration and Safety; and
- Retail and services; drawing on Horsham's role as the Wimmera's key commercial centre, Horsham employs a substantial number of retail and service sector workers.

HRCC has an unemployment rate of approximately 4%, and has experienced total employment growth of 2% between 2006 and 2016. Industry sectors that experienced the highest growth in employment in that time are Health Care and Social Assistance (+23%), Accommodation & Food Services (+11%), Electricity, Gas, Rental & Hiring (+8%) and Manufacturing (+8%).

Industry sectors that experienced a decline in employment between 2006 and 2016 include Rental, Hiring & Real Estate Services (-14%), Agriculture (-13%), Financial & Insurance Services (-9%), Professional & Scientific Services and Retail (-5%).

Due to Horsham's role as a major industry service centre for the Wimmera Southern Mallee region, job containment is high at 94%, meaning the vast majority of residents are employed within the municipality.

4.2. KEY ECONOMIC INDICATORS

	Horsham Rural City	Victoria
GROSS REGIONAL PRODUCT (GRP)	\$1.2 Billion	\$374 Billion
ECONOMIC OUTPUT	\$2.3 Billion	\$798 Billion
EMPLOYMENT	8,419 Jobs	2.4m Jobs
REGIONAL EXPORTS	\$708 Million	\$121 Billion
REGIONAL IMPORTS	\$548 Million	\$135 Billion
WAGES & SALARIES	\$574 Million	\$185 Billion

4.3. INDUSTRY OVERVIEW

INDUSTRY SECTOR	OUTPUT (\$M)	EMPLOYMENT (JOBS)	WAGES AND SALARIES (\$M)	LOCAL SALES (\$M)	REGIONAL EXPORTS (\$M)	LOCAL EXPENDITURE (\$M)	REGIONAL IMPORTS (\$M)	VALUE-ADDED (\$M)
Manufacturing	\$321.4	449	\$39.4	\$100.2	\$163.8	\$78.1	\$181.1	\$62.3
Construction	\$282.1	578	\$46.2	\$96.2	\$52.4	\$134.3	\$59.5	\$88.3
Rental, Hiring & Real Estate Services	\$219.9	78	\$6.2	\$32.3	\$2.1	\$39.8	\$20.3	\$159.7
Agriculture, Forestry & Fishing	\$180.0	735	\$13.9	\$32.8	\$136.4	\$69.1	\$43.6	\$67.3
Health Care & Social Assistance	\$162.5	1,417	\$98.1	\$2.1	\$47.5	\$26.7	\$19.0	\$116.8
Electricity, Gas, Water & Waste Services	\$138.4	193	\$21.2	\$36.3	\$83.6	\$44.6	\$15.9	\$77.8
Wholesale Trade	\$135.8	368	\$40.3	\$50.9	\$33.3	\$40.8	\$29.7	\$65.4
Retail Trade	\$127.2	1,162	\$50.0	\$18.9	\$26.1	\$30.0	\$19.2	\$78.0
Financial & Insurance Services	\$117.5	192	\$26.3	\$66.3	\$14.2	\$22.4	\$16.2	\$78.9
Public Administration & Safety	\$109.1	544	\$53.0	\$11.1	\$27.3	\$26.8	\$18.7	\$63.6
Transport, Postal & Warehousing	\$95.0	332	\$21.8	\$47.6	\$20.8	\$32.6	\$18.8	\$43.5
Accommodation & Food Services	\$80.4	588	\$21.8	\$11.9	\$22.0	\$17.8	\$28.5	\$34.1
Professional, Scientific & Technical Services	\$74.5	285	\$24.1	\$60.0	\$5.3	\$23.1	\$16.8	\$34.6
Education & Training	\$65.6	558	\$43.7	\$1.6	\$3.1	\$9.7	\$6.0	\$49.9
Administrative & Support Services	\$64.2	207	\$30.8	\$45.0	\$12.9	\$17.9	\$12.2	\$34.1
Other Services	\$58.5	439	\$20.6	\$17.3	\$15.9	\$16.9	\$11.8	\$29.8
Information Media & Telecommunications	\$49.1	102	\$8.3	\$22.5	\$11.6	\$11.2	\$16.4	\$21.4
Mining	\$31.4	35	\$3.9	\$1.6	\$28.5	\$9.2	\$10.5	\$11.7
Arts & Recreation Services	\$17.2	95	\$3.9	\$3.2	\$1.0	\$6.8	\$4.2	\$6.2
TOTAL	\$2,329.8	8,357	\$573.5	\$657.8	\$707.8	\$657.8	\$548.4	\$1,123.4

Source: Horsham Rural City Council, Remplan Economy 2017

PART B: **STRATEGIC FRAMEWORK**

This section outlines the strategies and actions to guide economic development in Horsham Rural City over the next five years (2017 - 2021).



5. ECONOMIC DEVELOPMENT FRAMEWORK

5.1. VISION

Horsham Rural City will actively engage and support its existing business base and continue to improve the wealth and wellbeing of its residents.

The City will build on its strong economic base, whilst diversifying the economy through facilitating investment and business attraction in existing and emerging industry sectors.

5.2. KEY THEMES

THEME 1	Best Practice in Economic Development	<i>Horsham Rural City will be a leader in economic development practices and embed a proactive open for business attitude across the organisation</i>
THEME 2	Primary Industries	<i>Horsham Rural City and its partners will continue to facilitate growth in primary industries including agriculture, processing, mining and renewable energy</i>
THEME 3	A Vibrant Central Activity District	<i>Horsham Central Activity District will continue to develop into a vibrant hub which supports services for Wimmera residents and visitors. The Central Activity District will become increasingly attractive for the services sector, professional and creative businesses and entrepreneurs.</i>
THEME 4	Public Sector Industry	<i>Horsham's health and education sector will continue to develop to meet the needs of the Wimmera Region and provide high quality services to the community</i>
THEME 5	Destination Horsham	<i>Horsham will become a strong recognisable brand in key markets and be renowned for its liveability, quality service sector, strong community values, food and creative industry. Tourism product and events will develop to drive visitors to the region to explore nature based assets and attend unique events and festivals.</i>
THEME 6	Economic Infrastructure	<i>Horsham Rural City will work towards attracting investment in critical infrastructure projects that support the economy including passenger rail services, dual carriage highway and Horsham Bypass, WIFT, the Aerodrome and IT/telecommunications.</i>

6. THEME 1: BEST PRACTICE IN ECONOMIC DEVELOPMENT

6.1. OBJECTIVE

Horsham Rural City will be a leader in economic development practices and embed a proactive open for business attitude across the organisation.

6.2. OVERVIEW

STRATEGIC CONSIDERATIONS

- Improvements in economic development governance;
- Clear definition of roles and responsibilities for the EDU;
- Form relationships with the local business community;
- Provide useful information to businesses;
- Support business growth;
- Promote networking and training opportunities;
- Attract new investment and industry;
- Embed economic development as a priority within Council decision-making;
- Promote sustainable business practices.

TARGETS AND MONITORING

- Decrease the turnaround time for business planning applications;
- Develop and maintain an up-to-date business database;
- Implementation of processes and procedures to ensure that the Economic Development Unit are engaging regularly and meaningfully with local businesses;
- Business and investment attraction.

6.3. CONSIDERATIONS

ROLE IN ECONOMIC DEVELOPMENT

The priority for economic development in Horsham Rural City should be focussed on supporting existing business, attracting new business and investment and improving the standard of living for the community.

