



cutting through complexity

SERDA: Economic Infrastructure Development Study

14th August 2015



<p>How has the south east region changed and what does it look like now? (Section 3)</p>	<p>The south east region has two parts - the more urban areas of Clarence and Sorell (that generally mirror the broader Tasmanian demographic), and the rural remote areas of Tasman and Glamorgan Spring Bay, that are generally older and more disadvantaged in terms of income, employment and opportunity. In recent years, the region has experienced significant growth in population (mainly in Sorell and Clarence) and in visitor numbers (mainly in Glamorgan Spring Bay and Tasman), such that the resident population is now up to 73,000, visitor numbers are around 300,000 and jobs are around 17,700.</p> <p>Only 27% of Sorell residents and 32% of Clarence residents also work in their ‘home region’, which contributes to expenditure leakage from the local economy.</p>
<p>What changes in the south east region are happening in the foreseeable future? (Section 4)</p>	<p>The south east region is also being shaped by a range of economic drivers:</p> <ul style="list-style-type: none"> ■ The airport runway extension, driving growth in visitor numbers, direct freight movements and Antarctic related activities ■ The expanding Cambridge Industrial Park & retail precinct catering for growth light industrial activities ■ The South East Irrigation Scheme 3 in the Coal River Valley/ Forcett, which is unlocking agriculture, viticulture and agri-tourism activities ■ 10-15 known significant tourism projects/ developments on the east coast, the Tasman Peninsula and Richmond <p>These economic drivers could collectively increase resident population up by 20,000 to 90,000; increase visitors up by 200,000 to 500,000 and, increase jobs in the region up by 2,000 to 20,000 over the next 10-15 years.</p>
<p>What are the issues/ potential implications of those changes on regional infrastructure? (Section 5)</p>	<p>Continued economic growth will further stretch key infrastructure networks – principally roads and transport. The Airport Master Plan forecasts an increase in daily vehicle trips from 8,400 today up to 27,300 by 2035. To a lesser extent, water and sewerage, energy, communications and social infrastructure are already presenting issues. Significant growth will further test health and education services that are generally fit for current requirements, but have limited capacity.</p> <p>Sorell is the epicentre for a range of economic activities and impacts. The future and function of Sorell, as a growing satellite of Hobart is a key consideration for the entire region going forward. The population in Sorell is projected to increase 40% from 13,407 now up to 18,841 (medium series) by 2036. Pressure points are manifesting by way of growing traffic through Sorell and on the main route from Sorell to Hobart. This will lead to increased travel times for freight, adverse safety outcomes and reduced resident and visitor amenity.</p> <p>Though not yet at breaking point, investment is needed to relieve emerging pressures on the region’s infrastructure networks.</p>
<p>Given what the region may become, what could be done to respond to the potential pressure points/ risks? (Section 6)</p>	<p>A range of potential responses have been identified – many of which need further investigation. These measures should be considered to support the region through the next phase of its growth. Determining the future form and function of Sorell, and to a lesser extent Cambridge is pivotal. The top three key measures include:</p> <ol style="list-style-type: none"> 1. Developing an Activity Centre Strategy for Sorell, that will define its vision/ purpose, its future form and functions, and guide commercial and residential development 2. Improving the attraction of public transport through Sorell and Cambridge (including the airport) 3. Investigating and prioritising longer term transport infrastructure plans that would include the airport round about, Cambridge by-pass and Richmond Road improvements as key priorities <p>Job creation in the region is also critical to easing the pressure on the transport networks. The airport and Coal River Valley ‘game changers’ are estimated to create/ support 650 new jobs alone. However, the region will need to identify more opportunities to support jobs and reduce travel and leakage from the region.</p>
<p>What else is needed in relation to some of the other economic development enablers? (Section 7)</p>	<p>Opportunities have also been identified to advance a number of other ‘non-infrastructure’ economic development initiatives. These include the need to continue to progress skilled labour force development (with a focus agriculture and tourism), improve lifestyle and health outcomes through economic development and preventative measures, and consider models of governance for SERDA, within the context of broader local government reform.</p>

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Important notice

Inherent Limitations

This report has been prepared as outlined in the Scope Section on page 3. The services provided in connection with this engagement comprise an advisory engagement which is not subject to assurance and other standards issued by the Australian Auditing and Assurance Standards Board, and consequently no opinions or conclusions intended to convey assurance have been expressed.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, WorkCover's management and personnel / stakeholders consulted as part of the process.

KPMG have indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

KPMG is under no obligation in any circumstance to update this report, in either oral or written form, for events occurring after the report has been issued in final form.

The findings in this report have been formed on the above basis.

Third Party Reliance

This report is solely for the purpose set out in the "Scope" section of this report and for SERDA's information, and is not to be used for any other purpose or distributed to any other party without KPMG's prior written consent.

This report has been prepared at the request of SERDA in accordance with the terms of the contract with Sorell Council. Other than our responsibility to SERDA, neither KPMG nor any member or employee of KPMG undertakes responsibility arising in any way from reliance placed by a third party on this report. Any reliance placed is that party's sole responsibility.

1. Executive Summary

Key findings

Recommendations

Question	Answers
<p>How has the south east region changed and what does it look like now?</p> <p>(Section 3)</p>	<ul style="list-style-type: none"> ■ The south east region has undergone a significant period of change and growth over the last 5-10 years: <ul style="list-style-type: none"> – Population has grown to 73,360 (20,279 excluding Clarence) and over the last five years Sorell and Clarence have grown at a compound annual growth rate of 1.27% and 0.86% pa, much faster than the Tasmanian average of 0.41% pa. – Visitor numbers are up to 314,000 (East Coast) and have grown at 16% in the last year alone – Housing values have grown at 3.3% since 2011, compared with 2.8% for Hobart. This growth has been mainly driven by Sorell, which has grown 5.9% since 2011 ■ The region has been undergoing continuing change in its industry and employment profile. Overall, net jobs lost in the Manufacturing (-97) was the most significant. The most jobs added occurred in the Education and Training sector (483). ■ Some of the key emerging challenges for the region relate to: <ul style="list-style-type: none"> – the older age profile, particularly in the rural regions – the low capacity for Sorell & Clarence to meet local resident employment needs. Only 27% of Sorell and 32% of Clarence residents also work in the region. – a higher reliance on motor vehicles for transport to work – the primary method of travel is car for 80% in Sorell and Clarence, compared to the Tasmanian average of 75%. By comparison, only 56% of Hobart residents drive a car to work. ■ In many ways, Sorell and Clarence are similar to the Tasmanian averages, while Tasman and GSB have some differences that generally point to higher levels of economic disadvantage.
<p>What changes in the south east region are happening in the foreseeable future?</p> <p>(Section 4)</p>	<ul style="list-style-type: none"> ■ Population projections out to 2036 (using the medium series), point to an increase of 14,620 for the south east council areas - a 9.7% increase for Tasman (227); a 9.3% decrease for Glamorgan Spring Bay (-410); a 40.5% increase for Sorell (5,434), and a 17.7% increase (9,369) for Clarence. ■ Visitor numbers to Tasmania are anticipated to increase by 500,000 to 1.5M by 2020. If the south east region maintains its 1/3 share, an increase of 150,000 - 200,000 visitors would be not unreasonable. Airport passenger movement forecasts may see visitors to Tasmania (holidays or visiting friends & relatives) increase to 2.3M by 2035. ■ Growth in passenger, freight, employee and logistics trips through Hobart Airport are forecast to increase from 8,400 per day now to 27,300 per day by 2035 ■ At a more granular level, this study has learnt of a range of potential projects that will impact the region in years to come: <ul style="list-style-type: none"> – The 'game changers' – Hobart Airport, South East and Swan Valley irrigation schemes, and Antarctic support services – Projects and initiatives in the strategic growth sectors of tourism and recreation e.g. Solis, Spring Bay, Port Arthur etc. – Projects by major employers in the strategic growth sectors of agriculture and aquaculture e.g. Tassal, Houston's and Inghams – Projects in the more traditional sectors of construction, manufacturing, wholesale and retail e.g. Copping C-Cell, expansion through the Cambridge Industrial Estate, retail expansion around the airport ■ Using a 'bottom up' estimation, the combined impact of the foreseeable projects that will drive economic growth in the region over the next 10-15 years may amount to an increase in the resident population of up to 2,000; an increase in employment of up to 1,800 jobs, an increase in visitors to the region of 170,000 – 250,000 per annum; and capital expenditure of between \$250M - \$600M. ■ These 'bottom up' projects, reconciled with the 'top' down' higher level population and visitor projections suggest that the resident population in the south east region could grow from around 73,000 to 90,000; visitors could grow from 300,000 to 500,000, and; jobs could grow from 17,700 to 20,000 over the next 10-15 years

Question	Summary observations
<p>What are the issues/ potential implications of those changes on regional infrastructure? (Section 5)</p>	<ul style="list-style-type: none"> ■ Consultation/ qualitative analysis highlighted the following key infrastructure issues: <ul style="list-style-type: none"> – <i>Roads and transport infrastructure</i> - this may be an impediment to longer term growth of tourism and agriculture, especially where those industries ‘collide’, creating further congestion, longer travel times, reduced safety and amenity – <i>Water and waste water infrastructure</i> – TasWater has forward capital works plans in place, but issues remain for some participants in the tourism, agriculture and aquaculture strategic growth sectors. On site services in the southern beaches could limit growth in that area – <i>Energy infrastructure</i> – TasNetworks has forward capital works plans in place, but energy (demand for natural gas & some reliability issues) may be an impediment to some participants in construction/ manufacturing around the Cambridge Industrial Park – <i>Communications infrastructure</i> – such as inadequate internet connection, mobile phone black spots is an impediment to some participants (and visitors) in the tourism, agriculture and aquaculture strategic growth sectors, particularly in remote regions – <i>Social infrastructure</i> – such as visitor and resident focussed facilities (toilet amenities, car parking, boat ramps and jetties etc.), along with some elements of the existing education infrastructure, particularly around challenges with Sorell High School (under supported) and Cambridge Primary (over supported) and the demands for pre-school and after-school child care in the region ■ In terms of infrastructure strengths, the region is well served by <i>irrigation, the airport, residential land and commercial/ industrial land</i>, and these strengths should be leveraged. However, there are risks that strengths will also add to pressures in other infrastructure networks. ■ The region is also generally well served in terms of <i>other education and health related infrastructure</i>, but there is still scope for further improvement in outcomes in these sectors, though not necessarily through investment in infrastructure.
<p>Given what the region may become, what could be done to respond to the potential pressure points/ risks? (Section 6)</p>	<ul style="list-style-type: none"> ■ A range of potential responses have been identified – many of which need further investigation – that could support the region through the next phase of its growth. ■ Determining the future form and function of Sorell, and to a lesser extent Cambridge is pivotal. Many of the recommendation aim to minimise the leakage of economic activity out of Sorell, increase job containment in Sorell and reduce congestion on roads out of Sorell. ■ Job creation in the region is critical to easing the pressure points. The project drivers will create employment opportunities. However, in planning its longer term future, the region (and Sorell in particular) will need to identify more opportunities to support jobs in the region and reduce travel from the region. ■ The recommendations, set out below, focus on the shorter term actions that SERDA should continue to progress. Section 6 provides more detailed guidance into the prioritisation and sequencing of the range of potential responses over a 10 year time frame.
<p>What else may need to be done in relation to some of the other economic development enablers? (Section 7)</p>	<ul style="list-style-type: none"> ■ The study also identified opportunities to advance a number of other ‘non-infrastructure’ economic development enablers. These are not within the scope of this study, but include the need to: <ul style="list-style-type: none"> – continue to progress skilled labour force development (with a focus agriculture, tourism, hospitality and aged care), – improve lifestyle and health outcomes through economic development and preventative measures, and – consider models of governance for SERDA, within the context of broader local government reform.

Given what the region may become, what could be done to respond to the potential pressure points/ risks?		Refer Page #
Roads and transport	<ol style="list-style-type: none"> Investigate opportunities to improve Sorell/ Cambridge public transport services, having regard to the review of current public transport contracts from 2016-17 (to take effect from 2018) <ol style="list-style-type: none"> Investigate opportunities to improve on current services levels i.e. scheduling, frequency of service, express etc. Investigate opportunities to construct bus lanes through key congestion points on the Tasman Highway Improve utilisation of park and ride infrastructure, shelters, modify kerb and gutter etc. as required Continue to investigate opportunities undertake upgrades to the Arthur Highway through to Port Arthur and surrounds as necessary Investigate the feasibility of undertaking gravel road upgrades to key visitor sites <ol style="list-style-type: none"> Three Capes Track The Coal Mines Investigate the feasibility of new/ upgraded road infrastructure as part of the State's 10 year Roads Infrastructure Plan due in 2016 at key points/ routes in the south-east region: <ol style="list-style-type: none"> The Airport round about Cambridge by-pass The Richmond Road from Cambridge to Richmond Sorell by-pass (to south-west) Sorell By-pass (to north east) 	47-48
Water and sewerage	<ol style="list-style-type: none"> Investigate demand and potential improvements to water and waste water services at the Port Arthur Historic Site and the Coal Mines, including the possibility for these services to be managed by TasWater Consider options for irrigation schemes currently owned and operated by TasWater to be transferred to Tas Irrigation for the ongoing management of irrigation schemes. Monitor the adequacy and supply of water and waste water services to major private sector employers in the south east region, including but not limited to Houston Farms, Ingham and TASSAL Factor planning for the southern beaches water and sewerage systems in TasWater's longer term strategic asset management plans 	49
Energy and communications	<ol style="list-style-type: none"> Investigate options for the provision of gas supply to the eastern shore including Rosny Park, Mornington Industrial Estate and Cambridge Industrial Park. Undertake upgrades to address communication black spot issues in Tasman and Glamorgan Spring Bay. 	50

Given what the region may become, what could be done to respond to the potential pressure points/ risks?		Refer Page #
Social infrastructure	<ol style="list-style-type: none"> 1. Coordinate the objectives and plans of Sorell and Clarence in relation to proposals for regional sporting facilities at Pembroke Park and Seven Mile beach 2. Continue to develop public/ social infrastructure to support growing visitor demands in townships. This would include, but not be limited to: <ol style="list-style-type: none"> i. Infrastructure to facilitate cruise ship visits to Spring Bay ii. improved streetscapes, gardens, tree plantings, foot paths etc. to be more appealing to visitors iii. Improved visitor centres with new branding and improved services at Triabunna, Swansea, Bicheno and Freycinet iv. Upgrades/ replacements of jetties, boat ramps etc. and improved supporting amenities such as parking, toilet facilities, fish cleaning areas v. Improved public amenities such as 'loos with views', baby changing facilities etc. vi. Improved and more coordinated/ cohesive signage 3. Continue to liaise with DOE to advocate for changes that are beneficial to the region <ol style="list-style-type: none"> i. Explore options to improve the perception and performance of the Sorell High School ii. Investigate the option of the extending Sorell High School to years 11/12 iii. Understand the rationale behind DOE projections that, it is claimed, would have Sorell with no change to the potential student numbers for 10 years iv. Investigate options to rebalance student numbers between in-zone and out-of-zone schools that are having adverse impacts on schools such as Cambridge Primary School v. Investigate pre-school and after school care options at schools and in the community more generally 	51-52
Commercial/ industrial land/ airport	<ol style="list-style-type: none"> 1. Continue to investigate demand for additional Infrastructure on appropriate commercial/ industrial land to support <ol style="list-style-type: none"> i. Expanded growth in direct freight through Hobart Airport e.g. cool stores, quarantine facilities etc. ii. Expanded services relating to Antarctica e.g. quarantine facilities, storage etc. 	53
Residential/ housing	<ol style="list-style-type: none"> 1. Develop a Sorell Activity Centre Strategy 2. Continue to progress Sorell's residential development, but with regard to consequential impacts on regional infrastructure pressure points, notably traffic impacts, and other regional settlement plans 3. Develop and implement the Cambridge Master Plan (including potential by-pass) 4. Continue to progress the development of the Triabunna Marina Views Estate and the urban redesign at Triabunna 	53-54

What else may need to be done in relation to some of the other economic development enablers? (Section 7)		Refer Page #
Skilled labour force	<ul style="list-style-type: none"> i. Liaise with DOE and other stakeholders to advocate for changes that are beneficial to the region ii. Develop programs that will improve literacy levels and business skills for people in the agricultural industry iii. Develop programs that will improve skills and customer service standards in the tourism and hospitality sector iv. Develop improved approaches to optimising VET and DOE program to continue to increase participation in Trade Training Centres, since these centres are new with good facilities, but are currently under utilised 	58
Lifestyle/ health	<ul style="list-style-type: none"> 1. Continue to work closely with the new Primary Health Network provider, TasPHN to effect change in the determinants of health – 80% of which have no dependence on health infrastructure (physical environment 10%, socio-economic factors 40%, health behaviours 30%) and only 20% relate to access to health care 2. Ensure all health support services – GP's, multi-purpose centres etc. – remain appropriately accessible and scaled to deal with the foreseeable growth in economic activity driven by an expanding population, visitors and jobs, guided by a target of 1 GP per 1,000 resident population 	59
Governance	<ul style="list-style-type: none"> 1. Consider options to establish a more formalised governance model for SERDA, including the need for a dedicated regional resource to advance economic development initiatives on a broader regional scale. This needs to be considered within the current context of local government reform. 	60

2. Introduction

Scope

Approach

Analytical framework

Scope

The South East Regional Development Association (“SERDA”), has engaged KPMG to assist them in preparing a 10 year regional economic infrastructure strategy that:

- considers existing economic infrastructure opportunities that have been identified, including:
 - the South East Irrigation Scheme
 - the Hobart Airport expansion, growth in tourism in Tasmania
 - agriculture and aquaculture expansion
 - waste management consolidation
 - residential development, and
 - other commercial and industry development
- identifies the **supporting infrastructure for these opportunities**, including transport, off site handling, processing and storage (particularly the SEIS);
- takes into account the **key demographic and economic modelling** that will underpin these growth requirements and supporting services; and
- provides an **overall framework of staging**, responsibility and economic feasibility for infrastructure provision.