The key economic development initiatives supported by local businesses and the community include:

- Further support and develop the Agriculture and Manufacturing industries;
- Attract transport, storage and logistics businesses;
- Further promote and market the region to investors, residents and visitors;
- Develop the retail sector (e.g. food & beverage, clothing & apparel, homewares & leisure);
- Attract new residents;
- Develop the tourism and events industry;
- Improve community and business networking and engagement;
- Township improvements (e.g. streetscape beautification); and
- HRCC being an employer of choice.

ECONOMIC DEVELOPMENT UNIT (EDU)

There should be a clear definition of roles between Council's Economic Development Unit and the Wimmera Development Association to ensure that there is minimal overlap in economic development activities.

It is recommended that the Economic Development Unit direct resources into business engagement and support, as well as tourism and event development and coordination. The WDA's role should be more focussed on facilitating larger scale business and investment attraction in the broader region.

Collaboration between the two is paramount and regular contact between Council and the WDA should continue to ensure information is shared.

ENGAGEMENT

Engaging with and supporting existing businesses is a critical component for the local economy.

Local businesses would like to see the role of the economic development unit to be focussed on supporting existing businesses in the City and improving the standard of living for the community. This could be achieved through the provision of a Client Relationship Management System (CRMS), whereby Council can interact and contact businesses and record engagements.

Council recognises that it is a major purchaser of goods, services and works that its procurement practices have the potential to impact the local economy. Council will endeavour to support local business and industries where such purchases can be justified in achieving value for money.

BUSINESS SUPPORT SERVICES: NETWORKING AND TRAINING

HRCC should review provision of information, training and support services to new and existing businesses across the Council area. Improved support services may encourage the attraction of new businesses, as well as improving performance for existing businesses.

Review of the following support services should include:

- Education and training – May include training and upskilling in social media, digital marketing, customer service, financial reporting and administration services.
- New Enterprise Incentive Scheme (NEIS) - Provides training and business set-up mentoring assistance for new businesses (currently offered by RMIT).
- Case management – Provide planning and building advice to new business/existing business regarding potential development.
- Networking events – This would need to be driven by businesses.
- Ongoing engagement and information to be provided to businesses.

6.4. BEST PRACTICE ECONOMIC DEVELOPMENT: STRATEGIES AND ACTIONS

STRATEGY 1 Improve the governance structures within the Economic Development Unit			
Actions		Lead and Partners	Timeframe
ACTION 1.1	<p>Clearly define the role and responsibilities for Council's Economic Development Unit with a focus on the following key areas:</p> <ul style="list-style-type: none"> - Business engagement and support; - Business and investment attraction; - Tourism (product development, investment attraction, marketing); - Festivals and events (engagement with existing event operators, event development, support and procurement); - Management of the Visitor Information Centre; and - Management of the Wimmera Business Centre. 	Planning & Economic Development	Short term
ACTION 1.2	Undertake regular meetings between the WDA and Council's Planning and Economic Development Department to inform and discuss economic development opportunities.	Planning & Economic Development / Planning Department / WDA / DEDJTR	Ongoing

STRATEGY 2 Engage and support new and existing businesses			
Actions		Lead and Partners	Timeframe
ACTION 2.1	<p>Develop a dynamic and up-to-date business database system and ensure information is correct, up-to-date, and cross references the most recent Australian Business Register (ABR) data. At a minimum, it should include the following fields:</p> <ul style="list-style-type: none"> - Name of Business; - Business Type; - Lead and Secondary Business Contact - Address; - Contact Details (phone & email address); - Industry Classification; and - Number of Employees. 	Planning & Economic Development / local businesses	Short term and ongoing
ACTION 2.2	<p>Investigate the establishment of an interactive Client Relationship Management System which can be used to record and track business engagement and report on economic development performance measures.</p> <p>Engage with EDA Victorian State Practitioners Network as to how this may be implemented and used.</p>	Planning & Economic Development / EDA	Short term
ACTION 2.3	Engage with businesses using a variety of methods. Develop a regular email newsletter to go to businesses on the business database (once completed), promoting Council projects, networking and training opportunities and grants programs.	Planning & Economic Development / Business Horsham / WBC	Ongoing
ACTION 2.4	Ensure staff within Council's EDU are visible and active in the business community.	Planning & Economic Development	Ongoing

STRATEGY 3 Promote business development and networking opportunities within the business community

Actions

Lead and Partners

Timeframe

ACTION 3.1 Facilitate education and training events with the business community. Topics may include:

- Marketing and advertising;
- Financial management and reporting;
- Business administration.

Planning & Economic Development / WBC / Federation University / LLEN

Medium term and ongoing

ACTION 3.2 Facilitate networking events with the business community.

Planning & Economic Development / Business Horsham / VFF / Wartook Promotions Group / Horsham Town Hall and Regional Art Gallery / Community groups

Short term and ongoing

7. THEME 2: PRIMARY INDUSTRIES

7.1. OBJECTIVE

Horsham Rural City and its partners will continue to facilitate growth in primary industries including agriculture, processing, mining and renewable energy.

7.2. OVERVIEW

STRATEGIC CONSIDERATIONS

- Volatility of commodity prices;
- Environmental challenges (e.g. drought);
- Leverage investment from Wimmera-Mallee Pipeline;
- Diversification within the sector;
- Mechanisation and consolidation of land/enterprise;
- Public awareness of the mining industry;
- Enabling infrastructure requirement (e.g. electricity interconnector).

TARGETS AND MONITORING

- Increase in agricultural production;
- Employment growth;
- Increase in output and regional exports;
- Increase in value-adding activities;
- Establishment of solar and wind farms;
- Facilitate construction phase for mineral sands projects.

7.3. CONSIDERATIONS

AGRICULTURE AND DOWNSTREAM INDUSTRY

Agriculture is Horsham Rural City's and the Wimmera Southern Mallee's most important industry. The sector generates \$180m in economic output per annum, which accounts for 8% of the City's total. The sector is also the second largest employer, behind retail, and has a regional export value in the order of \$136m per annum.

Furthermore, the Agriculture industry in the broader Wimmera Southern Mallee region generates an estimated \$866m in economic output per annum, employs 3,590 people and has a regional export value of \$671m.

There is an opportunity for Horsham Rural City to facilitate the diversification of the existing Agriculture sector by further developing sub-sectors and related activities to capitalise on the significant primary production activity.

There are opportunities for Horsham Rural City's Agriculture industry to facilitate diversification through encouraging the development of related activities such as value adding industry, new commodities, specialist services, research and education and improved transport connections to export markets.

Opportunities associated with agriculture include:

- Warehouse and storage (storage, cleaning, splitting, packaging);
- Transport and distribution (freight services, logistics);
- Retail and wholesale (farm gate, online, supermarkets);
- Primary production (intensive Agriculture);
- Agronomy (science & technology);
- Food manufacturing (cereals, protein powder, seeds and oils, abattoir); and
- Service industries (finance, insurance, IT, education, engineering).

WATER SECURITY

The Wimmera Mallee Pipeline, established in 2010, replaced 17,500 km of inefficient channels providing approximately 9,000 km of rural pipeline.

It is estimated that the pipeline saves an average of 103 billion litres of water per annum and provides a continuous water supply to approximately 7,000 rural customers and townships across the Wimmera and Mallee.

The Pipeline provides water security for the Agriculture sector and is of major benefit to the region. The Pipeline could be promoted to potential new agri-business that are looking to establish in the region.

MINERAL SANDS

The Wimmera region is home to a significant proportion of natural mineral deposits. Donald (Minyip), Avonbank, Drung South and Bungalally are the four key sites for mineral sands.

The Avonbank Project is projected to produce 488 million tonnes of Heavy Mineral Sands (HMS) and has a projected mine life of 32 years. Avonbank is forecast to commence mining in 2021.

The Bungalally HMS project incorporates over 20% Zircon. The project is located approximately 10 km south of Horsham.

Whilst these projects are either in pre-feasibility or feasibility stage, once construction commences and operations are underway, will generate significant economic benefits to Horsham including output, wages and salaries, and jobs.

The Wimmera Southern Mallee Mining Sector Plan (2012) considers the opportunities, constraints and key enabling factors required to further develop and grow the mining industry within the Wimmera Southern Mallee Region.

The Plan found that The Wimmera Southern Mallee region has significant competitive advantages that can enable the local industry to develop. These key advantages include:

- Accessible, large scale and high quality resource quantities;
- Secure water resources;
- High levels of liveability for the workforce, particularly compared to other mining regions;
- Established, experienced and responsive support industries;
- Experienced, stable and low cost workforce;
- Excellent transport linkages with an intermodal freight terminal at the heart of the region in Horsham, road and rail access to the Ports of Portland, Geelong, Melbourne, and Adelaide;
- Access to high quality research and training institutions;
- Competitively priced, reliable and accessible power and gas connections;
- Proactive State and Local Governments; and
- Regional social infrastructure - schools, health, sporting and cultural.

Growing the sector will have significant spill over benefits to the broader region. The sector is a high value adding activity and is therefore a driver of regional economic prosperity. Within the Wimmera Southern Mallee regional economy, mining produces the highest rates of return per job, and more than two times the value added benefits to the economy than any other sector from the same level of output growth.

Council in conjunction with the WDA should continue to encourage and facilitate the development of mineral sands mining and associated activity in an appropriate and sustainable manner.

RENEWABLE ENERGY

Horsham Rural City is well positioned to attract investment in large scale renewable projects, specifically solar and wind. Key advantages of establishing in Horsham include a large availability of land and long periods of sunlight.

In recent years, there has been lobbying with State Government to develop a third interconnector extending from Horsham into South Australia. The interconnector is required for energy storage and distribution.

The 4,250 ha Murra Warra Wind Farm, located approximately 25km north of Horsham has been approved and is expected to be operational by 2020. The farm will accommodate up to 116 turbines and a terminal station that will connect to the 220kV grid network.

The Murra Warra Wind Farm Economic Benefit Assessment (2016) identifies that the \$650 million investment will support 235 direct and 375 indirect FTE jobs during the construction phase. Once operational, the project will support 15 direct and 45 indirect FTE jobs.

Furthermore, the project has the capacity to supply sufficient clean energy to power approximately 250,000 homes and, in the process, reduce Co² emissions by an estimated 1.3 million tonnes per annum.

Biomass is another renewable energy opportunity that could be further explored and developed in the City. Biomass refers to the fuel that is developed from organic materials, a renewable and sustainable source of energy used to create electricity or other forms of power.

Some examples of materials that make up biomass fuels are scrap lumber, forest debris, certain crops, and manure. The use of these materials would create a significant opportunity in the supply chain.

Development in renewable energy and becoming energy efficient is a concept that is widely received and promoted by the Horsham community.

Natimuk Community Energy (NCE) is an organisation with a vision for the community to achieve self-sufficient energy production by 2030. To achieve this vision, NCE are in the process of introducing an energy buy-back scheme, which is dependent on solar energy production.

Whilst solar and wind farms generally support lower proportions of ongoing employment, they generate major capital expenditure and create employment opportunities throughout the planning, design and construction phases.

7.4. PRIMARY INDUSTRIES: STRATEGIES AND ACTIONS

STRATEGY 4 Encourage and facilitate the diversification of the Agricultural base through value-adding, research and innovation, new commodities and related activities			
Actions		Lead and Partners	Timeframe
ACTION 4.1	Encourage the development of intensive farming practices. Work with the State Government Department of Economic Development, Jobs, Transport and Resources, Agriculture Victoria, WDA and the local education and agricultural research sectors to promote intensive farming in suitable locations (i.e. access to Wimmera Mallee Pipeline).	Planning & Economic Development / WDA / Agriculture Victoria / GWM Water / VFF	Medium term
ACTION 4.2	Promote agri-tourism opportunities to industry. Establish an information kit which exposes primary industry to agri-tourism opportunities including case studies and information of the local market.	Planning & Economic Development / WDA / Agriculture Victoria / Grampians Tourism / VFF	Medium term
ACTION 4.3	<p>Promote the competitive advantages of the region to attract and develop agricultural supply chain businesses such as:</p> <ul style="list-style-type: none"> - Warehouse and storage (storage cleaning, splitting, packaging); - Transport and distribution (freight services, logistics); - Food manufacturing (cereals, protein powder, seeds and oils, abattoir). <p>Develop a prospectus which identifies key opportunities and supporting information and make contact with businesses out of region to understand prerequisites for establishing businesses in Horsham Rural City.</p>	WDA / Agriculture Victoria / Planning & Economic Development / DEDJTR	Medium term
ACTION 4.4	Promote the competitive strengths (e.g. Wimmera-Mallee Pipeline, WIFT) to encourage new agribusiness to establish in the region.	WDA/ Planning & Economic Development / Agriculture Victoria / DEDJTR	Medium term

STRATEGY 5 Engage and support the agricultural business community, and ensure the region remains the leader in grain production, research, education and innovation			
Actions		Lead and Partners	Timeframe
ACTION 5.1	Develop a business database of agri-business firms (this may be undertaken as part of Action 2.1)	Planning & Economic Development	Short term
ACTION 5.2	<p>Ensure there is an experienced economic development officer responsible for engaging with the Agriculture sector. This includes developing strategic relationships with:</p> <ul style="list-style-type: none"> - Businesses; - Relevant State and Federal government personnel (e.g. Agriculture Victoria, GWM Water); - Industry groups; and - Education institutions (e.g. Longerenong College). <p>The nominated staff member should have a strong understanding of local agricultural conditions.</p>	Planning & Economic Development / WDA	Short term
ACTION 5.3	<p>Participate in an annual roundtable event for the Agriculture industry representatives. Discussion points should include, but are not limited to the following:</p> <ul style="list-style-type: none"> - The current state of the industry (economic conditions); - Current challenges/barriers to industry growth; - Opportunities for industry growth; - The regulatory environment; and - Research and innovation. 	Planning & Economic Development / WDA	Short term
ACTION 5.4	Develop strategic relationships with key personnel of large businesses in the region, and encourage them to become active in the local industry to share their expertise.	Planning & Economic Development	Short term

ACTION 5.5	Advocate for the development of enabling infrastructure (e.g. upgrades to the WIFT precinct, road upgrades and Burnt Creek Estate)	WDA / Planning & Economic Development / DEDJTR	Ongoing
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STRATEGY 6 Encourage and facilitate development in the renewable energy industry

Actions	Lead and Partners	Timeframe
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ACTION 6.1	Continue to lobby the State and Federal Government to establish a third electricity interconnector between Horsham and Keith.	WDA / Department of the Environment and Energy / RDV / DEDJTR	Short to medium term and ongoing
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ACTION 6.2	Seek to upgrade existing smaller capacity transmission lines.		
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ACTION 6.3	Widely promote the advantages of establishing solar and wind farms in Horsham Rural City (e.g. land availability, long period of sunlight) and continue to facilitate investment in this area.	WDA / Planning & Economic Development / DEDJTR	Ongoing
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ACTION 6.4	Facilitate a series of electric vehicle charge points within the Horsham town centre.	WDA / Planning & Economic Development	Short to medium term
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STRATEGY 7 Encourage and facilitate development in the mineral sands industry

Actions	Lead and Partners	Timeframe
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ACTION 7.1	Continue to work with industry stakeholders to facilitate mineral sands projects.	WDA / Planning & Economic Development / DEDJTR	Long term
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8. THEME 3: A VIBRANT CENTRAL ACTIVITY DISTRICT

8.1. OBJECTIVE

Horsham Central Activity District will continue to develop into a vibrant hub which supports services for Wimmera residents and visitors. The Central Activity District will become increasingly attractive for the services sector, professional and creative businesses, and entrepreneurs.