The strategy aims to establish an evidence-based decision making framework, for the consideration and development of these infrastructure opportunities. This will reflect the following objectives:

- ensuring resilience and coordination across the region when it comes to investment;
- realising the region’s ability to contribute to economic growth; and
- increasing the quality of life for the region.

This framework will be **used for State and Local Government to maximise the use of existing assets, and enable targeted investment into new infrastructure to accelerate economic performance, and encourage private investment in the region**. The study will also provide conclusions around infrastructure and growth scenarios. The framework will include a cost-benefit analysis of recommended infrastructure types and their provision, and will focus on a 10-year implementation plan that considers staging and other risk factors and considerations. It is to consider:

- **sectoral analysis**, including roads, ports, airport, energy, telecommunications, water (including potable water), irrigation, sewerage, land availability and education and health needs forecasts.
- review **regulatory issues** and requirements
- explore **infrastructure financing** options
- economic and **demographic growth** projections and trends

Approach and report structure

The study has been undertaken over a 7 week timeframe in four main phases. Each phase was structured to address a key question. The answers to the questions posed are found in each section of the report as indicated below

Report Structure			
Phases	Key question	Approach	Section
Background Research	How has the SE Region changed and what does it look like now?	Obtain and analyse a wide range of social, economic and demographic data	3
Drivers of change	What changes in the SE region are happening in the foreseeable future?	Consult with key stakeholders, consider and other demographic projections and other research and studies Identify key drivers of change in the region	4
Issues identification	What are the potential implications of those changes on regional infrastructure?	Consult with key stakeholders Identify issues and barriers to development in the region	5
Strategy/ response development	In light of the indications of what the region may become, what could be done to respond to the potential pressure points/ risks?	Consult with key stakeholders, consider other research and studies Identify key infrastructure responses to change in the region Identify any other non-infrastructure responses	6 7

Sustainable Social and Economic Development

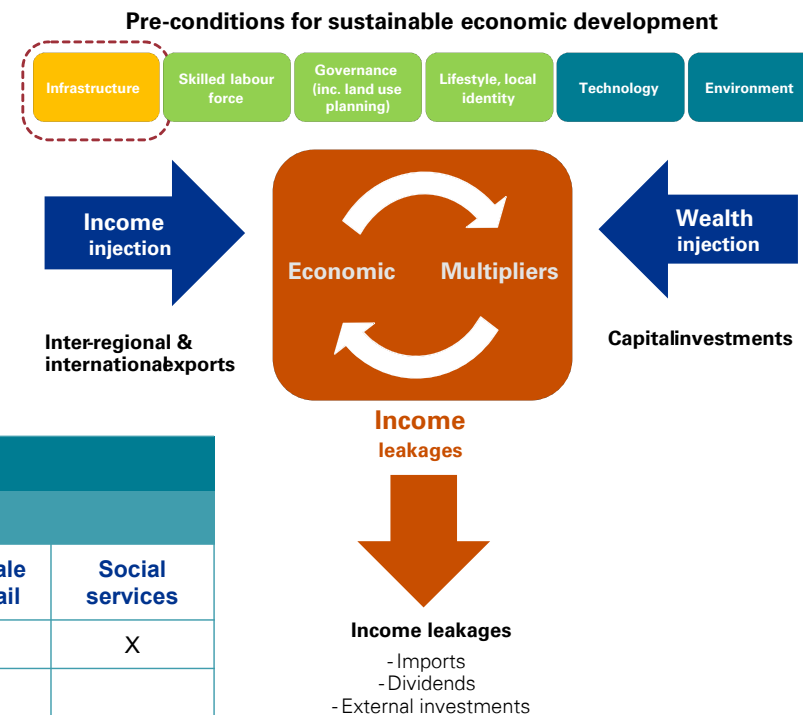
KPMG's approach centres around a simplified model of a local economy, (shown right). **The boxes along the top of the model represent preconditions or 'enablers' for social and economic development.** The key to maximising regional social and economic development opportunities include:

- strengthening and leveraging existing industries to maximise export opportunities;
- attracting new investments and export industries; and
- strengthening local industry supply chains to minimise income leakages through imports (i.e. Import replacement).

This project for SERDA **is focussing on the infrastructure enabler.** The other enablers are not in scope but may give rise to observations, to the extent these impact on the region's development.

The Steering Committee has signed off on the enablers, strategy focus areas and key sectors that will be the focus for this study. Projects, initiatives and strategies have been developed in respect to each of these areas where appropriate. Crosses illustrate where projects, issues and potential responses have emerged.

Analytical Framework								
Enablers		Sector Focus Areas						
		Tourism	Agriculture	Aquaculture	Antarctic support	Construction/ manufacturing	Wholesale and retail	Social services
Infrastructure	Water and waste water	X	X	X				X
	Irrigation	X	X					
	Energy	X	X	X		X	X	X
	Roads/ transport	X						
	Airport	X	X	X	X		X	
	Housing/ accommodation							X
	Communications	X	X	X		X	X	X
	Social infrastructure							X



3. South east socio-economic profile

How has the south east region changed and what does it look like now?

How has the SE Region changed and what does it look like now?

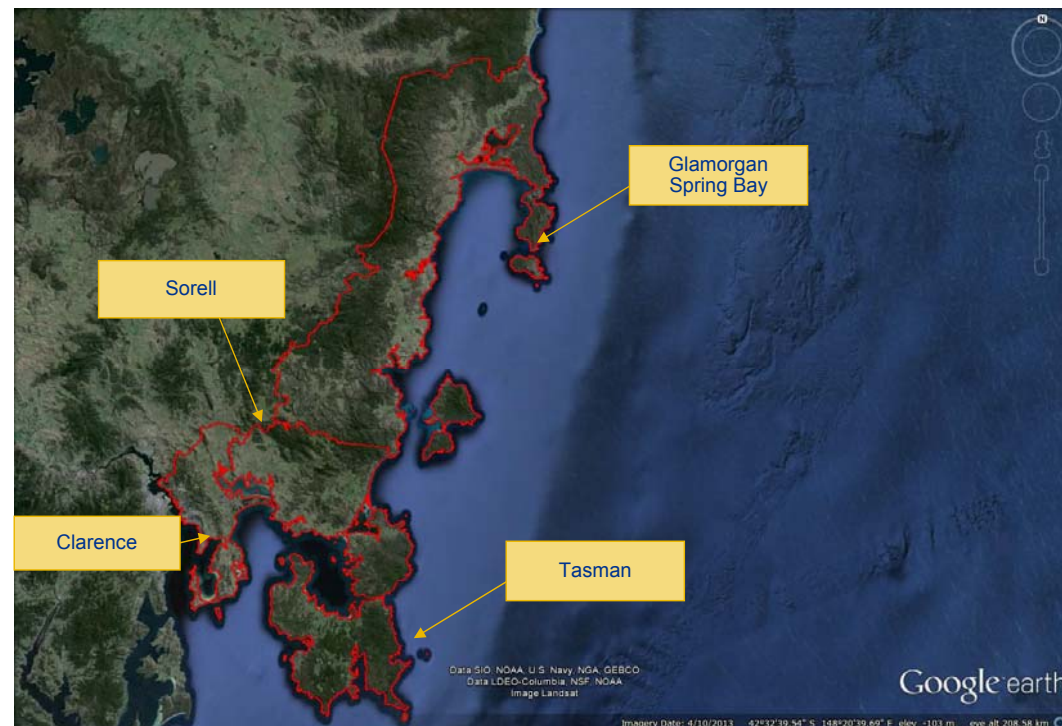
This section provides a high level analysis of the recent past to current day social and economic profile of the south-east region. The factors that have been analysed and documented in this section include:

- Population
- Income and unemployment
- Occupation and industries
- Work travel patterns
- Housing profile
- Building approvals

Specific analysis has been undertaken into the two major industry sectors in the region:

- Agriculture
- Tourism

Further analysis is shown in Appendix A.



The SERDA group of councils occupies an area of 4,214 sqm, which represents approximately 6% of Tasmania's area. The region comprises more highly urbanised areas of Clarence and Sorell and the more rural areas of Tasman and Glamorgan Spring Bay.

The region's population represents approximately 17% of Tasmania's total population. Population densities vary significantly from the Tasmanian average of 7 persons per square

kilometre:
 Clarence – 140
 Sorell – 23
 Tasman – 4
 Glamorgan Spring Bay – 2

The region has extensive areas of farming and grazing land and an expansive coastline and resources to support a growing aquaculture industry.

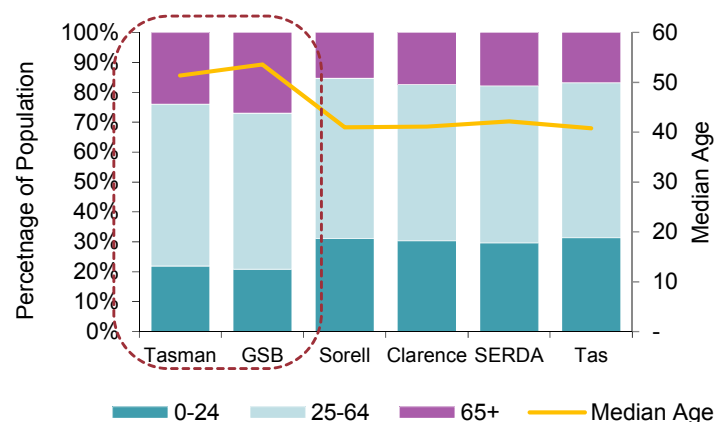
The South-East Tasmanian region comprises approximately of 17% of Tasmania's population.

In comparison to state-wide population data, there is proportionately less younger people and more people of retirement age living in these areas. This is reflected in the comparison of median ages across the regions.

This is predominately driven by the different age profile in the Tasman and Glamorgan – Spring Bay regions. Sorell and Clarence are closely aligned to the average Tasmanian age profile.

Overall the population of the SERDA region is growing faster than the Tasmanian average. This is driven by Sorell and Clarence which has consistently been above the Tasmanian average over the last five years. GSB and the Tasman council have had some years of negative growth.

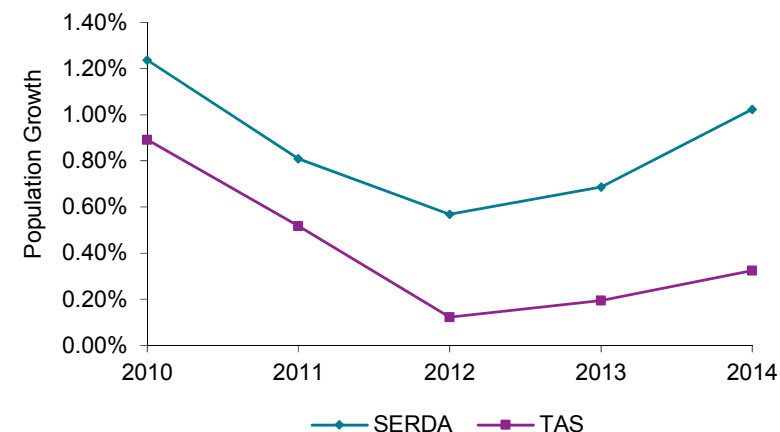
Population by Region 2014



Population Summary	Tasman	GSB	Sorell	Clarence	SERDA	Tas
Age summary						
0-24	21.9%	20.9%	31.1%	30.4%	29.7%	31.4%
25-64	54.2%	52.1%	53.6%	52.2%	52.5%	51.8%
65+	23.8%	27.0%	15.4%	17.4%	17.8%	16.8%
Median Age	51.4	53.6	41.0	41.1	42.2	40.8
Total Population	2,440	4,432	13,407	53,081	73,360	512,333

ABS National regional profile by LGA (2012)

Population Growth Rates (2010-2014)



Population Growth	Tasman	GSB	Sorell	Clarence	SERDA	TAS
2010	1.33%	-0.31%	1.82%	1.22%	1.24%	0.89%
2011	0.45%	-0.67%	1.34%	0.82%	0.81%	0.52%
2012	-0.12%	0.23%	0.85%	0.56%	0.57%	0.12%
2013	-3.16%	0.07%	1.10%	0.81%	0.69%	0.19%
2014	1.48%	1.35%	1.26%	0.92%	1.02%	0.32%
5 year Growth	-0.08%	0.65%	6.53%	4.39%	4.40%	2.06%

ABS Regional Population Growth, Australia, 2013-14 (cat. no. 3218.0)

South-East socio-economic profile

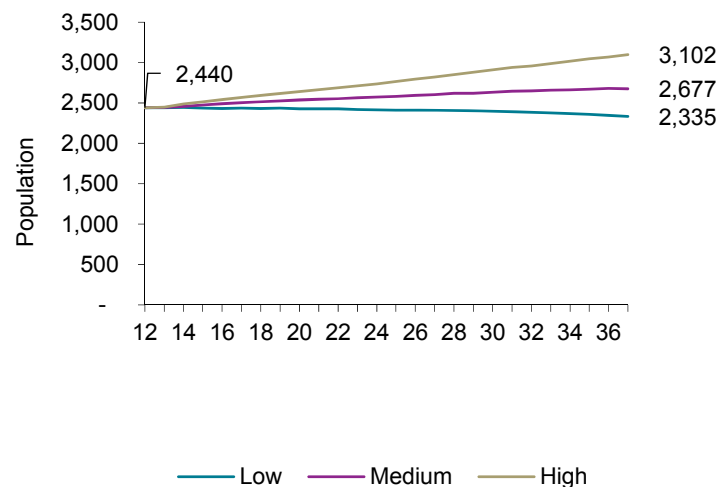
Population projections

Population projections out to 2036 for the south east councils (using the medium series), point to:

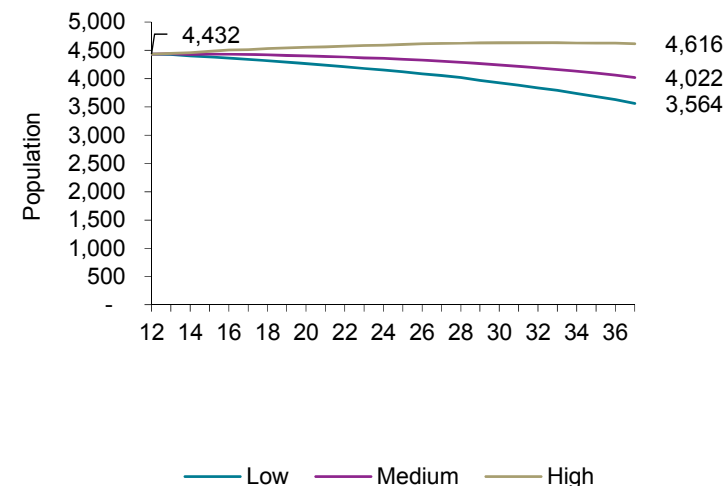
- A 9.7% increase for Tasman (227)
- A 9.3% decrease for Glamorgan Spring Bay (-410)
- A 40.5% increase for Sorell (5,434)
- A 17.7 (9,369) increase for Clarence.

Combined, this would amount to an increase in population of 14,620 for the south east region.

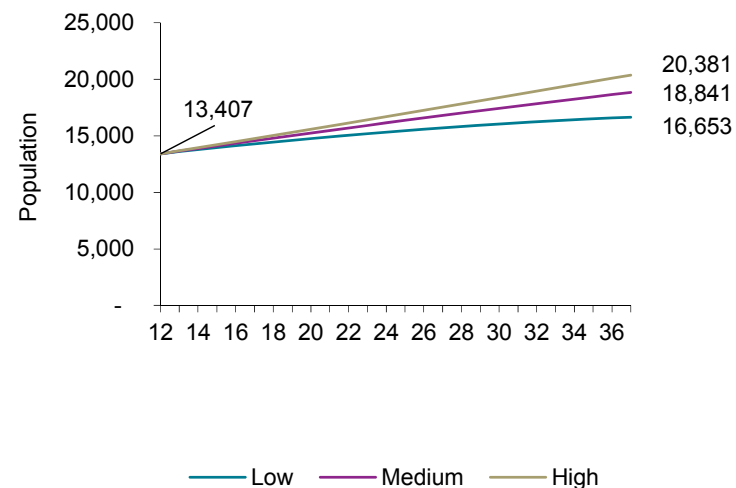
Population Projection: Tasman



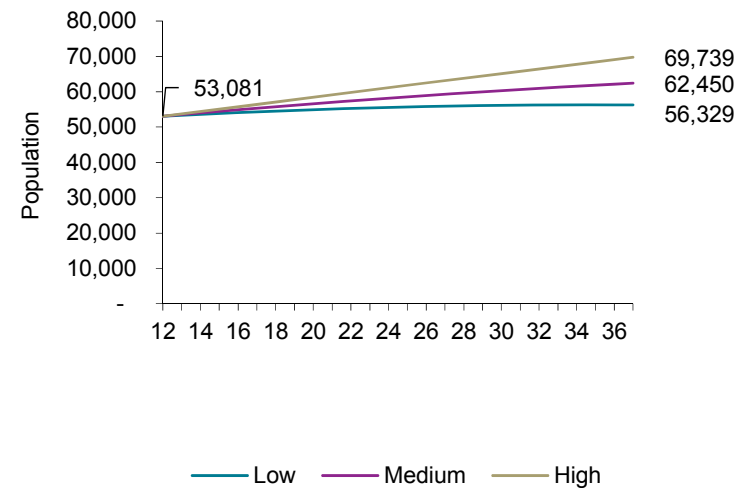
Population Projection: GSB



Population Projection: Sorell



Population Projection: Clarence



Average salaries for the SERDA region are slightly higher than Tasmania as a whole. This is largely because of Clarence which contributes a large portion of the weighted average.

The individual councils vary considerably with the Tasman and GSB reporting average wages up to 20% less than Sorell, Clarence and the Tasmanian average.

The employment profile indicates that comparatively to other Tasmanian regions, the South-East region has:

- the smallest working age population in Tasmania (25,200)
- the lowest employment rate (66.3%)
- the highest unemployment rate (7.7%)
- highest youth unemployment rate at (21.5%)

Average Wage by Occupation by Region

Region	Managers	Professionals	Technicians and Trades	Community and Personal Service	Clerical and Administrative	Sales	Machinery Operators	Labourers	Not Stated	Average
Tasman	32,600	44,000	34,700	24,000	29,300	14,600	23,000	21,300	16,300	39,300
GSB	49,700	59,700	51,300	32,000	36,700	27,100	64,600	30,600	30,900	42,300
Sorell	64,900	64,000	51,600	39,300	46,300	28,900	46,800	35,900	32,300	47,300
Clarence	75,400	69,600	56,600	42,800	48,000	31,200	46,700	33,000	39,900	52,800
SERDA	71,800	68,100	54,800	40,900	47,100	30,400	47,700	32,700	37,200	50,900
Tasmania	69,200	69,500	55,300	36,700	45,700	29,900	53,600	35,100	35,100	49,500

4A: Wage and Salary Earners, Occupation (Major Groups) by Age, Local Government Areas, 2011 with Wages updated as per Average Weekly Earnings, Tasmania (Dollars) - Trend

Occupation of Employed Person by Region

Region	Managers	Professionals	Technicians and Trades	Community and Personal Service	Clerical and Administrative	Sales	Machinery Operators	Labourers	Not Stated	Total
Tasman	7%	15%	10%	16%	9%	5%	5%	25%	8%	800
GSB	12%	12%	11%	12%	9%	7%	8%	22%	8%	1,557
Sorell	10%	12%	14%	13%	17%	10%	6%	12%	7%	5,904
Clarence	12%	20%	11%	11%	18%	9%	4%	8%	7%	24,029
SERDA	11%	18%	12%	12%	17%	9%	4%	10%	7%	32,290
Tasmania	9%	18%	12%	11%	14%	9%	6%	13%	6%	219,541

4A: Wage and Salary Earners, Occupation (Major Groups) by Age, Local Government Areas, 2011

Labour Force Profile by Region

Region	Working Age Pop (15-64)	Employment Rate (15-64)	Participation Rate (15+)	Unemployment Rate (15+)	Youth Unemployment (15-24)
Hobart	142,700	70.7%	63.2%	6.9%	17.0%
Launceston and NE	89,200	69.5%	58.8%	6.3%	17.8%
West and NW	71,000	71.1%	60.7%	7.3%	17.4%
South East	25,200	66.3%	61.8%	7.7%	21.5%
Tasmania	328,000	70.1%	61.0%	7.3%	17.6%

ABS Labour Force Survey, 2015

Please note the South East region contains councils other than those that are the target of this report and provides an indication of the level of the current labour force for GSB and Tasman. While Hobart includes Clarence and the Sorell township and provides an indication of their current labour force

South-East socio-economic profile

Occupation and industry profile

Clarence and Sorell regions showed they are closely correlated to the Tasmanian average jobs by industry experiencing only minor differences in Public Administration and Safety (smaller proportion), and Retail, and Education and Training (greater proportion).

On the other hand Tasman and GSB have several notable differences. There are a smaller proportion of jobs in the Public Administration and Safety, Health Care, and Retail Trade industries and a significantly greater proportion of jobs in the Agriculture and Fishing, Arts and Recreation, and Accommodation and Food Services industries.

Changes in employment between the Census in 2005 and 2011 are presented in Appendix A

% Employment by Industry by Region (2011)

	Tasman	GSB	Sorell	Clarence	SERDA	Tas
Retail	4.8%	11.2%	18.5%	15.7%	15.3%	12.1%
Education and Training	7.1%	5.8%	8.7%	13.1%	11.7%	9.6%
Health Care	8.8%	8.1%	11.3%	11.2%	10.8%	12.5%
Accommodation	17.7%	24.1%	9.8%	6.5%	8.7%	7.5%
Construction	5.4%	5.6%	7.8%	8.6%	8.2%	6.1%
Public Admin & Safety	5.4%	5.4%	5.4%	8.9%	8.0%	9.6%
Manufacturing	4.6%	7.2%	11.6%	5.8%	6.6%	9.1%
Agriculture and Fishing	17.4%	14.2%	6.2%	2.5%	4.4%	4.1%
Transport	3.5%	3.4%	3.9%	4.5%	4.3%	4.1%
Scientific and Technical	1.4%	2.0%	3.2%	4.7%	4.2%	5.0%
Other Services	0.9%	1.9%	3.4%	3.8%	3.5%	3.9%
Utility Services	0.0%	1.0%	0.9%	3.5%	2.9%	1.7%
Wholesale	1.5%	1.9%	2.6%	2.5%	2.4%	3.4%
Arts & Recreation	16.4%	1.9%	0.8%	1.9%	2.3%	1.7%
Real estate	0.0%	1.1%	2.2%	2.2%	2.0%	1.4%
Administrative	3.5%	1.8%	1.5%	1.7%	1.7%	2.3%
Financial Services	0.0%	1.1%	1.1%	1.9%	1.6%	2.6%
Information & Media	0.9%	0.7%	0.8%	0.6%	0.7%	1.6%
Mining	0.8%	0.6%	0.2%	0.2%	0.2%	1.0%
Forestry and Logging	0.0%	1.0%	0.2%	0.0%	0.1%	0.5%

ABS National regional profile by LGA (2012)

Government Support as Percentage of Population

	Tasman	GSB	Sorell	Clarence	SERDA	Tas
Pension	20%	21%	13%	2%	6%	14%
Newstart	4%	4%	3%	3%	3%	4%
Youth Allowance	8%	7%	1%	1%	2%	2%
Carer/ Disability	13%	8%	8%	18%	16%	7%
Parenting	1%	1%	2%	2%	2%	2%
Total	46%	41%	28%	26%	28%	28%

ABS National regional profile by LGA (2012)

Largest Differences to the Tasmanian Average

	Tasman	GSB	Sorell	Clarence
Retail	-7.3%		6.4%	3.7%
Education and Training		-3.8%		3.5%
Health Care	-3.8%	-4.4%		
Accommodation	10.1%	16.6%		
Construction				
Public Admin & Safety	-4.3%	-4.3%	-4.3%	
Manufacturing	-4.5%			
Agriculture and Fishing	13.3%	10.1%		
Transport				
Scientific and Technical				
Other Services				
Utility Services				
Wholesale				
Arts & Recreation	14.7%			
Real estate				
Administrative				
Financial Services				
Information & Media				
Mining				
Forestry and Logging				

Government support varies across each of the regions as well as in comparison with the state as a whole.

The population in the Tasman and GSB regions are more reliant on Government Payments than Sorell and Clarence who report similar levels of support as the Tasmanian Average.

The higher support requirements in Tasman and GSB regions is largely driven by higher rates of pensioners and youth allowance recipients. It should be noted that Clarence's pension percentage of just 2% is very low.

Newstart and Parenting support levels are relatively similar across all areas however, Carer and Disability Payments are markedly higher in the SERDA region than the Tasmanian average. This is driven by a much higher than average percentage in the Clarence region.

This chart points to the areas of growth, relative specialisation and number of jobs in the SERDA region.

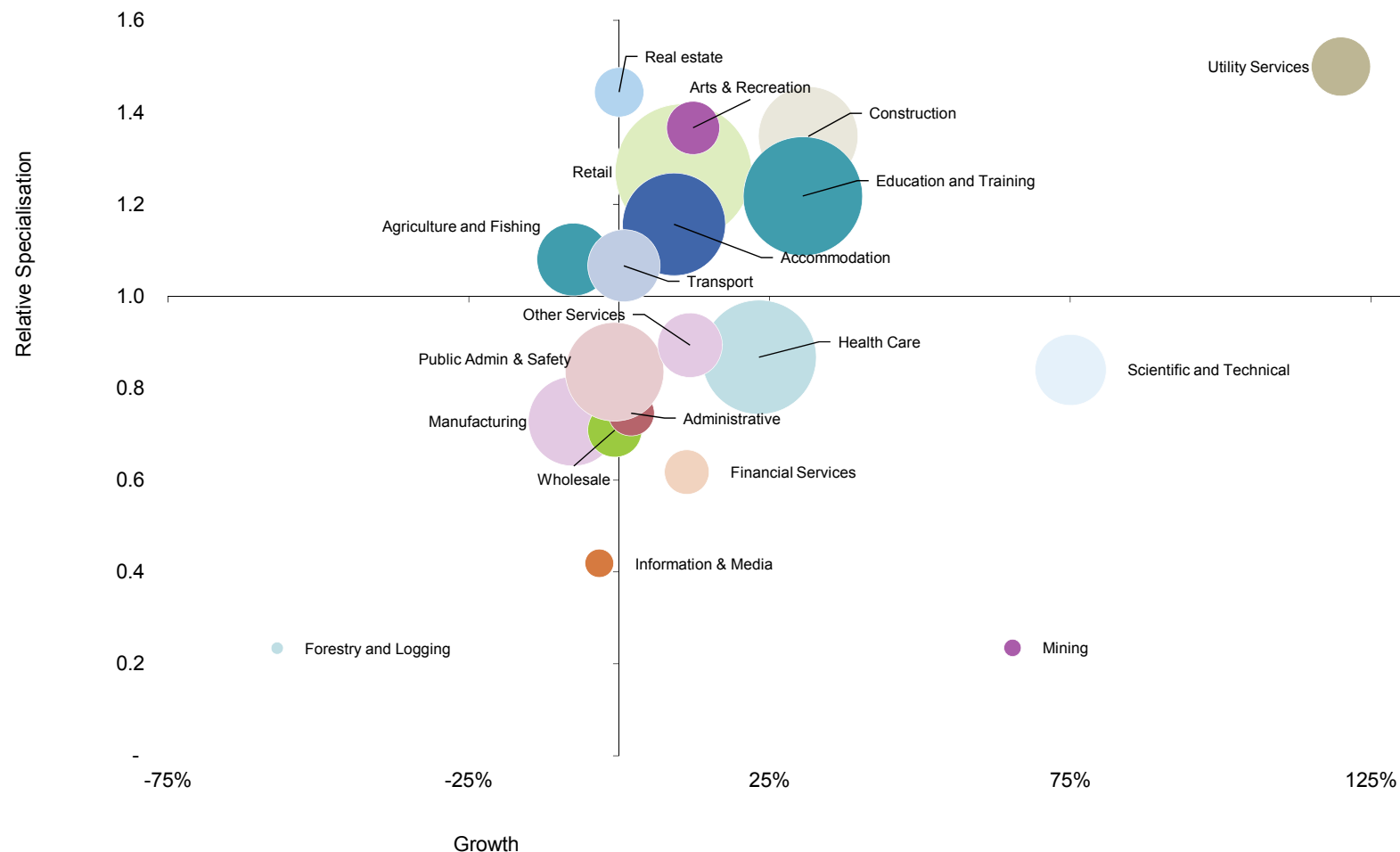
The chart can be summarised as follows:

- **Relative specialisation on the Y Axis** measures how specialised the industry is in the region compared to Tasmania as a whole. A score above 1 means that that industry employs proportionately more people in that industry than the Tasmanian average.
- **Growth on the X Axis** shows how much that particular industry has grown between the two points in time.
- **The size of the bubbles** represents the number of jobs in that particular industry for the region.

For SERDA there are a large number of industries represented in the top right of the chart demonstrating strong growth and relative specialisation. The highest employing of these industries are education and training, and retail.

More detailed charts for each region can be found in Appendix A.