8.2. OVERVIEW

STRATEGIC CONSIDERATIONS

- Discourage out of centre development;
- Address challenges facing retailers (e.g. online retail, impact of seasonal agriculture production on retail expenditure, customer service & satisfaction);
- Improve CAD's connection to the Wimmera River;
- Encourage investment/redevelopment of key sites in the CAD;
- Capturing passing trade – attracting self-drive visitors into the CAD;
- Underrepresentation of professional, financial and creative services;
- Develop hospitality and entertainment in the CAD; and
- Recognise the role of the Horsham Town Hall as the arts precinct.

TARGETS AND MONITORING

- Increase retail turnover;
- Employment growth within the CAD;
- Reduction in vacancy rates for retail/commercial properties;
- Commercial development within the CAD;
- Deliver and implement CAD Revitalisation Strategy;
- Critical mass of day/night activity;
- Growth in professional and business services;
- Improved perceptions for customers and visitors.

8.3. CONSIDERATIONS

CAD REVITALISATION

Horsham's Central Activity District (CAD) is a vibrant hub of retail, commercial, entertainment, hospitality, cultural and community activity. The town centre services a catchment far greater than the Council area, attracting people from across the Wimmera for a range of retail, entertainment, health and medical, and professional and financial services.

It is estimated that Horsham's CAD services a resident catchment of 51,000 people. Horsham has a strong service role for the surrounding Local Government Areas of Northern Grampians, West Wimmera, Hindmarsh and Yarriambiack. Residents within the broader catchment travel to Horsham for higher order retail and commercial needs.

The Retail Trade industry is strong in terms of output and employment. Horsham offers a diverse range of retailers and includes majors such as three full-line supermarkets (Coles, Woolworths and Aldi), Harvey Norman, Kmart, Target, Bunnings Warehouse and Supercheap Auto.

Shoppers visit Horsham for higher order retail needs including apparel, homewares, leisure, clothing and apparel, retail services and bulky goods.

In addition to major retailers, Horsham provides boutique retail and food and beverage establishments, which highlights that the retail offer caters to a variety of needs.

There is an opportunity to revitalise certain areas of the CAD to improve access and connectivity, as well as providing areas of open space for people to passively recreate and engage.

UNDERREPRESENTATION OF PROFESSIONAL SERVICES

The Professional, Technical and Scientific Services sector generates \$74 million in economic output per annum, which accounts for 3% of total output for HRCC. This ranks lower than industries such as Accommodation and Food Services, Transport, Postal and Warehousing and Public Administration and Safety.

In 2016, there were an estimated 285 people employed in this sector, which accounts for 3% of total people employed. Employment in the sector decreased by 7% for the period 2006 to 2016.

Consultation with industry have suggested that this sector is underrepresented in terms of employment and therefore, is recognised as a growth opportunity for HRCC, particularly in digital and creative professional services such as marketing, advertising, design, software & IT, architecture and public relations.

There is an opportunity to work with existing professional businesses to attract new workers, and understand business needs.

SELF-DRIVE VISITORS

Horsham is located at the mid-point between Melbourne and Adelaide. According to Tourism Research Australia, approximately 800,000 self-drive visitors travel between the two cities each year.

There is an opportunity for Horsham to further capitalise on the significant number of passenger vehicles travelling through on a daily basis. Horsham should position itself as the ideal stopover town for self-drive visitors.

Further development initiatives should be explored in order to capture a proportion of passing trade. Examples may include:

- Improve wayfinding signage;
- Improve promotional signage for local attractions, entertainment and food and beverage;
- Continue to develop food and beverage product (e.g. cafes, restaurants, produce);
- Improve the major entrances of the town (e.g. beautification of the public realm, streetscape improvements, tree plantings); and
- Explore the potential to provide free camping in certain areas.

WIMMERA BUSINESS CENTRE

The Wimmera Business Centre is located in Horsham's town centre and is a small business incubator, offering tenancy to start up and home-based businesses, as well as offering business advice, support services and assistance to small and micro businesses.

The Centre accommodates a diverse range of businesses throughout its 18 spaces as well as 2 rooms for casual hire. There are a small number of vacancies.

An opportunity exists to redevelop the Wimmera Business Centre to increase capacity, improve the facilities offered and encourage a critical mass of business activity in Horsham.

If redeveloped, the incubator should provide office floorspace, meeting rooms, hot desks, high-speed internet, as well as opportunities for professional development, training and networking.

In the interim, Council should continue to encourage existing businesses; including home-based business and micro businesses to utilise the Centre.

CREATIVE INDUSTRY

Analysis of the local business base highlights a significant gap in creative industry. This includes Architects, graphic designer, marketing and IT professionals.

Due to this gap, these services are sourced from outside the Wimmera.

Other creative industry such as writers, artists and performers may be encouraged to settle in Horsham Rural City. The Horsham Town Hall precinct is an outstanding creative industry space which should be promoted to attract creative industry to settle in the region.

Working with the community development team, a focus on promoting the creative sector will enhance liveability, attraction and the economy.

8.4. A VIBRANT CENTRAL ACTIVITY DISTRICT: STRATEGIES AND ACTIONS

STRATEGY 8 Continue to develop Horsham’s Central Activity District (CAD) into a vibrant hub of retail, commercial, entertainment, hospitality, cultural and community activity			
Actions		Lead and Partners	Timeframe
ACTION 8.1	Deliver and implement the findings from the Horsham CAD Revitalisation project.	Technical Services / Planning & Economic Development	Short term
ACTION 8.2	Investigate the establishment of a central public plaza or square as the focal point for Horsham.	Technical Services / Planning & Economic Development	Short term
ACTION 8.3	Deliver the multi-use indoor sports facility at the preferred site (McBryde Street).	Technical Services / Community Services / Planning & Economic Development	Short term
ACTION 8.4	Deliver and implement the findings from the Horsham Railway Corridor Master Plan.	Technical Services / Planning & Economic Development/ Community Services	Short to medium term
ACTION 8.5	Ensure Horsham’s CAD is considered the prime location for future development in retail, commercial office, entertainment and community land uses. Identify fringe areas to the South of the CAD as long term areas for commercial growth. Future CAD development should align with CAD Revitalisation Strategy.	Planning & Economic Development	Short to medium term and ongoing
ACTION 8.6	Promote the CAD to potential hospitality operators to attract high quality food and beverage product such as: <ul style="list-style-type: none"> - Gastronomy pub; - Restaurants and cafés; - Provedores; and - Wine bar/microbrewery. 	Planning & Economic Development	Ongoing