SERDA: Industry Growth Share Matrix

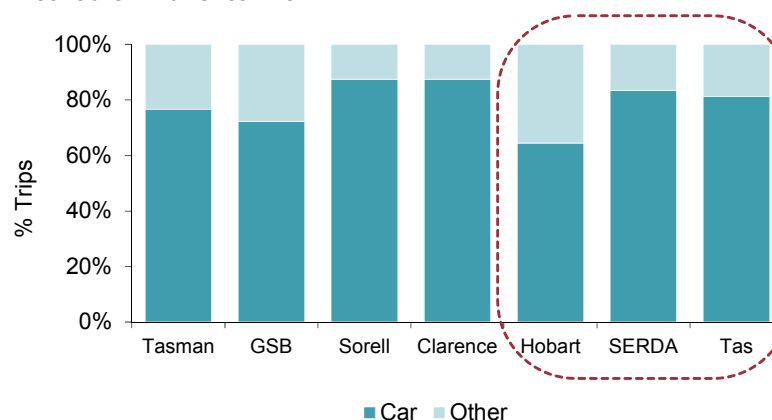


ABS National regional profile by LGA (2007 & 2012)

This work travel analysis shows:

- The primary method of travelling to work in the South-East region was by car (75%), which was greater than the Tasmanian average of 73%. This was primarily driven by Sorell and Clarence.
- There are less people walking to work (3%) in the South East region, than the Hobart or Tasmanian average (5%).
- A greater proportion of people work from home in Tasman and Glamorgan Spring Bay (11% and 12% respectively), compared to the Hobart and Tasmanian average of 5%.

Method of Travel to Work



Method of Travel to Work							
	Tasman	GSB	Sorell	Clarence	Hobart	SERDA	Tas
Car, as driver	70%	66%	80%	80%	56%	75%	73%
Car, as passenger	7%	6%	8%	8%	8%	8%	8%
Walked only	7%	11%	2%	2%	18%	3%	6%
Bus	1%	0%	1%	1%	6%	5%	3%
Bicycle	0%	1%	0%	0%	2%	1%	1%
Motorbike/scooter	0%	0%	0%	0%	1%	0%	1%
Combination	0%	0%	1%	1%	1%	1%	1%
Worked at home	11%	12%	5%	5%	5%	5%	5%
Other	4%	4%	3%	3%	3%	3%	3%

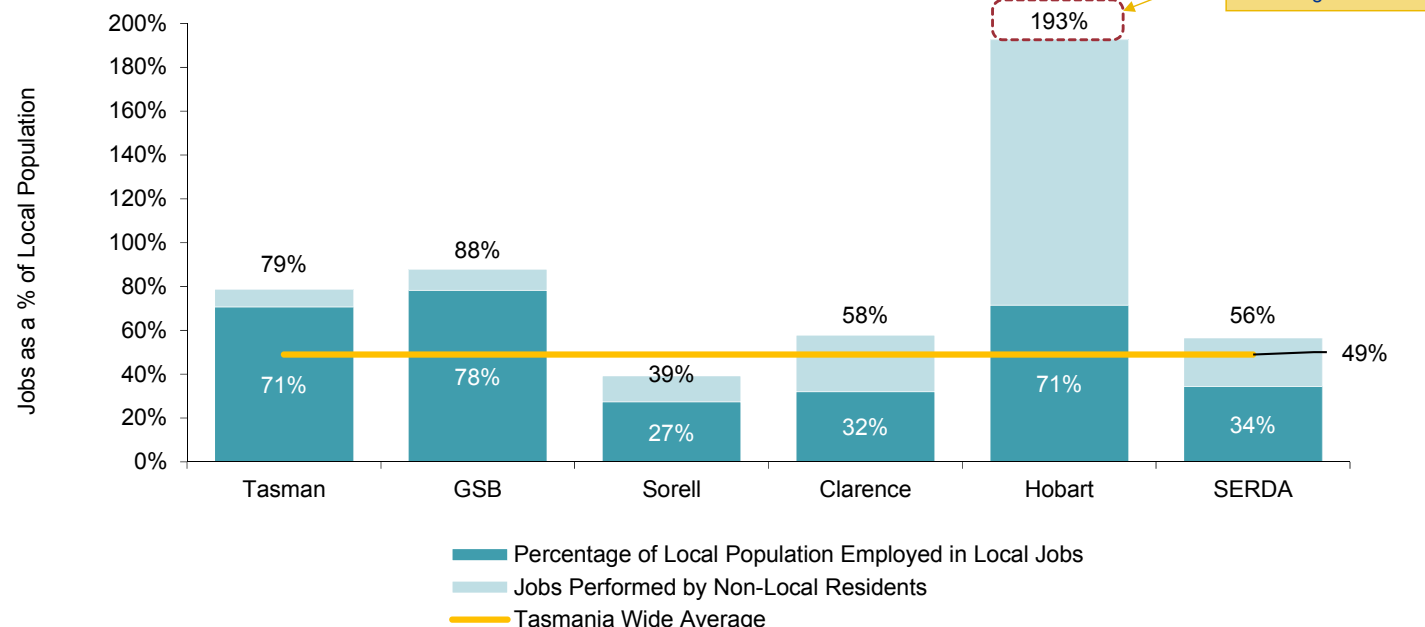
ABS National regional profile by LGA (2012)

Job containment in the Sorell and Clarence regions are very low compared to the Tasmanian Average and other nearby regions. Only 27% of Sorell and 32% of Clarence residents also work there with the rest working in outside regions. More people from Sorell and Clarence actually work in Hobart than they do locally.

Even if Sorell and Clarence focused on employing locally they would still need to add a significant number of jobs to the region to support their populations as there is currently only enough jobs for 39% of Sorell and 58% of Clarence residents assuming they employ local residents exclusively.

Tasman and GSB on the other hand employ a much greater percentage of their workers locally (71% and 78% respectively). However they are at the other end of the scale and provide very little employment to non-local residents compared to Hobart.

Job Self Containment



Self Containment of jobs in the SERDA region

The chart above depicts a number of elements with respect to the number of jobs in each region and the number of locals employed in those jobs. The darker wedge of the stacked column chart represents the percentage of the local population who are also employed in jobs in that same municipality. Here we can see that both Clarence and especially Sorell employ only a small percentage (32% and 27% respectively) of their population in jobs where they live. This is compared to Tasman and GSB who both employ more than 70% of their residents in jobs locally. For comparative purposes the yellow line represents the Tasmanian Wide average for job containment. This shows that across Tasmanian 49% of people both live and work in the same local municipality.

The lighter wedge of the stacked column represents the percentage of available jobs performed by non-local residents in that region. This represents the maximum potential for the region to employ local residents. For example, Hobart have enough jobs in their municipality to almost give each of their residents two jobs each (1.93). However, Sorell only have enough jobs to employ 39% of the working population that resides there assuming they employ only Sorell residents.

ABS National regional profile by LGA (2012)

South-East socio-economic profile

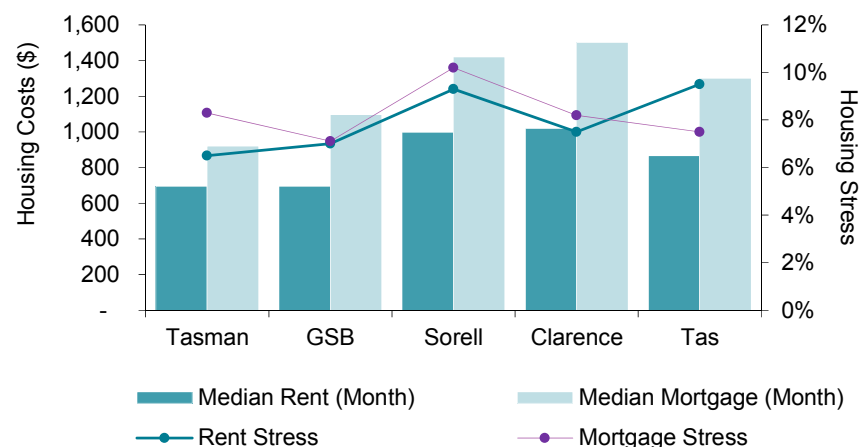
Housing profile

Median rent and median mortgage costs are on average cheaper in the Tasman and GSB regions compared to Tasmania as a whole while Sorell and Clarence median rents and median mortgages are more expensive.

Rent stress (explained to the right) is lower in all four of the regions compared to Tasmanian as whole suggesting that those renting in the SERDA region have a higher average income than those renting in Tasmania more generally. Sorell has the highest level of mortgage stress of all regions (10%).

Dwelling structure by region varies notably across the Tasman and GSB region with a much larger percentage of dwellings owned outright compared to the other SERDA regions and Tasmanian more generally. Sorell has the highest proportion of home owners still with a mortgage which may be why they also have the highest stress level.

Housing Costs and Stress



ABS National regional profile by LGA (2012)

Dwelling Structure by Region						
	Tasman	GSB	Sorell	Clarence	SERDA	Tas
Owned Outright	49%	49%	33%	37%	37%	35%
Owned with Mortgage	29%	23%	45%	38%	38%	33%
Renting	18%	24%	19%	22%	21%	26%
Other	5%	4%	3%	3%	3%	6%

ABS National regional profile by LGA (2012)

Housing affordability relates to a person's ability to pay for their housing. It is a complex issue caused by local housing and labour markets as well as larger economic, environmental and social forces. When people struggle to meet the cost of housing, researchers describe it as housing affordability stress.

Measures of housing affordability can vary, however in Australia a percentage of income spent on housing costs is generally used to estimate the number of households affected. In common use is a benchmark of 30%, meaning those spending more than 30 per cent of their income on housing are considered 'under stress'.

South-East socio-economic profile

Housing profile

Median house prices vary from region to region with Clarence having the highest median values by a large amount.

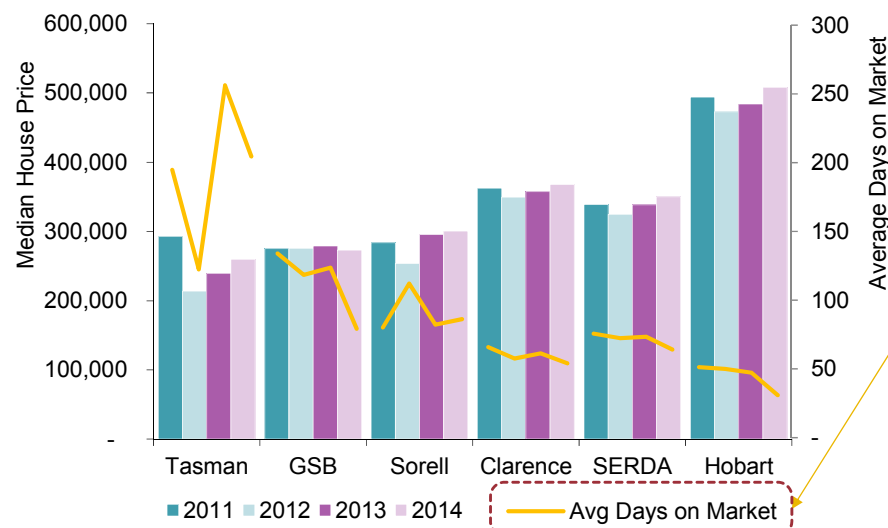
Each region experienced a fall in the median value in 2012 which coincided with the lowest number of sales in the SERDA region for the period as well.

Since 2012 the Tasman, Sorell and Clarence regions have experienced uninterrupted growth in their median values as well as increases in the volume of sales.

The yellow lines on the chart highlight the average days on market for each sales for each year for each region and demonstrate that the most difficult area to sell a house is in the Tasman region while Clarence has a considerably lower average days on market than any of the other regions.

For comparison purposes the suburb of Hobart is utilised on the chart.

Median Price of Houses Sold by Region



This Chart overlays the average number of days that each house spent on market before been sold for each region across the period 2011 through 2014.

Information on this page is sourced from Individual REIT Suburb reports for each region. The number of suburbs for each region is as follows:

Clarence – 25
Tasman – 4
Sorell – 7
GSB – 3

The median price of houses sold by region is calculated by using the weighted average of medians across each of the suburbs in that region for that year. For example a median of \$400,000 during a year with only 5 sales will have less of a weighting than a median of \$250,000 with 30 sales. The weighted median in this example would be:

$$((\$400k \times 5) + (\$250k \times 30)) / 35 = \$271k$$

The % growth shown in the final column of the two tables represents the growth from 2011 through to 2014.

Median Price of Houses Sold by Region

	2011	2012	2013	2014	% Growth
Tasman	292,700	213,900	239,000	259,800	-11.2%
GSB	275,300	275,700	279,300	272,900	-0.9%
Sorell	283,800	253,600	295,500	300,500	5.9%
Clarence	362,600	349,500	357,700	368,000	1.5%
SERDA	338,900	324,500	338,700	350,200	3.3%
Hobart	494,000	472,800	484,400	507,900	2.8%

REIT suburb reports, 2015

Number of Sales by Region

	2011	2012	2013	2014	% Growth
Tasman	17	21	20	23	35.3%
GSB	48	38	47	47	-2.1%
Sorell	172	124	159	136	-20.9%
Clarence	563	518	615	703	24.9%
SERDA	800	701	841	909	13.6%
Hobart	488	498	532	553	13.3%

While visitors to Tasmania increased by 4% in the year ending March 2015, total visitors to the East Coast increased by 16%. More specifically:

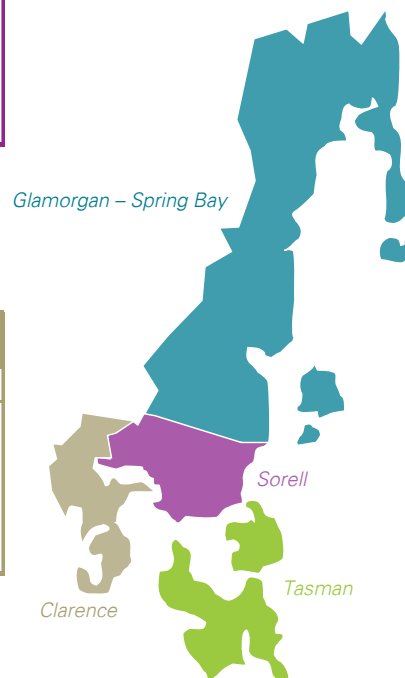
- Port Arthur/Tasman Peninsula remains the pick of the region to spend the most nights, followed by Coles Bay and Bicheno.
- Average nights stayed by visitors increased in Sorell and Richmond, but decreased in Bicheno, Coles Bay, Swansea and Orford.
- Richmond drew the largest amount of tourists who stop and look, followed by Port Arthur/Tasman Peninsula.
- Orford was the only major town in South East Region to experience a decline in total visitors between 2011-2015, as well as decrease in average nights stayed.

Total visitors to the East Coast for the year ended March 2015 was estimated to amount to 314,000.

Sorell					
	11-12	12-13	13-14	14-15	
Visitors	218,557	206,640	231,672	244,438	
Average nights stayed	3.10	3.50	5.40	5.40	
Total nights	39,019	33,141	82,020	81,125	
Stopped and looked	83,837	80,733	93,469	94,780	
Passed through	121,947	116,320	123,120	134,648	

Richmond					
	11-12	12-13	13-14	14-15	
Visitors	209,136	197,640	225,374	245,940	
Average nights stayed	1.90	2.50	2.70	2.00	
Total nights	37,316	39,244	54,555	48,628	
Stopped and looked	128,707	122,914	145,936	156,371	
Passed through	60,693	59,240	59,123	65,514	

Port Arthur/Tasman Peninsula					
	11-12	12-13	13-14	14-15	
Visitors	171,265	159,260	196,594	214,333	
Average nights stayed	2.00	1.90	2.00	2.00	
Total nights	120,963	97,002	141,600	168,059	
Stopped and looked	95,067	93,777	103,963	113,203	
Passed through	14,607	15,055	20,928	18,326	



All information is sourced from the Tourism Tasmania Tasmanian Visitor Survey information. The years represented on this page are from April through March and represent the most current information at the time the report was completed.

Bicheno					
	11-12	12-13	13-14	14-15	
Visitors	149,114	131,207	145,158	175,733	
Average nights stayed	1.90	1.90	2.00	1.80	
Total nights	96,356	98,611	141,028	142,585	
Stopped and looked	58,904	52,746	47,815	59,114	
Passed through	38,319	26,396	27,309	37,351	

Coles Bay					
	11-12	12-13	13-14	14-15	
Visitors	139,218	122,737	133,620	175,568	
Average nights stayed	2.10	2.40	2.50	2.10	
Total nights	105,317	110,076	138,919	159,453	
Stopped and looked	65,497	55,133	55,592	72,656	
Passed through	22,946	21,072	21,817	27,933	

Swansea					
	11-12	12-13	13-14	14-15	
Visitors	156,890	133,062	148,684	179,332	
Average nights stayed	1.80	1.90	1.80	1.60	
Total nights	80,733	77,899	101,310	97,699	
Stopped and looked	58,045	46,557	48,844	59,226	
Passed through	54,050	45,912	43,833	60,257	

Orford					
	11-12	12-13	13-14	14-15	
Visitors	94,823	75,857	74,497	92,406	
Average nights stayed	3.90	2.70	2.40	2.30	
Total nights	35,963	22,202	25,501	30,780	
Stopped and looked	25,443	19,395	20,203	29,164	
Passed through	60,044	48,252	43,783	50,093	

Sorell and GSB have the highest percentage of their land available for Agricultural production. When comparing the total amount of actual land available against the total agricultural land available in Tasmania the SERDA region only accounts for 6.2% of total agricultural land.

There are several notable areas where a region provides a proportionately high amount of a particular agricultural product:

- Clarence produces 70% of the entire states volume of lettuce and apricot production as well as 11% of the total wine production volume.
- GSB provides 89% of the total Walnut trees in the state
- The Tasman region account for 44% of the total Pear production across Tasmania
- Sorell is responsible for 10% of the total number of pigs currently farmed in Tasmania.

The % of Area held for agriculture is the Land use associated with farming as a percentage of total land in the associated region. The % of agricultural area compared to Tas total is the % of agricultural land in that region as a percentage of all agricultural land in Tasmania.

The following is a selection of total production for a variety of agricultural production in the regions. It is not exhaustive but captures the significant items produced in the SERDA regions.

The percentages associated with each region is the amount of production based on the total Tasmanian production

Summary of Agricultural Production						
	Clarence	Sorell	GSB	Tasman	SERDA	Tas
% Area held for Agriculture	27.1%	41.5%	38.2%	24.0%	35.5%	24.19%
% Agriculture Area Compared to Tas Total	0.6%	0.9%	3.8%	1.0%	6.2%	100.00%
Fruit and Veg						
Lettuce (kg)	69.9%	3.7%	-	-	73.5%	2,767,919
Peas (kg)	5.7%	-	-	-	5.7%	13,240,632
Potatoes (t)	0.0%	1.8%	-	-	1.9%	251,752
Apricots (kg)	70.8%	2.3%	-	3.2%	76.2%	1,845,540
Cherries (kg)	1.5%	1.2%	0.0%	0.3%	3.0%	3,416,145
Olives (kg)	5.9%	2.0%	4.7%	-	12.7%	71,122
Apples (kg)	0.0%	-	-	0.1%	0.1%	27,253,872
Pears (kg)	-	-	-	44.4%	44.4%	844,908
Walnuts (total trees)	3.7%	1.2%	89.3%	-	94.2%	214,223
Strawberries (kg)	0.2%	-	0.6%	0.1%	1.0%	417,379
Wine						
Wine Production (t)	11.0%	0.8%	8.7%	0.2%	20.7%	7,446
Livestock						
Dairy Cattle (no.)	0.0%	0.6%	-	-	0.6%	222,628
Meat Cattle (no.)	0.2%	1.2%	0.6%	0.6%	2.6%	466,583
Sheep (no.)	0.9%	1.4%	6.0%	0.4%	8.7%	2,344,469
Pigs (no.)	0.4%	10.0%	-	-	10.5%	12,833
Other Livestock (no.)	5.1%	4.1%	0.9%	4.7%	14.8%	13,741

71210D0018_201011 Agricultural Commodities, Australia, 2010-11

- **Population:** Overall the population of the SERDA region is growing faster than the Tasmanian average. This is driven by Sorell and Clarence which has consistently been above the Tasmanian average over the last five years. GSB and the Tasman council however, have had some years of negative growth during this period. In comparison to state-wide population data, there is proportionately less younger people and more people of retirement age living in the SERDA region. This is predominately driven by the different age profile in the Tasman and GSB regions with Sorell and Clarence more closely aligned to the average Tasmanian age profile.
- **Income support:** As a result of the different age profiles, the population in the Tasman and GSB regions are more reliant on Government Payments than Sorell and Clarence who report similar levels of support as the Tasmanian Average. The higher support requirements in Tasman and GSB regions is largely driven by higher rates of pensioners and youth allowance recipients. Newstart and Parenting support levels are relatively similar across all areas however, Carer and Disability Payments are markedly higher in the SERDA region than the Tasmanian average. This is driven by a much higher than average percentage in the Clarence region.
- **Jobs:** Analysis of the jobs in the Clarence and Sorell regions showed they are closely correlated to the Tasmanian average jobs by industry experiencing only minor differences in Public Administration and Safety (smaller proportion), and Retail, and Education and Training (greater proportion). On the other hand Tasman and GSB have several notable differences. There are a smaller proportion of jobs in the Public Administration and Safety, Health Care, and Retail Trade industries and a significantly greater proportion of jobs in the Agriculture and Fishing, Arts and Recreation, and Accommodation and Food Services industries.
- **Changing workforce profile:** Clarence added the most jobs total when compared to the other regions. Clarence added the majority of its jobs in the Education and training and Utility Services industries while Sorell added jobs in the Health care, Retail and Accommodation services industries. Both the Tasman and GSB regions experienced a greater number of net job losses in industries than Sorell and Clarence. Tasman and GSB both added the most number of jobs to their region through the Health care and social assistance industry. Overall, across the entire SERDA region net jobs lost in the Manufacturing (-97) was the most significant. The most jobs added occurred in the Education and Training industry (483).
- **Job containment** in the Sorell and Clarence regions are very low compared to the Tasmanian average and other nearby regions. Only 27% of Sorell and 32% of Clarence residents also work there with the rest working in outside regions. More people from Sorell and Clarence actually work in Hobart than they do locally.
- **Dwelling structure:** Dwelling structure by region varies notably across the Tasman and GSB region with a much larger percentage of dwellings owned outright compared to the other SERDA regions and Tasmanian more generally. Sorell has the highest proportion of home owners still with a mortgage which could anecdotally be linked to a higher number of first home buyers which also may explain why they also have the highest mortgage stress level.
- **Building approvals:** Approvals for the regions were at their highest during the years 2009 and 2010. Since then each region experienced a reduction in growth of the number of building approvals, broadly inline with Tasmania as a whole. During the same period the value of private sector houses experienced strong consistent growth between 2009 and 2012. This was mitigated somewhat by a reduction in value in 2013 in all regions except the Tasman. During the selected period only the value in GSB was less in 2013 than it was in 2009, all other regions experienced some level of appreciation. Sorell currently has 1,118 approved resident lots available for construction. This will drive continued growth in building approvals over the next few years
- **Rent and mortgage values:** Median rent and median mortgage costs are on average cheaper in the Tasman and GSB regions compared to Tasmania as a whole while Sorell and Clarence median rents and median mortgages are more expensive. Rent stress is lower in all four of the regions compared to Tasmanian as whole. Sorell has the highest level of mortgage stress of all regions (10%).
- **Tourism:** Visitor numbers to the regions significant areas have shown strong positive growth over the last four years. The data indicates that there were more visitors who were willing to spend more time in the region. Tourism represents a key area of growth for the south east region and should continue to be a strong economic driver into the future.
- **Agriculture:** Sorell and GSB have the highest percentage of their land available for Agricultural production. The SERDA region accounts for 6.2% of total available agricultural land in Tasmania. The region provides a proportionately high amount of agricultural product in lettuce (70% of Tasmania); walnuts (89%), and; pears (44%).

Overall, the south east region has undergone a significant period of growth with respect to population, tourist numbers, housing values and property sales while also undergoing a continuing change in the industry and employment profile. In many ways, Sorell and Clarence are similar to the Tasmanian averages, while Tasman and GSB have some notable differences that generally point to higher levels of economic disadvantage. The data analysed in this section indicates that the older age profile, the comparatively low capacity for Sorell and Clarence to support jobs in these regions and a high reliance on motor vehicles for transport to work are some of the key emerging challenges for the south east region.

4. Foreseeable projects and initiatives

What changes are happening in the south east region in the foreseeable future?

What changes are happening in the SE region in the foreseeable future?

This section provides a listing of the foreseeable projects that have emerged through the consultation process*.




















These projects are potential drivers of economic development in the south east region.

In order to provide some insight into the scale of these projects, a sizing exercise has been undertaken, that seeks to quantify the potential scale of the projects according to their impact on:

- Resident population
- Jobs
- Visitors, and
- Capital expenditure

The projects have been categorised by the sectors, other than those projects that have multi-sectoral impacts.

**This section has not addressed the other key driver of change, namely the growing residential base in and around Sorell. Resident population (medium series estimates would see the Sorell population increase from 13,407 to 18,841 by 2036 – a 40% increase of 5,434.*

Impact Rating Criteria Description			
Resident Population Sizing		Jobs Sizing	
1. Very large = 500+		1. Very large = 200 +	
2. Large = 250-500		2. Large = 100-200	
3. Medium = 100-250		3. Medium = 50-100	
4. Moderate = 50-100		4. Moderate = 10-50	
5. Small = <50		5. Small = <10	
Visitor Sizing		Capital Expenditure Sizing	
1. Very large = 50,000+		1. Very large = \$50M+	
2. Large = 20,000-50,000		2. Large = \$20-\$50M	
3. Medium = 5,000-20,000		3. Medium = \$5-\$20M	
4. Moderate = 1,000-5,000		4. Moderate = \$1-\$5M	
5. Small = <1000		5. Low = less than \$1M	

Foreseeable projects

Multi-sectoral 'game changing' projects

The combination of game changing projects in the region could drive/ facilitate:

- An increase in the resident population of 250-500
- An increase in jobs of 400-750
- An increase in visitor numbers of 70,000 – 100,000
- An increase in capital expenditure of \$60-120M

These enabling projects have consequential impacts on a number of sectors in the south-east region, notably, agriculture, aquaculture and tourism

Foreseeable projects									
No	Description	Enabler	Pop	Jobs	Vis. ('000)	Cost (\$M)	Horizon (Years)		
							1-3	3-5	5-10
1	South East Irrigation Scheme uptake	Irrigation							
2	Swan Valley Irrigation Scheme roll out and uptake	Irrigation							
3	Hobart International Airport runway extension	Airport							
4	Antarctic support services and infrastructure	Airport							
	Total		250-500	400-750	70-100	60-120			

Foreseeable projects

Hobart International Airport runway extension

A longer runway opens up exciting new opportunities for Tasmania and enables larger aircraft to further from Hobart. The longer runway can enable:

- **Freight** – deliver new opportunities for direct export straight to important Asian markets for our seafood, fruit and other fresh produce
- **Tourism** – provide the potential for direct passenger flights between Hobart and Asian Markets as well as one stop flights to Europe
- **Antarctic** – strengthening Hobart's position as the preferred Antarctic Gateway by providing a complete logistic hub with increased aviation capability.

Economic impacts are significant

- **Currently, the Airport (and its contractors and tenants employs 437 jobs and contributes \$105 million in direct economic activity (731 jobs and \$143 million multiplied)**
- **By 2035, direct jobs will increase to 536 and direct economic benefit will increase to \$164 million (849 jobs and \$227 million multiplied)**



Extension

The runway's extension is being supported with funding assistance of \$38 million from the Australian Government. Hobart Airport is contributing a further \$2 million. The runway will be extended 150 metres to the north and 350 metres to the south. The project also includes a large aircraft apron and changes to the local road network around the airport. These are being designed to improve traffic and access for the local community and business. The Airport is one of the regions largest employers and contributors to the local economy and that is expected to increase with the added capacity afforded by developments at the airport. The 2015 Draft Master Plan projects:

- Passenger movements to increase from 2.1 million now up to 4.6 million by 2035 and aircraft movements to double from 16,000 now up to 32,000 over that period. That may translate to an increase in visitors to Tasmania from approximately 1.0M now, to 1.5M by 2020, to 2.3M by 2035, all other things being equal.
- Freight flights to increase from 2 up to 5 per day over the next five years, and
- Antarctic related flights to increase from 13 to 24 per annum over the next five years.

These increases will substantially drive the growth in economic activity and jobs in the region. It will also lead to increases in traffic movements, which are estimated to increase from 7,300 per day now up to 27,300 by 2035.

Foreseeable projects

South East Irrigation Scheme 3

The Sorell Irrigation Scheme is completed. It is expected to begin operations during the 2015-16 irrigation season.

The district will service agricultural, horticultural and viticulture enterprises around the townships of Tea Tree, Campania, Orierton, Pawleena, Penna, Sorell and Forcett. Current production in the area includes cherries, apples, salad vegetables, wine grapes, apricots, olives and walnuts.

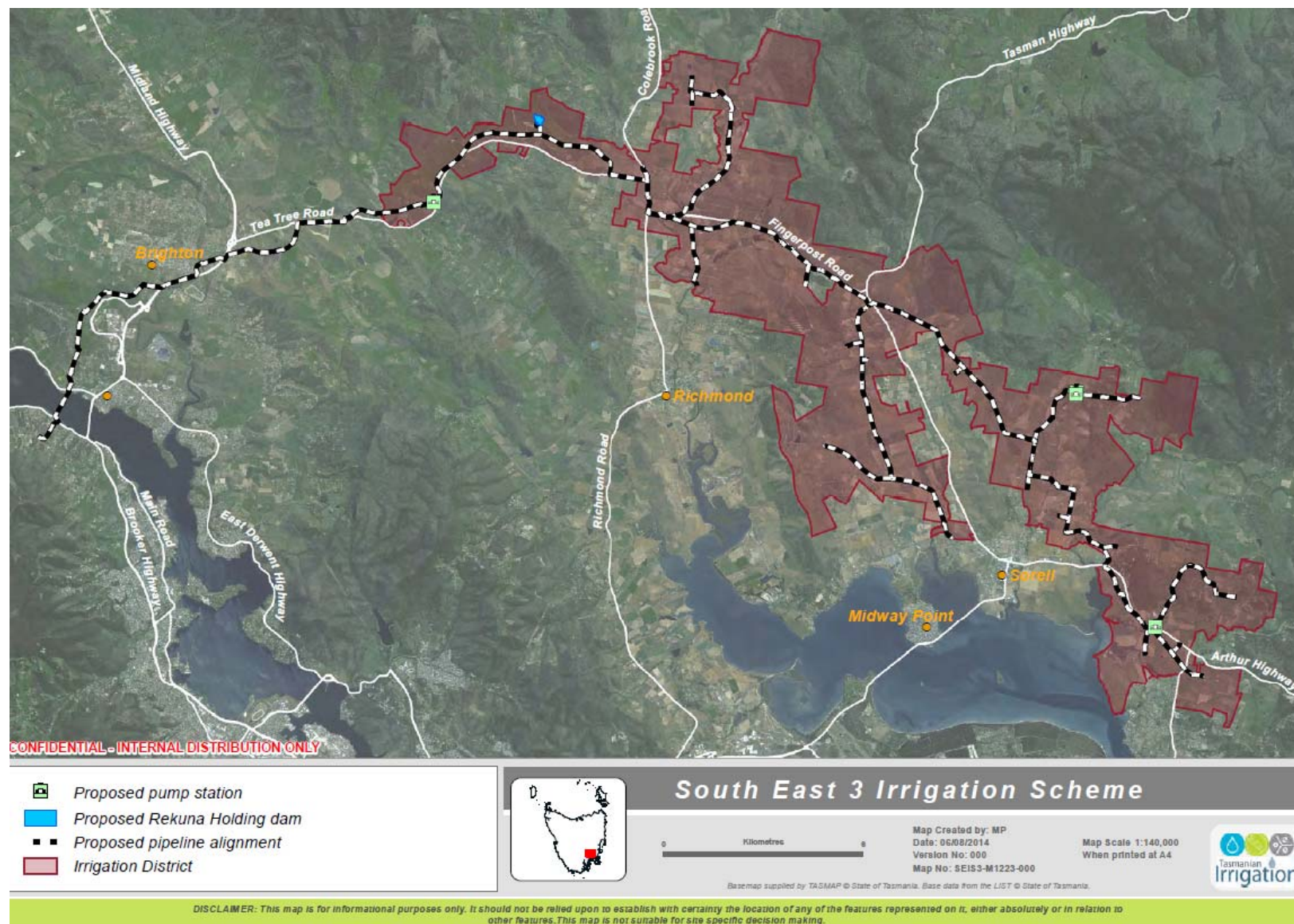
The scheme has the capacity to supply 6,000 ML of water over two delivery periods; 3,000 ML during a 180-day summer delivery period (October – March) and 3,000 ML during a 180-day winter delivery period (April – September).