STRATEGY 9 Improve access, connectivity, appearance and functionality of Horsham's CAD			
Actions		Lead and Partners	Timeframe
ACTION 9.1	Deliver and implement the findings from the Horsham Car Parking Strategy.	Technical Services / Planning & Economic Development	Short to medium term
ACTION 9.2	Deliver and implement the findings from the Wimmera River Corridor Masterplan, ensuring the CAD's connection to the River is addressed	Technical Services / Planning & Economic Development	Short term
ACTION 9.3	<p>Improve wayfinding and promotional signage at the town's main entrances to encourage the capture of passing trade. Promotional signage should refer to:</p> <ul style="list-style-type: none"> - Local attractions (e.g. Town Hall, Wimmera River, Botanical Gardens); - Visitor Information Centre; and - Popular hospitality precincts. 	Technical Services / Planning & Economic Development	Short term
ACTION 9.4	Improve the public realm at Horsham's main entrances. Streetscaping, tree plantings and road upgrades should be the areas of focus.	Technical Services / Planning & Economic Development	Medium term

STRATEGY 10 Encourage and facilitate growth in professional, financial and creative service industries

Actions		Lead and Partners	Timeframe
ACTION 10.1	Engage with existing professional services businesses to understand labour force requirements and other business needs.	Planning & Economic Development / Local businesses	Short term
ACTION 10.2	Establish a targeted marketing program to encourage qualified professionals to join Horsham professional service firms.	Planning & Economic Development / Local businesses	Short term
ACTION 10.3	Encourage the development of office accommodation in the CAD.	Planning & Economic Development	Ongoing
ACTION 10.4	Investigate the potential to redevelop and expand the Wimmera Business Centre to meet contemporary business needs. In the short term, encourage greater utilisation of the existing Wimmera Business Centre.	Planning & Economic Development	Medium term
ACTION 10.5	Promote creative industry opportunities in Horsham through promotion and branding of Horsham as a cosmopolitan and progressive town.	Planning & Economic Development / Local businesses	Short term
ACTION 10.6	Leverage greater benefit from the Horsham Town Hall precinct by exploring: - Establishing a pedestrian and performance zone opposite the Town Hall theatre in Ward Street; - Attraction of entertainment and dining businesses to the precinct; and - Business/conference market.	Community Services / Planning & Economic Development / Horsham Town Hall & Art Gallery	Short term
ACTION 10.7	Develop and promote Horsham Town Hall, Art Gallery and arts and cultural events and offerings.	Community Services / Horsham Town Hall & Art Gallery / Planning & Economic Development / RDV	Ongoing

9. THEME 4: PUBLIC SECTOR INDUSTRY

9.1. OBJECTIVE

Horsham's health and education sector will continue to develop to meet the needs of the Wimmera Region and provide high quality services to the community.

9.2. OVERVIEW

STRATEGIC CONSIDERATIONS

- Horsham's resident population is forecast to age;
- Greater demand for health and medical services;
- Capacity constraints at the Wimmera Base Hospital;
- Student migration from Horsham to Ballarat and Melbourne for tertiary education;
- Foster strong pathways between tertiary institutions and the workforce.

TARGETS AND MONITORING

- Improvements and upgrades to Health precinct;
- Increase in public sector employment;
- Increase in tertiary education attainment;
- Improvements to Longerenong College facilities;
- Reduction in students travelling to Ballarat/Melbourne for education attainment.

9.3. CONSIDERATIONS

HEALTH CARE AND SOCIAL ASSISTANCE

Horsham and the broader Wimmera region's population is forecast to age significantly over the next 15 years. Between 2016 and 2031, the proportion of residents aged over 65 years is expected to increase significantly in HRCC. Residents aged between 70 and 74 years are forecast to increase by 41%, 75 to 79 years (35%), 80 to 84 years (32%) and over 85 years (20%).

The expected increase in older residents will generate greater demand for health care and medical services in Horsham.

Consulting with Wimmera Health Care Group, there is a short to medium term need for a redevelopment of the Hospital, specifically as a result of capacity constraints.

A recent contribution of state funding for the development of the Wimmera Cancer Centre will significantly bolster health services in the region. Once completed, the Centre will include nine new day chemotherapy chairs, a wellness service, six renal dialysis chairs and modern accommodation facilities for palliative care.

EDUCATION

The local community has indicated that secondary and tertiary educational institutions in Horsham are adequate, however, there are a proportion of students travelling to Ballarat and other areas to seek private secondary education.

Holy Trinity Lutheran School in Horsham is undergoing a significant expansion. When completed, the School will boast several new classrooms, a large collective learning area, 2D and 3D art rooms, staff rooms, a food technology centre, music and drama rooms, and a video and audio recording studio.

The School, which previously offered education from prep to year 10 only; is planned to cater to year 11 students from 2018, and year 12 students from 2019.

Horsham has a competitive advantage with its Agricultural College in Longerenong. Longerenong College is the only Agricultural education institution that offers an advanced diploma in Agribusiness Management.

Federation University's Horsham campus delivers TAFE programs and bachelor courses in Social Sciences, Business and as well as Masters programs and PhD Research.

According to Federation University, the highest proportion of students are enrolled in health services, community services, education and business services. The key gap in tertiary programs in the region is humanity based courses, in particular, history, politics and the arts.

9.4. PUBLIC SECTOR INDUSTRY: STRATEGIES AND ACTIONS

STRATEGY 11 Develop Horsham into the leading education provider for Agribusiness and related industries			
Actions		Lead and Partners	Timeframe
ACTION 11.1	Facilitate and encourage Longerenong College to attract international students.	Planning & Economic Development / Longerenong College / Skill Invest	Short term
ACTION 11.2	Advocate for the redevelopment of Longerenong College's on-site infrastructure and facilities. (e.g. chemical training facility, internal campus roads, lecture/theatre rooms). Ongoing discussions with Longerenong College should be undertaken to prioritise infrastructure and service upgrade requirements.	Planning & Economic Development / Longerenong College / Skill Invest	Ongoing
STRATEGY 12 Ensure existing education institutions are meeting the needs of the resident and business community			
Actions		Lead and Partners	Timeframe
ACTION 12.1	Engage with Federation University to ensure suitable courses are being offered that meet local needs. Ensure there is adequate information which identifies skills gaps (e.g. apprenticeships/training programs)	Planning & Economic Development / local secondary and tertiary institutions	Short term

STRATEGY 13 Ensure Health Care and Medical Services are servicing the needs of Horsham and the broader region

Actions		Lead and Partners	Timeframe
ACTION 13.1	Continue to engage and develop a close relationship with the Wimmera Health Care Group and the community sector as one of Horsham’s key employers.	Planning & Economic Development / Wimmera Health Care Group	Ongoing
ACTION 13.2	Advocate for the preparation of a Master Plan for the Health and Medical Precinct on Bailie Street. This will investigate redevelopment of the Hospital to meet current and future need and also plan for other community and health services in the precinct.	Planning & Economic Development / Technical Services / Community Development / Wimmera Health Care Group	Medium to long term
ACTION 13.3	Advocate for business relocation / establishment in the community sector.	Planning & Economic Development / Community Services	Ongoing

10. THEME 5: DESTINATION HORSHAM

10.1. OBJECTIVE

Horsham will become a strong recognisable brand in key markets and be renowned for its liveability, quality service sector, strong community values, food and creative industry. Tourism product and events will develop to drive visitors to the region to explore nature based assets, attend regional, state, national and international events and festivals.

10.2. OVERVIEW

STRATEGIC CONSIDERATIONS

- Improve awareness of Horsham throughout Victoria and South Australia;
- Lack of destination brand;
- Ensure there is a coordinated and collaborative approach to marketing and branding;
- Need for marketing and promotional content for Horsham to attract visitors, residents, workers and businesses.
- Tourism product development;
- Provision of visitor services.