Estimated impacts are significant:

- \$56 million in on-farm in on-farm investments over 5-10 years
- Net economic benefit of \$8 million p.a. at steady state
- Increase in direct farm jobs of 370 FTEs and a further 185 indirect FTEs

Stages 1 and 2 (3,500 MI) are sold out. Stage 3 has 670 MI still to be sold out of 3,000 MI available.

<http://www.tasmanianirrigation.com.au/index.php/schemes/south-east-stage-3>



A number of tourism/ residential developments have been proposed, many of which are close to construction. Combined, these could contribute:

- An increase in the resident population of 600-800
- An increase in jobs of 100-200
- An increase in visitor numbers of 100,000 – 150,000
- An increase in capital expenditure of \$100M - \$250M

The visitor experience provided by these top 10 foreseeable developments will be further enhanced by other social infrastructure that is planned for the region.

Foreseeable projects							Horizon (Years)		
No	Description	Enabler	Pop	Jobs	Vis. ('000)	Cost (\$M)	1-3	3-5	5-10
1	New Federal accommodation at Port Arthur								
2	New accommodation to replace site taken over by Federal (e.g. Bush mill site)								
3	Remarkable Lodge development at Crescent Bay								
4	Prosser River stabilisation and related developments- marina, caravan park, shops								
5	SOLIS Residential development								
6	SOLIS Golf Course								
7	Waters Edge Redevelopment								
8	Spring Bay Redevelopment								
9	Triabunna Marina extension and Boatel 40 unit development to compliment the marina								
10	Port Arthur Visitor Centre Upgrade								
11	Other social infrastructure to support tourism – signage, interpretation, facilities, mountain bike parks								
12	Marine infrastructure - jetties, boat ramps, marinas Coles Bay, Swansea, Triabunna, Orford, Dunally								
13	Pirates Bay Visitor Zone Eagle Hawk Neck								
TOTAL			600-800	100-200	100-150	100-150			


























Foreseeable projects Agriculture and aquaculture

A sample of the major employers in the south east region indicated there are expansion projects at varying stages of development that could collectively lead to:

- An increase in the resident population of up to 250
- An increase in jobs of 50-250
- No change to visitor numbers to the region
- An increase in capital expenditure of \$5-\$25M

The TASSAL projects have commenced whereas the ongoing expansion plans for Houston's, Inghams and other aquaculture producers are less certain.

This does not include the other potential agricultural expansion opportunities that could emerge through the SEIS 2 and 3 and the Swan Valley Scheme outlined in the 'game-changer' initiatives.

Foreseeable projects								
No	Description	Pop	Jobs	Vis. (‘000)	Cost (\$M)	Horizon (Years)		
						1-3	3-5	5-10
1	Potential Ingham expansion around Sorell and region							
2	Potential Houston's Farms expansion in Forcett							
3	TASSAL fish waste processing plant north of Triabunna							
4	TASSAL expanded salmon farming around Spring Bay							
5	Expanded marine farming around Barilla Bay, Pittwater and Pipe Clay Lagoon							
	TOTAL	100-250	50--250	n/a	5-25			

Foreseeable projects

















Construction, manufacturing, wholesale and retail

Projects in construction, manufacturing, wholesaling and retailing sectors have centred around the Cambridge and Airport precincts. This sample could generate:

- An increase in the resident population of up to 250
- An increase in jobs of 200-400 jobs
- No change to visitor numbers to the region
- An increase in capital expenditure of \$30-100M

Much of this potential expenditure has not been specifically identified as part of this study, but there is an abundance of appropriately zoned land for this expansion to occur over the next 5-10 years.













The C-cell at Copping Refuse Disposal Site will be operational by July 2016. This facility will then be able to take Antarctic waste.

Foreseeable projects								
No	Description	Pop	Jobs	Vis. ('000)	Cost (\$M)	Horizon (Years)		
						1-3	3-5	5-10
1	Big box developments around Cambridge/ Airport			N/A				
2	Expanded light industrial, engineering/ storage around Cambridge			N/A				
3	Expanded marine biotechnology sector around Cambridge			N/A				
4	C-Cell development at Copping to be operational by mid-2016			N/A				
	TOTAL	100-250	200-400	N/A	30-100			

Projects in the social services sector are less common. This sample could generate:

- An increase in the resident population of up to 100
- An increase in jobs of 100-250 jobs
- No change to visitor numbers to the region
- An increase in capital expenditure of \$30-\$70M

The health resort opportunities are not yet clear, whereas the aged care development in Sorell and the Bicheno Public Service Centre are further advanced.

Foreseeable projects								
No	Description	Pop	Jobs	Vis. (‘000)	Cost (\$M)	Horizon (Years)		
						1-3	3-5	5-10
1	Health resort opportunities			N/A				
2	Aged care development in Sorell on land adjoining the Council Chambers			N/A				
3	Bicheno Public Service Centre			N/A				
	TOTAL	>100	100-250	N/A	\$30-70			

Foreseeable projects Summary

The combined impact of the foreseeable projects that will drive economic growth in the region over the next 10 years may amount to:

- An increase in the resident population of up to 2,000
- An increase in jobs of up to 1,800 jobs
- An increase in visitors to the region of 170,000 – 250,000 per annum
- An increase in capital expenditure of \$250M - \$600M

These impacts are purely project driven and do not take account of natural growth and migration to the region. Notwithstanding, (and excluding Clarence) these projects alone would represent a 10% increase in the resident population of 20,300, an 30% increase on the 4,300 jobs and a 50% increase in the 314,000 visitors. The growth drivers could have significant implications for the region.

Foreseeable projects					
No	Description	Pop	Jobs	Vis. ('000)	Cost (\$M)
1	Game changers	250-500	400-750	70-100	60-120
2	Strategic growth - Tourism and recreation	600-800	100-200	100-150	100-250
3	Strategic growth - Agriculture and aquaculture	100-250	50--250	n/a	5-25
4	The traditional sectors - Construction, manufacturing, wholesale and retail	100-250	200-400	N/A	30-100
5	Social services – Health and Education	0-100	800 -250	N/A	30-70
	TOTAL	1,000-2,000	1,000-1,800	170-250	250-600

Foreseeable projects

Summary of consultations – regional SWOT

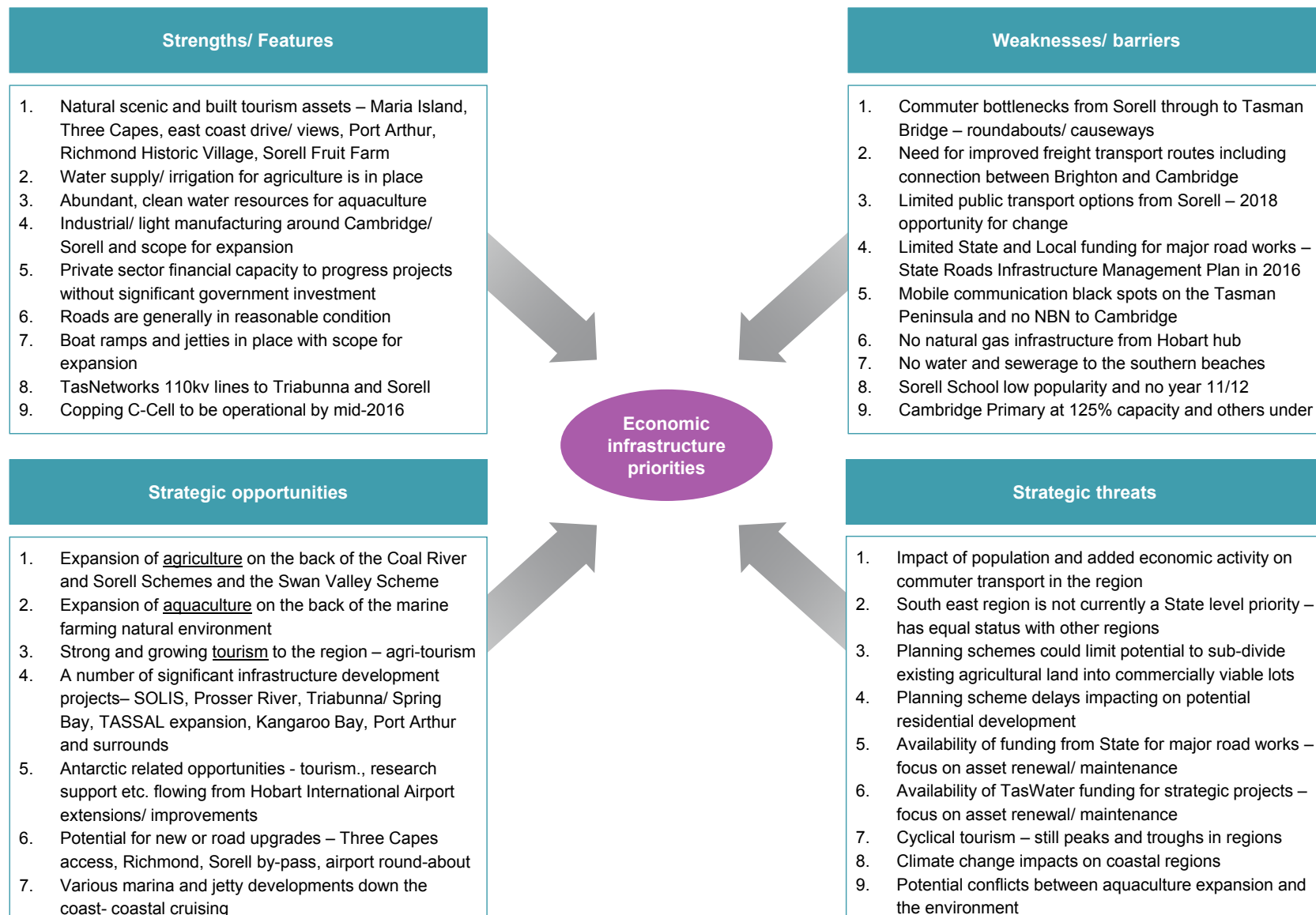
The key drivers of economic growth in the region are:

- developments at the Hobart Airport, and the impacts this could have on
 - Antarctic support services
 - Visitor access
 - Air freight
- the irrigation schemes along the Coal River Valley and the Swan Valley

These 'game changers' will drive expansion in the strategic growth sectors of agriculture, aquaculture and tourism in the region.

Upside remains in the more traditional construction and light manufacturing around Cambridge and Sorell

The potential impediments to growth relate to roads and transport, water and sewerage, communications and, to a lesser extent, energy. Issues do not appear to be 'chronic' but there are some pressure signs showing that will only get worse without interventions.



5. The implications of change

What are the issues/ potential implications of those changes on regional infrastructure?

What are the issues/ potential implications of those changes on regional infrastructure?

This section provides a high-level assessment of the implications of those foreseeable projects on the key infrastructure enablers that are relevant to this regions

- Roads/ transport
- Water and waste water
- Irrigation
- Energy
- Airport
- Commercial/ industrial land
- Housing/ residential land
- Communications
- Social infrastructure

This qualitative assessment of impacts is presented using a ‘heat-map’ that illustrates the range of potential implications. Further discussion of implications that create potential risk is provided.

Significance	Criteria
Major/ high issues/ risks	Considerable risk of issues/ barriers to development arising from inadequate infrastructure
Moderate/ minor issues/ risk	Some risk of issues/ barriers to development arising from inadequate infrastructure
Negligible	Little, if any issues/ barriers to development arising from inadequate infrastructure
Moderate/ minor beneficial	Moderate strength to support economic development due to adequate infrastructure
Major/ high beneficial	Major strength to support economic development due to unused capacity in infrastructure

Implications of change

Foreseeable pressure points on enabling infrastructure

The heat map illustrates:

- **Roads and transport** infrastructure is an impediment to longer term growth of tourism and agriculture, especially where those industries 'collide'
- **Water and waste water** infrastructure may be an impediment to some participants in the tourism, agriculture and aquaculture sectors, despite plans to spend \$55 million over the next 5 years
- **Energy** may be an impediment to some participants in construction/ manufacturing around the Cambridge Industrial Park
- **Communications infrastructure** is an impediment to some participants (and visitors) in the tourism, agriculture and aquaculture sectors, particularly in remote regions
- **Social infrastructure** is an impediment to tourism and some social services (mainly education)

The region is well served by irrigation, the airport and land for commercial/ industrial/ residential development. There is cope to leverage these strengths, but there are risks.

Pressure Points								
Enablers		Sector Focus Areas						
Infrastructure		Tourism	Agriculture	Aquaculture	Antarctic support	Construction/ manufacturing	Wholesale and retail	Social services
	Roads/ transport	1	2					
	Water & waste water	3*	4*	5*				
	Irrigation							
	Energy					6*		
	Airport							
	Commercial/ industrial land							
	Housing/ residential							
	Communications	7	8	9				
	Social infrastructure	10						11

* Refer to Appendix B for TasWater's and TasNetworks Forward Capital Works Program for the councils in the region






Implications of change

Foreseeable pressure points on enabling infrastructure

No.	Contributing Factors	Implications	Timeframe...this will become an issue in...		
			1-3	3-5	5-10
1	Roads and Transport Tourism <ul style="list-style-type: none"> Potential for more visitor traffic on Tasman bridge and causeways, impacting resident amenity Potential for more visitor traffic on the Arthur Highway to the Tasman Peninsula Potential for more visitor traffic on the Tasman Highway to Orford and beyond Potential for more visitor traffic to Richmond Increased visitor traffic from the airport – passenger trips are estimated to increase from 7,100 to 16,100 per day by 2035 Public transport options to Sorell and beyond are limited to two private operators until 2018 Metro's current operating boundary does not extend beyond Acton/ Seven Mile Beach General residential growth 	<ul style="list-style-type: none"> Reduced visitor amenity Increased travel times for visitors Increased risk of visitor led accidents Increased congestion in and around Sorell Increased congestion around the airport roundabout Fewer public transport options to visitors and residents 			
2	Roads and Transport Agriculture <ul style="list-style-type: none"> Potential for more agriculture related traffic movements (e.g. Houston's at Forcett, Inghams at Tasman) from Tasman through Sorell to Brighton and beyond for sea freight from Devonport Potential for more agriculture related traffic movements through the Coal River Valley to Cambridge and beyond (for processing) Potential for more agriculture related traffic movements through the Coal River Valley to Brighton and beyond for sea freight from Devonport Potential for more freight movements through the airport – freight trips per day are estimated to increase from 330 to 550 per day by 2035 	<ul style="list-style-type: none"> Reduced agricultural productivity Increased freight times Increased risk of visitor led accidents Increased congestion in and around Sorell Increase congestion through the township of Cambridge 			