TARGETS AND MONITORING

- Develop a destination brand for Horsham.
- Increase in domestic and international visitation.
- Increase in average length of stay.
- Increase in visitor yield.
- Investment in tourism product development.

10.3. CONSIDERATIONS

AFFORDABLE HOUSING

Housing in Horsham and Natimuk is more affordable compared to other regional areas and the rest of the State.

According to A Guide to Property Values, the median house price in Horsham in 2015 was \$240,000, which is less when compared to Regional Victoria (\$307,500) and the rest of the State (\$490,000).

The median residential property value in Horsham is a competitive advantage that could be further promoted to prospective residents and businesses, buyers in the market who are looking to trade up, particularly from western Victorian towns such as Ballarat.

Housing affordability should be promoted to attract new residents.

LIVEABILITY

The liveability and lifestyle of Horsham as a rural city is considered a competitive advantage. A strong community, proximity to an abundance of natural assets, a favourable climate and reliable health and education services all contribute to Horsham's liveability.

Horsham is in close proximity to Mount Arapiles, the Grampians National Park and a significant number of waterways, which include Lake Toolondo, Lake Wartook, Green Lake, Taylors Lake, Rocklands Reservoir, Natimuk Lake, Little Desert National Park, Black Range State Park and Wimmera River.

Horsham is an ideal location for people interested in recreational boating, fishing, outdoors and adventure.

SETTLEMENT SERVICES

HRCC should review the settlement service strategy for new residents, which provides information to support and assist new residents in the region. This could be particularly helpful for ethnic groups settling in the region.

BRAND AND AWARENESS

There is limited understanding of the way Horsham is perceived in Melbourne and the rest of Victoria.

A market research study should be conducted to understand the way Horsham is perceived including positive and negative aspects.

A new destination brand should then be tested which can be used for the visitor economy, resident and business attraction. An example of a prominent marketing campaign is the 'great things happen here' campaign for Shepparton. The campaign showcases a number of national brands and industries that are located in Shepparton, whilst also promoting the lifestyle advantages of the area.

Any branding recommendations should be prepared in conjunction with the CAD revitalisation study to ensure alignment.

TOURISM USES ALONG THE WIMMERA RIVER

The Wimmera River is a major natural asset in close proximity to Horsham's town centre. Tourism uses should be further explored for the land surrounding the River. Potential uses include:

- Recreational boating infrastructure;
- Fishing infrastructure;
- Picnic/BBQ;
- Food and beverage;
- Accommodation;
- Public art installation;
- Artist in residence facility;
- Conference/function centre;
- Recreational tracks and trails (walking and cycling); and
- Adventure operators.

It is noted that a Master Plan is currently underway for the Wimmera River to identify potential development opportunities.

FOOD AND BEVERAGE PRODUCT

The most common and popular activity for domestic overnight visitors in Regional Victoria is eating out at a restaurant and/or café, with 58% participating in the activity.

In order to further develop Horsham as a destination in its own right, the development and provision of high quality food and beverage product presents a key opportunity to achieve this. High quality dining options such as cafés, a gastronomic pub/hotel, provedore, microbrewery and/or wine bar should be considered for Horsham's CAD to contribute to a vibrant town centre and attract visitors.

The development of food and beverage offer in line with regional produce strengths such as regional pulse production could be a point of difference for Horsham.

FESTIVALS AND EVENTS

Between 2012 and 2016, an average of 4% of domestic overnight visitors to Horsham visited for the purpose of attending an event. This is marginally higher than the average for Regional Victoria (2%).

Tourism events are an effective method of attracting visitors from outside of the region that wouldn't ordinarily visit.

The annual event calendar in Horsham supports a proportion of visitation to the Council area. The existing event calendar predominantly consists of music, performing arts, motocross, and art and cultural events.

The Town Hall is a major asset for the region and has the potential to accommodate more events throughout the year. Further marketing and promotion of events held at the facility would expand its reach.

The Wimmera Event Centre is a modern purpose built large scale event venue, located on 23 hectares or land. The venue includes two large scale pavilions, a number of smaller pavilions, meeting rooms, facilities for on-site camping, catering areas, sheds and outbuildings.

The Centre can accommodate a range of large scale events, from music concerts and festivals to conferences, shows and exhibitions. The Centre can also accommodate smaller functions and events such as seminars, meetings, and social functions. An example of an existing major event held at the Centre is the Wimmera Machinery Field Days.

Council's relationship with Sports Marketing Australia should be ongoing to assist with securing sports tourism events. Sports Tourism is a significant economic driver and brings in an average of \$1.6 million per annum.

There is a proposal to establish a new indoor sports stadium in Horsham. A feasibility study was prepared in 2016, and a preferred site at McBryde Street has been agreed on. A funding strategy is underway for the project.

The proposed multi-use indoor sports stadium will significantly bolster the regions ability to attract and host regional and state sport and recreation events. The preferred site in McBryde Street is in close proximity to Horsham's CAD, which will promote economy activity within the CAD.

There is an opportunity to increase the provision of events in Horsham Rural City that align with the region's competitive strengths and may include:

- Fishing and boating;
- Food and wine;
- Outdoor and adventure (e.g. rock climbing);
- Arts and culture;
- Motorsport (go-cart track / Speedway);
- Motocross and 4WD;
- Agriculture / farm gate; and
- Sport and recreation.

NATURAL ASSETS

An abundance of natural assets including lakes, rivers, National & State parks are within a 50-kilometre radius of Horsham. Major assets such as the internationally renowned climbing destination; Mount Arapiles Tooan State Park, as well as Mount Stapylton and Mount Zero in the Grampians National Park attract a significant level of annual visitation.

Mount Arapiles is located in Mount Arapiles-Tooan State Park. The Mountain caters to varying levels of climbing experience, from beginners to advanced, and attracts an abundance of visitors, both domestic and international.

Horsham is in close proximity to a major network of waterways, which include Lake Toolondo, Lake Wartook, Green Lake, Taylors Lake, Rocklands Reservoir and Natimuk Lake.

Lakes in the region provide opportunities for local and visitors to undertake water-based activities such as swimming, fishing, recreational boating and water-skiing.

Upgrading infrastructure and services at prominent water destinations to support existing visitors and encourage new visitors should be considered in consultation with appropriate land managers. This includes the provision of boat ramps, fishing jetties, picnic/BBQ, camping and toilet facilities should be considered.

ACCOMMODATION

Based on accommodation preferences for domestic overnight visitors, the existing accommodation supply in Horsham is predominantly hotel/motel accommodation with a star rating between 3 and 4. Much of the existing stock is considered outdated and in need of refurbishment.

The existing accommodation gap in Horsham is a high quality serviced apartment and/or hotel establishment.

THE GRAMPIANS

The Grampians presents a challenge and opportunity for tourism in Horsham. The Grampians itself is a major tourism asset and nature based destination in Victoria, however there appears to be very little connection between Horsham and the

Grampians in the eye of the visitor. One of the reasons for this is that the majority of visitors to the Grampians travel from Melbourne and do not bypass Horsham.

To investigate opportunities the following elements should be considered:

- How to create improved connectivity between the Grampians and Horsham;
- Is there a need to promote Horsham as a destination of its own right, drawing on its growing strengths in arts and food?
- How to encourage development and activity in the Western Grampians including the Wartook Valley and Mt Zero areas.
- Encourage connectivity to the Grampians from Adelaide and South Australia.

Once completed, The Grampians Peaks Trail will become one of Victoria's longest and iconic trail. The first section is now complete and offers a 36 km, 3 day/2 night circuit walk, commencing at Halls Gap.

Constructing the trail will continue until the end of 2019, and is expected to become a drawcard attraction for domestic and international visitation. Discussions should be undertaken with Grampians Tourism to determine how Horsham can leverage further off the Grampians, and the Peaks Trail, particularly given that Mount Zero will be the trail head.

INTERSTATE VISITOR MARKETS

An opportunity exists for Horsham to attract a greater proportion of visitors from South Australia. Horsham is located approximately 420 km from Adelaide, and is considered the approximate midpoint between Melbourne and Adelaide.

Marketing Horsham as a destination to visit, live and work should be extended into South Australia.

10.4. DESTINATION HORSHAM: STRATEGIES AND ACTIONS

STRATEGY 14 Promote Horsham as a destination to live, work, invest and visit			
Actions		Lead and Partners	Timeframe
ACTION 14.1	Undertake a market research study throughout Victoria and South Australia to understand the public's awareness and perception of Horsham and other nature based assets in the Wimmera/Grampians.	Planning & Economic Development / Parks Victoria	Medium term
ACTION 14.2	Develop a prospectus for Horsham Rural City, which promotes the area as a destination to live, work, invest and visit. The Prospectus could include the following elements: <ul style="list-style-type: none"> - Lifestyle advantages (e.g. proximity to nature based assets, strong community, favourable climate, strong health and education services); - Investment opportunities (e.g. Wimmera-Mallee Pipeline, WIFT, land availability and affordability); - Tourism product and attractions (e.g. Mount Arapiles Lakes and Waterways, Town Hall, food and beverage, festivals and events). 	Planning & Economic Development / Grampians Tourism / Parks Victoria / DELWP / GWM / Barengi Gadjin Land Council	Short term
ACTION 14.3	Review a New Residents Services Strategy in Horsham Rural City.	Community Services	Medium term
ACTION 14.4	Develop a destination brand for Horsham. This should be prepared in conjunction with the CAD Revitalisation project and the community.	Planning & Economic Development / Technical Services	Medium term

STRATEGY 15 Promote and facilitate private and public sector tourism development opportunities

Actions		Lead and Partners	Timeframe
ACTION 15.1	<p>Ensure the Wimmera River Corridor Master Plan considers tourism uses such as:</p> <ul style="list-style-type: none"> - Recreational boating infrastructure; - Fishing infrastructure; - Picnic/BBQ; - Food and beverage; - Accommodation; - Public art installation; - Conference/function centre; - Recreational tracks and trails (walking and cycling); and - Open water swimming. 	<p>Planning & Economic Development / Technical Services / CMA / GWM / Barngi Gadjin Land Council / Parks Victoria / DELWP</p>	<p>Short term</p>
ACTION 15.2	<p>Develop infrastructure at destination Lakes and waterways in Horsham Rural City to encourage greater visitation. This could include:</p> <ul style="list-style-type: none"> - Toilets; - Campgrounds; - Picnic/BBQ facilities; - Boat ramps/fishing jetties; and - Wayfinding signage. 	<p>Planning & Economic Development / Technical Services / CMA / GWM / DELWP / Parks Victoria</p>	<p>Medium to long term</p>

ACTION 15.3	Review the Grampians Destination Plan and undertake a tourism masterplan for the Western Grampians. This will investigate private and public-sector investment opportunities and marketing approach. This should consider: <ul style="list-style-type: none"> - New food, beverage and accommodation opportunities in the scenic Mount Zero area. This will identify ways to leverage from the Peaks Trail; - Nature based and indigenous tourism opportunities in the Wartook Valley and Grampians National Park. This should explore accommodation investment, tour operators, indigenous interpretation and a near complete gravel cycling loop; - Implementation of recommendations from the Grampians Ring Road Study; - Wimmera River Trail, linking Wartook with Horsham. 	Planning & Economic Development / Technical Services / Parks Victoria / Traditional owners / Grampians Tourism	Medium to long term
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ACTION 15.4	Explore the establishment of the Wimmera River Art Trail. The Wimmera River Trail provides the opportunity to create a key destination experience in the Wimmera Region, linking the Grampians, Horsham, Natimuk and the Wimmera Art Silos. This project is currently being explored by the Grampians Cycling Masterplan.	Planning & Economic Development / Technical Services /	Short term
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STRATEGY 16 Promote the development of food and beverage tourism leveraging from regional produce strengths

Actions	Lead and Partners	Timeframe
ACTION 16.1 Attract experienced hospitality operators to Horsham to establish destination dining.	Planning & Economic Development	Medium term
ACTION 16.2 Encourage the use of local produce in restaurants and cafes by: <ul style="list-style-type: none"> - Providing information to local producers in conjunction with local produce stores promoting opportunities to sell locally; - Develop a regional produce brand; and - Encourage the use of native ingredients. 	Planning & Economic Development	Ongoing

STRATEGY 17 Develop Horsham’s calendar of festivals and events			
Actions		Lead and Partners	Timeframe
ACTION 17.1	Commission the preparation of a Horsham Events Strategy that includes the following: <ul style="list-style-type: none"> - Audit of existing festivals and events; - Audit of existing event venues; - Assessment criteria for new and existing events, which considers factors such as number of attendees, proportion of visitors, economic implications, and alignment with destination brand; and - Prioritisation for event procurement and development. 	Planning & Economic Development	Medium term
ACTION 17.2	Dedicate a staff member within the EDU who is responsible for facilitating existing events, as well as procuring new events.	Planning & Economic Development	Short term
ACTION 17.3	Support infrastructure improvements to facilitate Sports Tourism: <ul style="list-style-type: none"> - Horsham Motocross; and - Wimmera Sports Stadium. 	Technical Services	Short term
STRATEGY 18 Ensure the region is providing adequate visitor information services			
Actions		Lead and Partners	Timeframe
ACTION 18.1	Implement the recommendations from the review of Horsham’s Visitor Information Centre. This should address the following: <ul style="list-style-type: none"> - The location and utilisation of the existing Visitor Information Centre (VIC); - Online / digital presence; and - Visitor information needs/requirements. 	Planning & Economic Development	Medium term

11. THEME 6: ECONOMIC INFRASTRUCTURE

11.1. OBJECTIVE

Horsham Rural City will work towards attracting investment in critical infrastructure projects that support the economy including passenger rail services, dual carriage highway and Horsham Bypass, WIFT, the Aerodrome and IT/telecommunications.

11.2. OVERVIEW

Delivering major infrastructure projects in the region would create significant economic development opportunities in the region.

STRATEGIC CONSIDERATIONS

- Barriers to attracting funding;
- Consideration of infrastructure priorities;
- Economic implications of projects (e.g. economic impact).

TARGETS AND MONITORING

- Major infrastructure project delivery;
- Construction and ongoing employment supported.

11.3. CONSIDERATIONS

WESTERN RAIL

Consultation with industry and the community identified that there is a significant opportunity to extend passenger rail services from Ararat to Horsham, creating a service from Melbourne to Horsham. This would enable greater connectivity through the provision of efficient public transportation, creating opportunities for local businesses and the community.

A Feasibility Study was prepared to determine the viability of establishing a passenger rail service throughout the Grampians and Barwon South West Region. Specifically, the Study assessed the cost to reinstate passenger rail services to Horsham and Hamilton.

Western Rail outlined that for stage 2 of the project, passenger services should be reinstated to Horsham and Hamilton by 2023, providing six daily return train services to Ararat, four to Horsham and three to Hamilton. These would connect at Ballarat with direct trains to and from Melbourne.

Whilst the capital expenditure estimated for this project is significant and stage two is beyond the scope of this Strategy, it remains a key infrastructure priority for local business and the community.