Implications of change

Foreseeable pressure points on enabling infrastructure

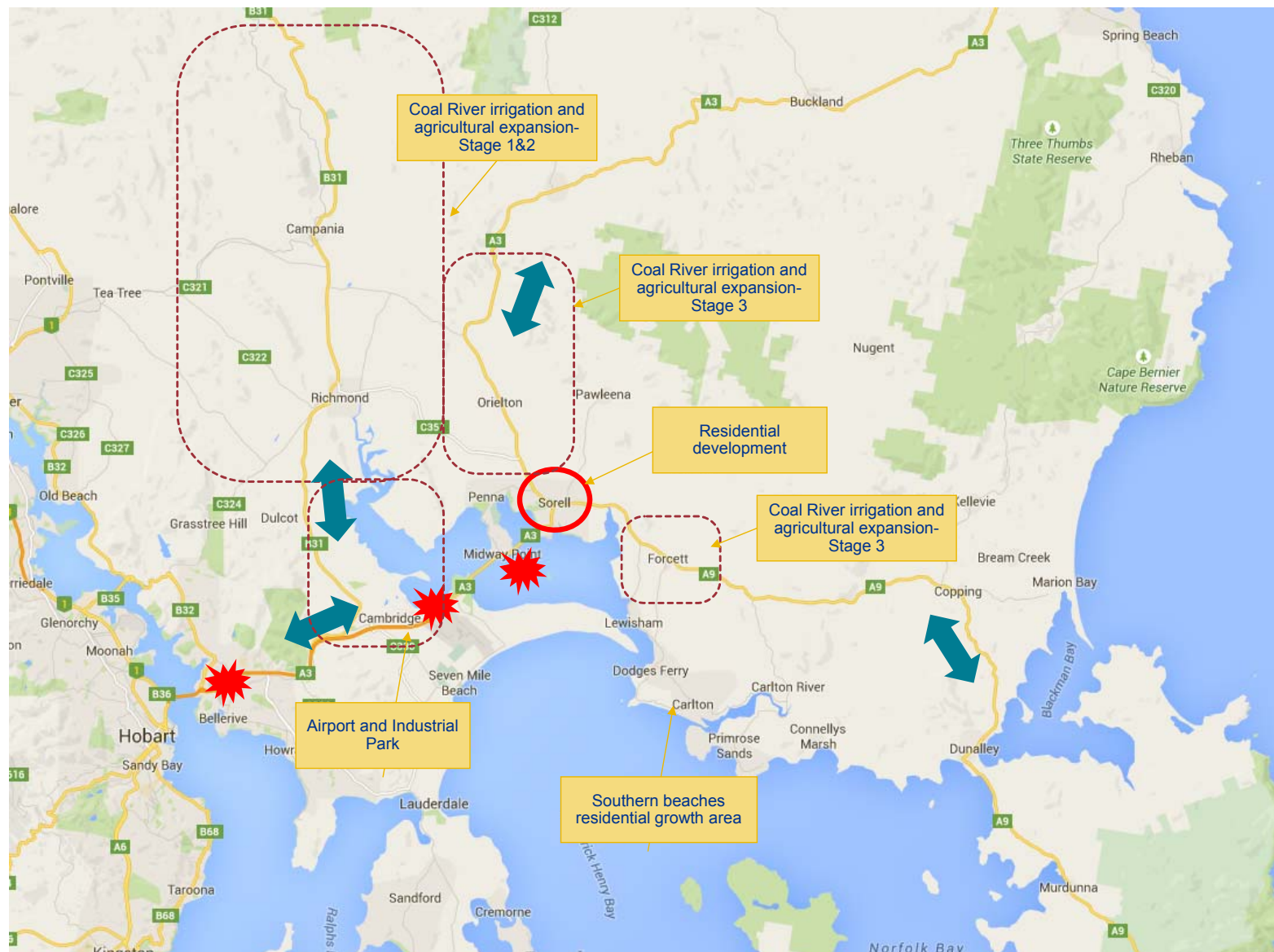
No.	Contributing Factors	Implications	Timeframe...this will become an issue in...		
			1-3	3-5	5-10
3	Waste and Water Tourism <ul style="list-style-type: none"> Port Arthur Water and Sewerage Schemes are owned and managed by the Authority and would be under increasing pressure if visitors numbers materially increase Other businesses in the Port Arthur region also use the Authority's water and sewerage systems Water & sewerage services are not available at the Coal Mines 	<ul style="list-style-type: none"> Risk on non-compliance with water and waste water standards Public health risks for visitors Limited ability to improve the Coal Mines as a more attractive visitor destination, despite it being as historically significant as Port Arthur 			
4	Waste and Water Agriculture <ul style="list-style-type: none"> Some irrigation schemes in the Coal River Valley are still owned and operated by TasWater and at this point are not regarded as high priority Ingham waste water is irrigated on land adjoining factory in Sorell 	<ul style="list-style-type: none"> Risk of water reliability and performance issues impacting adversely on production Limitations to Ingham expansion in Sorell under current waste water treatment practice – production could potentially be doubled Land adjoining the Ingham plant is not achieving highest and best use, (e.g. potential industrial expansion site) Public health risks 			
5	Waste and Water Aquaculture <ul style="list-style-type: none"> Water supply and waste water treatment around Triabunna may be only adequate for the current scale of activity 	<ul style="list-style-type: none"> Potential limitations to further significant TASSAL expansion Public health risks 			
6	Energy Construction/ manufacturing <ul style="list-style-type: none"> There is no reticulated gas to the Cambridge Industrial Park There have been some reliability/ performance issues with energy supply to the Cambridge Industrial Park 	<ul style="list-style-type: none"> Potential limitation to further small manufacturing sector in the region Risk of lost output/ productivity/ wastage for food processors 			
7	Comms Tourism <ul style="list-style-type: none"> Inadequate mobile phone and internet coverage/ infrastructure on the Tasman Peninsula and in parts of Glamorgan Spring Bay 	<ul style="list-style-type: none"> Reduced visitor amenity Restricted access to marketing information for local attractions/ services 			

Implications of change

Foreseeable pressure points on enabling infrastructure

No.	Contributing Factors	Implications	Timeframe...this will become an issue in...		
			1-3	3-5	5-10
8 Comms	Construction/ manufacturing <ul style="list-style-type: none"> NBN roll-out has not progressed to the Cambridge Industrial Park 	<ul style="list-style-type: none"> Lost productivity Decreased relative competitiveness 			
9 Comms	Aquaculture <ul style="list-style-type: none"> Inadequate mobile phone and internet coverage/ infrastructure on the Tasman Peninsula and in parts of Glamorgan Spring Bay 	<ul style="list-style-type: none"> Lost productivity Increased occupational health and safety risks for aquaculture workers at sea 			
10 Social infrastructure	Tourism <ul style="list-style-type: none"> Some under-developed social infrastructure Increasing visitor numbers Increasing residential demand for improved services 	<ul style="list-style-type: none"> Reduced visitor amenity Reduce repeat visits Adverse impacts on facilities e.g. blockages of toilets etc. 			
11 Social infrastructure	Social services <ul style="list-style-type: none"> Increasing demands on health and education services for supporting social infrastructure such as: <ul style="list-style-type: none"> child care centres after school care School children attending schools outside of their more immediate zone <ul style="list-style-type: none"> Sorell High School being under supported Cambridge Primary being over supported 	<ul style="list-style-type: none"> Challenges attracting workers who have competing family priorities School classes being over desirable capacity School classes and facilities being under desirable capacity Addition congestion on roads to by-pass in-zone school in order to attend out-of-zone school 			

Pressure points are manifesting by way of growing traffic through Sorell & on the main route from Sorell to Hobart. Though not at breaking point, some measures are needed to relieve these growing pains.



6. Potential responses to the challenges

In light of the indications of what the region may become, what could be done to respond to the potential pressure points/risks?

In light of the indications of what the region may become, what could be done to respond to the potential pressure points/ risks?

This section provides high-level assessment of a range of potential responses to the drivers of change of the issues/ pressure points that have been identified in the previous section.

In order to present this analysis, the potential responses have been filtered according to







- Capital expenditure that may be required
- The relative effort required
- The potential benefits, and
- The timeframe for those responses to be put in place.



This results in a 'bubble chart' that presents:

- 'Quick wins' – lower effort, higher benefit, shorter time frame
- 'Long game' – higher effort, higher benefit, longer time frame
- 'Don't go there' – higher effort, lower benefit, long time frame
- 'Worth a look' - lower effort, lower benefit, shorter time frame



Further discussion of these responses, including recommended actions, assignment of responsibilities and potential sources of funding is provided.

High-level assessment criteria	
Capital expenditure ranking	
1. Low	less that \$1M
2. Moderate	\$1-\$5M
3. Medium	\$5-\$20M
4. Large	\$20-\$50M
5. Very large	\$50M+
Relative effort assessment	
Low	Comparatively easy and rapid implementation
Medium	Moderately complex, medium term implementation
High	Highly complex and lengthy implementation
Relative benefit assessment	
Low	Comparatively small and confined overall potential benefit
Medium	Moderate overall potential benefit
High	Comparatively high and widespread potential benefit


No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
1	Upgrade the Richmond Road to support growing agri-tourism to Coal River Valley and Richmond. This could improve the co-sharing of this road for residents, visitors, freight haulers and other recreational road uses (cyclists)	<ol style="list-style-type: none"> Undertake a more detailed assessment of current and potential traffic impacts on the Richmond Road Investigate establishing a by-pass of Cambridge Factor that analysis and this potential response into the State Roads Infrastructure Asset Plan due in 2016 	DSG-Roads	Large	High	High			
2	Construct a by-pass of Cambridge from the Richmond Road to the Acton inter-Change	<ol style="list-style-type: none"> Investigate establishing a by-pass of Cambridge Factor that analysis and this potential response into the State Roads Infrastructure Asset Plan due in 2016 	DSG-Roads	Large	High	High			
3	Undertake improvements to the airport roundabout, such as construction of an overpass. This could allow a free flow of traffic from Sorell and beyond and avoid the delay at the airport round about	<ol style="list-style-type: none"> Undertake a more detailed assessment of current and potential traffic impacts at the airport round about Factor that analysis and this response into the State Roads Infrastructure Asset Plan due in 2016 	DSG-Roads	Large	High	High			
4	Undertake ongoing improvements to the Arthur Highway such as overtaking turnouts etc. This may improve visitor amenity and improve the co-sharing of this road for residents, visitors, freight and refuse haulers, and other recreational road uses (cyclists)	<ol style="list-style-type: none"> Factor the need for ongoing improvements to the Arthur Highway into the State Roads Infrastructure Asset Plan due in 2016 Factor into that assessment, any changes in truck movements arising from both visitors and commercial traffic using the augmented Copping RDS C-Cell 	DSG-Roads	Medium	Medium - Low	Low			
5	Investigate a Sorell By-Pass to the southern beaches. This could reduce travel times from/ to that growing residential area (and beyond such as Port Arthur) and minimise the risk of growing congestion through Sorell;	<ol style="list-style-type: none"> Undertake a more detailed assessment of current and potential traffic impacts on Sorell Factor that analysis and this potential response into the State Roads Infrastructure Asset Plan due in 2016 	DSG-Roads	Very large	High	High			
6	Investigate potential Sorell By-Pass to east coast. This could reduce travel times from/ to east coast, which stands to experience the more significant visitor growth in the region in the coming years	<ol style="list-style-type: none"> Undertake a more detailed assessment of current and potential traffic impacts on Sorell Factor that analysis and this potential response into the State Roads Infrastructure Asset Plan due in 2016 	DSG-Roads	Very large	High	Medium			

No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
7	<p>Improved public transport to/ from Sorell and beyond. This could create more travel options for visitors and residents and assist in relieving the travel time and congestion concerns that current exist and could go with more visitors, residents and jobs in the region.</p> <p>The improvement in public transport services could also include improved services to the Cambridge commercial precinct and the Hobart Airport.</p>	<ol style="list-style-type: none"> Undertake a more detailed passenger demand forecasting/ analysis Factor that analysis and this potential response into the State Passenger Transport public transport contract renewal process that is set to commence in 2016 and will due for implementation in 2018 Investigate options for Metro's current boundary to be extended to encompass Sorell and consider the associated additional infrastructure that may be required to support that extension such as, but not limited to additional buses, park and ride space, shelters, kerb and gutter modifications etc. Investigate the feasibility of a Park and Ride bus interchange at Sorell as part of the overall public transport solution 	<p>DSG- Passenger Transport</p> <p>Metro</p>	Medium	Medium	High			
8	<p>Other gravel road upgrades to bitumen e.g.</p> <ul style="list-style-type: none"> Three Capes Walk (most important) Coal River Mines (only 2-3 kms) Weilangta Forest Road. (least important) <p>This could improve visitor amenity to these important and increasingly popular destinations, and reduce travel times</p>	<ol style="list-style-type: none"> Undertake a more detailed assessment of current and potential traffic impacts on key roads used by visitors to the region Factor that analysis and this potential response into the State Roads Infrastructure Asset Plan due in 2016 and other council roads asset management plans (in the case of council owned roads) Establish agreed/ shared priorities having regard to that analysis 	<p>DSG- Roads</p> <p>Councils</p>	Large	Medium	Medium			



No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
1	Undertake improvements/ extend capacity of the Port Arthur Water and Sewerage services in order to meet potential growing visitor demand at that popular destination	<ol style="list-style-type: none"> Undertake more detailed assessments of capacity, compliance and constraints associated with the water and sewerage services at Port Arthur and surrounds Investigate the benefits/ dis-benefits of the potential transfer of that infrastructure to TasWater Factor into that analysis, the impacts of the Federal development at Port Arthur and the potential for other new accommodation to be established in that region near the Port Arthur Historic Site 	PAHS Tas Water	Large	Medium	Medium			
2	Consider options for irrigation schemes currently owned and operated by TasWater to be transferred to Tas Irrigation for the ongoing management of irrigation schemes. This may heighten the priority given to such schemes and improve coordination with irrigation more generally in the Coal River Valley	<ol style="list-style-type: none"> Determine the scale and scope of irrigation schemes current owned and operated by TasWater Undertake negotiations involving Tas Water, Tas Irrigation and other key affected stakeholder to determine an agreed way forward 	Tas Water Tas Irrigation	Moderate	Low	Medium			
3	Improved water and sewerage services to the Coal Mines heritage site. This would improve visitor amenity and allow that site to become a visitor destination that can be positioned and co-branded along side Port Arthur	<ol style="list-style-type: none"> Undertake initial investigations into the feasibility of providing water and sewerage services at the Coal Mines site. Factor that outcome into Tas Water's longer term asset management plans 	PAHS Tas Water	Moderate	Medium	Medium			
4	Continue to shore up and improve, water and waste water services to specific key regional employers such as, but not necessarily limited to: <ul style="list-style-type: none"> TASSAL (Triabunna facility) Ingham (Sorell facility) This study spoke with a small sample of such employers and there may be others.	<ol style="list-style-type: none"> Liaise with key employers to understand the nature of these constraints, recognising that water supply will be move available through to closure of the Chip Mill and impending closure of Seafish Support and advocate for such organisations in negotiations with TasWater, recognising this will largely be a matter for each organisation to progress 	Councils TasWater	Medium	Medium	Low			
5	Improve water and sewerage services to the southern beaches region	<ol style="list-style-type: none"> Undertake high level planning and feasibility assessment 	TasWater	Very Large	High	High			

No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
1	Investigate options for the provision of gas supply to the eastern shore including Rosny Park, Mornington Industrial Estate and Cambridge Industrial Park. This may stimulate new or different businesses that would benefit from this alternative source of energy	<ol style="list-style-type: none"> 1. Conduct discussion with potential providers to explore the costs and benefits of this proposition 2. Undertake further consultation with current and prospective businesses in and around the Cambridge Industrial Park to assess the potential demand for such energy 3. Develop pre-feasibility and business case documents if the concept has widespread support 	Clarence TasGas Networks	Very large	High	Medium - Low			
2	Upgrades to address black spot issues in Tasman and Glamorgan Spring Bay. Improved communications would improve resident and visitor amenity in the region. This could also potentially improve business safety and efficiency for organisations such as TASSAL that are becoming increasingly reliant on sophisticated telemetry and communications.	<ol style="list-style-type: none"> 1. Liaise with appropriate federal government authorities and communications providers to amply the case for investment in communications infrastructure 	DSG Tasman and GSB Councils	Large	High	Medium - High			