DUAL CARRIAGE HIGHWAY

The efficient transportation of freight in and out of the Wimmera is paramount. WIFT has created an alternative method of transporting freight out of Horsham, however many businesses are still very reliant on heavy vehicle transportation.

The Western Highway is single lane from Ararat to Horsham and continues into South Australia. The duplication of the Western Highway would increase capacity, reduce travel times and improve safety for freight and passenger transport.

The upgrade of the Western Highway would also encourage greater self-drive visitation between Melbourne and Adelaide.

HORSHAM BYPASS

In 2015, VicRoads prepared an amendment to the Horsham Planning Scheme (C72) which sought to introduce a Public Acquisition Overlay (PAO) to reserve land for a future Horsham bypass.

VicRoads is considering the planning and implementation of a bypass that will focus on taking traffic around Horsham. Planning is also required to connect each of the highway “legs” with key destinations within Horsham, as the Horsham Integrated Transport Strategy (draft, 2016) identified that around half of the truck journeys using these highways either start or finish in Horsham. In particular, improved links are required with Horsham’s key existing industrial area, in the Golf Course Rd area, and the WIFT. An important element of this planning includes the provision of an additional river crossing to the south and west of Horsham.

At some stage, a bypass is likely to proceed. A separate strategy will be required to manage the transition to the bypass, including strategies to encourage tourists to stop in Horsham for retail, accommodation and other services, and for the potential for development of highway related services on the new bypass alignment.

WIMMERA INTERMODAL FREIGHT TERMINAL (WIFT)

WIFT’s establishment in 2012 has increased the region’s use of rail as an efficient mechanism to transport grain.

The 2016 harvest was close to a record for the region, contributing to a significant increase in container throughput at the site. Container numbers increased from 900-1,200 twenty-foot equivalent units (TEU) per month, to 2,000-3,000 per month since harvest.

In 2016/17, The WIFT recorded a throughput of 23,567 TEU, which is above the 2020-21 projected activity for the site (22,900 TEU).¹

In 2017, throughput in January was close to the design capacity of the site, and February was marginally greater than the design capacity of the site of 105 TEU per day.

Due to the increase level of throughput activity on the site, the WIFT requires more infrastructure to expand operations. Specifically, infrastructure is required to increase the storage capacity of empty containers, increase capacity and accommodate increasing throughput, and improve access and manoeuvrability.

The WIFT precinct will continue to be Council's major focus for industrial development over the next 10 years, developing and implementing strategies to further capitalise on the facility's operations.

AERODROME

Horsham Aerodrome is a CASA registered aerodrome owned and operated by Horsham Rural City Council.

The Aerodrome is located approximately 6 kilometres from the central business district of Horsham.

The Aerodrome comprises a total area of approximately 50 hectares (area inclusive of privately owned facilities of Horsham Aviation Services) and is generally 'L' shaped to encompass the two runways.

The current operations at the Aerodrome include a range of aeronautical activities including general aviation, flying training, gliding activities, joy flights, regular air ambulance services, emergency support during major emergency events such as bushfires and floods, and some limited RAAF operations.

A draft Masterplan is currently underway for the Aerodrome. Initial recommendations consider long term opportunities to improve and upgrade the Aerodrome in terms of

extending the runway, utilities, aviation support facilities, painting and repairs, fuel, ground transport facilities and movement area facilities.

With potential upgrades and improvements to infrastructure and services at the Aerodrome, there is an opportunity to expand existing activities and operations. Similar to Mangalore Airport, the Horsham Aerodrome could support cadet pilot training, and capture cadets from existing airports that are at capacity, such as Moorabbin and Mangalore.

ACCESS TO ROAD AND RAIL

Horsham is well serviced for road and rail infrastructure, which could be further utilised for freight and passenger transport.

The Horsham township is located at the juncture of three major highways; The Western Highway, Wimmera Highway and Henty Highway. These highways provide vital links to Melbourne and Adelaide, as well as the regional cities of Ballarat and Bendigo.

The Wimmera Intermodal Freight Terminal (WIFT) located in Doon, transformed the efficient transportation of grain handling and storage in the Wimmera. With an increasing dependence on rail to transport grain, WIFT's role in the broader region is further affirmed. WIFT is a major drawcard for new agriculture businesses looking to establish in the Wimmera.

INDUSTRIAL LAND AVAILABILITY AND INFRASTRUCTURE REQUIREMENTS

There is ample industrial zoned land in the Council area, particularly in the Burnt Creek Industrial Estate to the south east, Enterprise Estate on Plumpton Road, and Golf Course Road to the south.

The Urban Development Program's (UDP) Regional Industrial Program concluded that there is adequate stock of zoned industrial land to meet historical trends of consumption, as well as accelerated rates of industrial land demand for 15+ years (as at 2011).

¹ WIFT Business Case, 2006

There is an opportunity to diversify the land parcels to suit a variety of businesses in terms of their land and infrastructure requirements.

Horsham is well positioned to attract industrial businesses that require larger land holdings. However, there is also an opportunity to provide smaller 'business' ready parcels.

HORSHAM REGIONAL LIVESTOCK EXCHANGE

Horsham Regional Livestock Exchange, located at Burnt Creek Industrial Estate since 1999, is the 4th largest sheep and lamb saleyards in Victoria with a throughput in the order of 500,000 sheep and lambs per year (437,035 in 2016-17).

Preparation of a Master Plan for the site is nearing completion. This Plan will guide future development of the site. Roofing the saleyards is a significant infrastructure priority for the Livestock Exchange with a projected cost of \$2.5 million. This project will add to Horsham's competitive advantage as a livestock exchange, in addition to providing a range of human and animal welfare benefits.

11.4. ECONOMIC INFRASTRUCTURE: STRATEGIES AND ACTIONS

STRATEGY 19 Lobby, advocate and attract funding for the delivery of priority infrastructure projects that will enable and encourage economic development			
Actions		Lead and Partners	Timeframe
ACTION 19.1	Lobby and advocate for passenger rail services from Melbourne to Horsham.	Technical Services / Planning & Economic Development / DEDJTR / WDA	Ongoing
ACTION 19.2	Advocate for a Horsham Bypass.	Technical Services / Planning & Economic Development / DEDJTR	Ongoing
ACTION 19.3	Complete the Horsham Aerodrome Master Plan.	Technical Services / Planning & Economic Development / DEDJTR	Medium term
ACTION 19.4	Advocate for upgrades to major roads and highways, including improved connections of these to Horsham's industrial areas.	Technical Services / Planning & Economic Development / DEDJTR	Ongoing
ACTION 19.5	Advocate for dual carriageway on the Western Highway.	Technical Services / Planning & Economic Development / DEDJTR / WDA	Ongoing
ACTION 19.6	Complete the Master Plan for the Horsham Regional Livestock Exchange, and lobby for support to develop a roof over the saleyards.	Technical Services	Short to medium term

STRATEGY 20 Ensure adequate delivery of land for employment to support industry growth

Actions	Lead and Partners	Timeframe
<p>ACTION 20.1 Commission the preparation of an Industrial Land Strategy, which includes the following:</p> <ul style="list-style-type: none">- Location of industrial zoned land;- Historical level of industrial land development activity;- Amount and location of available supply of industrial land (years of supply);- Assessment of the suitability of land;- Land and infrastructure requirements to attract investment.	Planning & Economic Development / Technical Services	Medium term
<p>ACTION 20.2 Advocate for staged development of the WIFT Precinct site over the next 5 years.</p>	Planning & Economic Development / Technical Services	Short to medium term

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