No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
Social infrastructure									
1	<p>Concepts have been proposed for regional recreation centres at Pembroke Park – Sorell and Seven Mile Beach-Clarence.</p> <p>These proposals could deliver improved and co-ordinated leisure and recreation facilities for residents in the south east region. However, the risk of duplication needs to be avoided.</p>	<ol style="list-style-type: none"> 1. Coordinate the objectives and plans of the Clarence and Sorell Councils to understand the target markets, usage patterns, demand drivers and pricing points for the proposed facilities. 2. Identify points of uniqueness and overlap and assess opportunities to develop a regional solution where such facilities are complimentary and not competing 3. Develop business cases as appropriate and position within the respective councils forward capital works programs 	Clarence and Sorell	Moderate	Medium	Medium			
2	<p>Develop other public/ social infrastructure to support growing visitor demands in townships. This would include, but not be limited to:</p> <ul style="list-style-type: none"> ■ Infrastructure to facilitate cruise ship visits to Spring Bay ■ improved streetscapes, gardens, tree plantings, foot paths etc. to be more appealing to visitors ■ Improved visitor centres with new branding and improved services at Triabunna, Swansea, Bicheno and Freycinet ■ Upgrades/ replacements of jetties, boat ramps etc. and improved supporting amenities such as parking, toilet facilities, fish cleaning areas ■ Improved public amenities such as 'loos with views', baby changing facilities etc. ■ Improved and more coordinated/ cohesive signage <p>Residents in the region would also stand to benefit from some of these improvements.</p>	<ol style="list-style-type: none"> 1. Develop a coordinated regional plan for the development of such social infrastructure/ public facilities in keeping with the principles of the Great Eastern Drive Touring Route 2. Provide annual funding through the budgetary process for each of the responsible organisations to undertake the upgrades over a reasonable timeframe 	<p>All Councils</p> <p>East Coast Tourism</p> <p>MAST</p>	Medium	Low	Medium			

No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
Social infrastructure									
3	<p>Continue to explore a range of measures that will address educational and child care challenges facing the region. Measures would include:</p> <ul style="list-style-type: none"> ■ Explore options to improve the perception and performance of the Sorell High School ■ Understand the rationale behind DOE projections that, it is claimed, would have Sorell with no change to the potential student numbers for 10 years ■ Investigate the merit of the Sorell High School being taken to year 11/12 ■ Investigate options to rebalance student numbers between in-zone and out-of-zone schools that are having adverse impacts on schools such as Cambridge Primary School ■ Investigate pre-school and after school care options at schools and in the community more generally 	<p>1. Continue to liaise with DOE to advocate for changes the education infrastructure and service levels that are beneficial to the region</p>	SERDA DOE	Low	Low - Medium	Medium			

No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
Industrial and commercial land/ airport									
1	<p>The availability of commercial/ industrial land for development is a significant regional strength. There is significant scope for construction of additional Infrastructure on appropriate commercial/ industrial land to support</p> <ul style="list-style-type: none"> Expanded growth in direct freight through Hobart Airport e.g. cool stores etc. Expanded services relating to Antarctica e.g. quarantine facilities etc. 	<ol style="list-style-type: none"> Undertake ongoing discussions understand demand forecasts, timeframes, requirements etc. for freight, logistics and other Antarctic support related infrastructure Develop business cases for facilities on a case by case basis Undertake any expansions in accordance with the Draft Airport Master Plan 2015 	<p>HIAPL,</p> <p>DSG-Antarctic Division</p> <p>Clarence</p>	Large	Medium	High			
Housing									
2	The Glamorgan Spring Bay Council has developed the Triabunna Marina Views Estate on council owned land. This presents an opportunity for council to complete the sub-division or sell the land to a developer. This would create 23 new homes in an appealing location to support the anticipated growth and development in the region	<ol style="list-style-type: none"> Continue to progress the development of the estate 	GSB	Moderate	Low	Medium			
3	The Glamorgan Spring Bay Council has commenced a process that will result in significant urban redesign at Triabunna. This should result in a significant 'makeover' of the township including layout, streetscapes etc.	<ol style="list-style-type: none"> Continue to progress the development of the Urban Redesign Plan Develop more detailed costing's for works and factor that into councils forward capital works plan 	GSB	Moderate	Medium	Medium - High			
4	<p>The availability of affordable residential land is a regional strength. For example, the Sorell Council has 1,118 approved sub-divided lots ready and available for construction of dwellings.</p> <p>However, this can contribute to pressures on other infrastructure networks, such as traffic between Sorell and Hobart, without improved job containment</p>	<ol style="list-style-type: none"> Continue to progress Sorell's residential development, but with regard to consequential impacts on regional infrastructure pressure points, notably traffic impacts, and other regional settlement plans 	Sorell	Large	Medium	High			

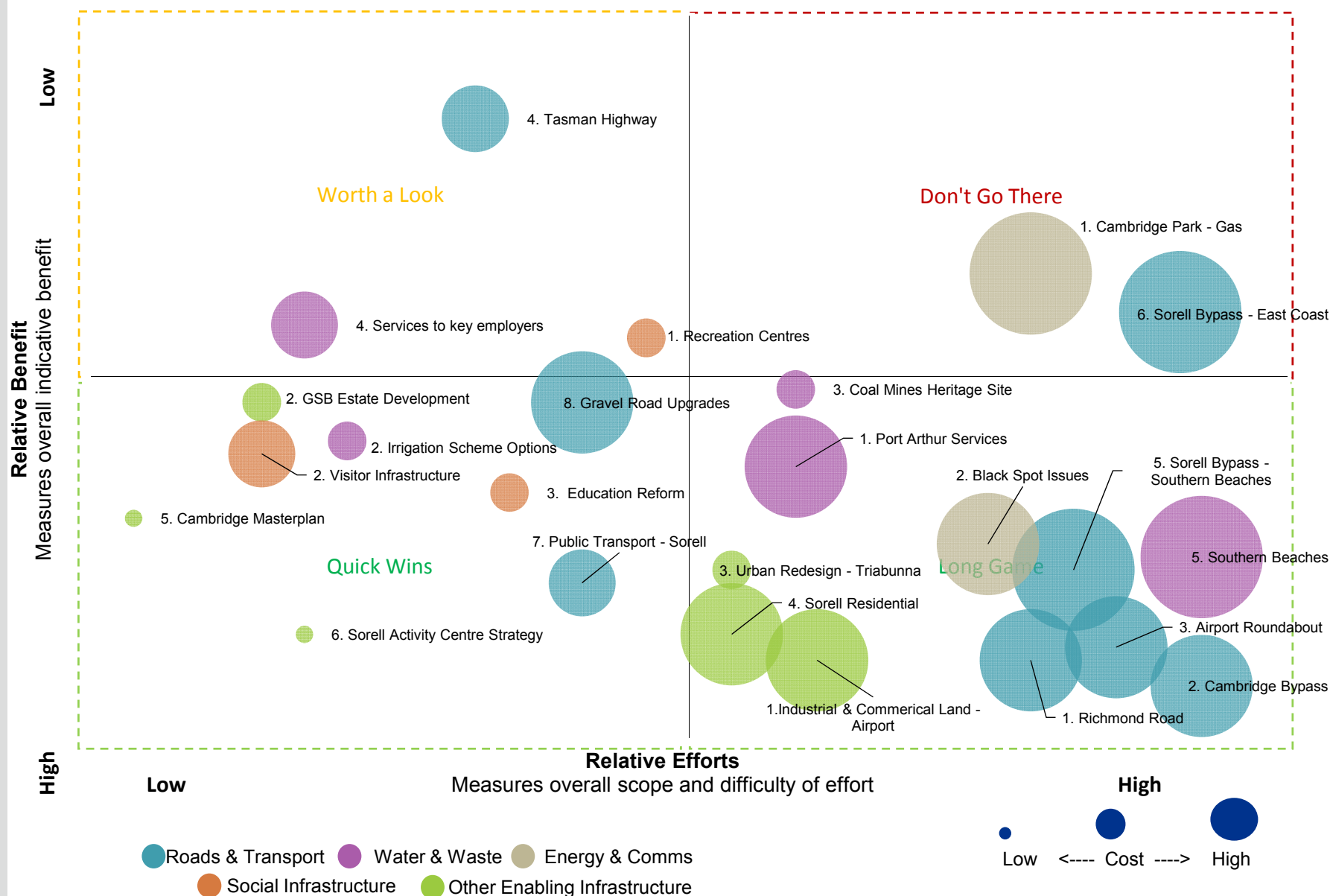
No.	Potential responses	Actions	Who	Capex	Effort	Benefit	Timeframe		
	The potential responses to the issues are...	The next steps are to...		Range	L,M,H	L,M,H	1-3	3-5	5-10
Housing									
5	Develop a Cambridge Master Plan including potential by-pass. Cambridge has emerged as the gateway to the Coal River Valley and the Cambridge Industrial Park and retail centre. The bypass would link the Richmond Road to the Acton roundabout. Further residential and commercial growth in and around Cambridge is likely and a Master Plan will guide such development.	1. Continue to progress the development of the Master Plan. This would also include the potential by-pass of that township. This is now approaching the stage where it will be released for public comment	Clarence DSG Roads	Low	Low	Medium			
6	Develop a Sorell Activity Centre Strategy. Sorell has emerged as the hub to a number of spokes of activity that converge through Sorell An Activity Centre Strategy would have regard to the range of economic drivers impacting the south east region and other potential responses such as public transport, by-passes etc. This would provide direction on which to base a range of other regional planning related decisions such as provision of social infrastructure, supply of new land for residential development, and supply of new land for commercial development.	1. Set aside an appropriation to fund the development of a Sorell Activity Centre Strategy 2. Engage consultants to undertake the development of the Sorell Activity Centre Strategy	Sorell	Low	Low	High			

Summary of potential responses

The Chart measures relative benefit on the y axis from high to low and relative effort on the x axis from low to high to capture the better projects lower down the chart in the quick wins and long game quadrants and ensure that any of the less desirable projects are captured in the Don't Go There quadrant out to the top right.

Projects of significant note in the Quick wins' quadrant that have lower relative effort and higher relative benefit include:

- **Residential/ housing - Sorell Activity Centre Strategy and Cambridge Master Plan** – complete consultations and embed into future decision making
- **Roads and transport - Sorell/ Cambridge Public Transport Solutions** – expand commuter bus services, construct park and ride infrastructure; undertake gravel road upgrades (Three Capes, Coal Mines)
- **Social infrastructure - Other visitor and resident focussed small scale infrastructure** – toilet amenities, jetties and boat ramps, parking etc. and initiatives to improve education infrastructure and services.



7. Other economic development enablers

What else may need to be done in relation to some of the other economic development enablers?

What else may need to be done in relation to some of the other economic development enablers?

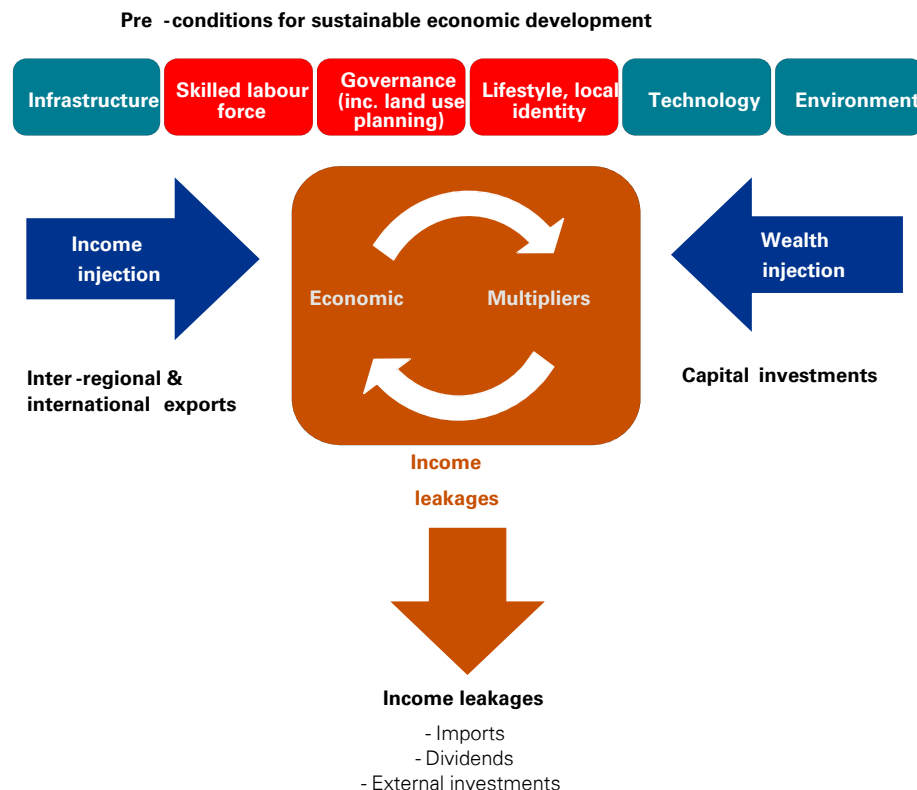
This section provides a brief commentary on some of the other ‘non-infrastructure’ economic development enablers.




These are not within the scope of this study, but in the course of undertaking our analysis and consultation, some observations have emerged that could deliver improved overall economic development outcomes in the region.

Using the pre-conditions for sustainable economic development as a guide, these observations relate to:


- Skilled labour force
- Governance
- Lifestyle/ health


Further discussion of these matters, including possible actions and assignment of responsibilities is provided in order to guide the next steps



No.	Emerging issues	Consequences	Strategies/ Actions	Who	Timeframe		
	The emerging issues are...	The implications of this are...	The next steps are to...		1-3	3-5	5-10
1	It was reported that 30% of farmers have not achieved minimum literacy standards nor adequate commercial/ business acumen to capitalise on the opportunities afforded by irrigation in the Coal river Valley	<ul style="list-style-type: none"> Water rights in the Coal River Valley have been purchased with no objective or plan as to how production can be maximised Irrigation infrastructure is not being effectively utilised 	<ul style="list-style-type: none"> Develop and/ or roll-out targeted programs that aim to address these issues 	DSG DOE TFGA			
2	It was reported that there remain skill deficiencies in jobs that support the tourism sector – food and beverage, hotel services, front-of-house etc.	<ul style="list-style-type: none"> Services levels to increasingly sophisticated and demanding visitors will not meet expectations and diminish the State's brand/ image Visitor numbers may not grow at expected rates if social media and other communication channels do not deliver consistent good reviews from visitors The stock of properties and experiences may not consistently improve at all levels below the more 'iconic' experiences resulting in an increasing gap between the top and lower end products and experiences 	<ul style="list-style-type: none"> Develop and/ or roll-out targeted programs that aim to address these issues 	DSG DOE TICT and related entities			
3	Trade Training Centres in the region have considerable capacity in relation to use of commercial kitchens and more general training facilities	<ul style="list-style-type: none"> Training and employment opportunities in the region are not being maximised 	<ul style="list-style-type: none"> Develop improved approaches to optimising VET and DOE programs with a view to increasing participation and utilisation of the Trade Training Centres* 	DOE TasTAFE SERDA			

* A Management Committee has recently been formed, Chaired by the Sorell Mayor.

No.	Emerging issues	Consequences	Strategies/ Actions	Who	Timeframe		
	The emerging issues are...	The implications of this are...	The next steps are to...		1-3	3-5	5-10
1	The rural remote areas of the south east experiences high levels of disadvantage in relation to key socio-economic indicators such as employment, education attainment, income etc. and health behaviours	These economic and lifestyle factors account for 70% of health outcomes in any given region, and poorer performance in these factors will have consequential impacts on health outcomes and put strain on health services and facilities	<ol style="list-style-type: none"> 1. Continue to work closely with the new Primary Health Network provider, TasPHN to effect change in the determinants of health 2. Ensure all health support services – GP's, multi-purpose centres etc. – remain appropriately scaled to deal with the foreseeable growth in economic activity driven by an expanding population, visitors and jobs 	SERDA			

No.	Emerging issues	Consequences	Strategies/ Actions	Who	Timeframe		
	The emerging issues are...	The implications of this are...	The next steps are to...		1-3	3-5	5-10
1	The SERDA is a cooperative governance model without a formal structure, regional vision or dedicated/ shared resources	Regional initiatives may not be able to be effectively progressed without dedicated resources that have a regional focus	<ol style="list-style-type: none"> 1. Consider and evaluate options to establish a more formalised and structured governance model 2. Consider and assess the merit of having a dedicated shared resource to advance economic development initiatives on a broader regional scale 3. Consider these options in the content of broader local government reform options – resource sharing and amalgamation 	SERDA			

Appendix A: Other socio-economic indicators

Occupation and industry profile by LGA

Industry growth share matrix by LGA

Tourism

Local Government Rankings

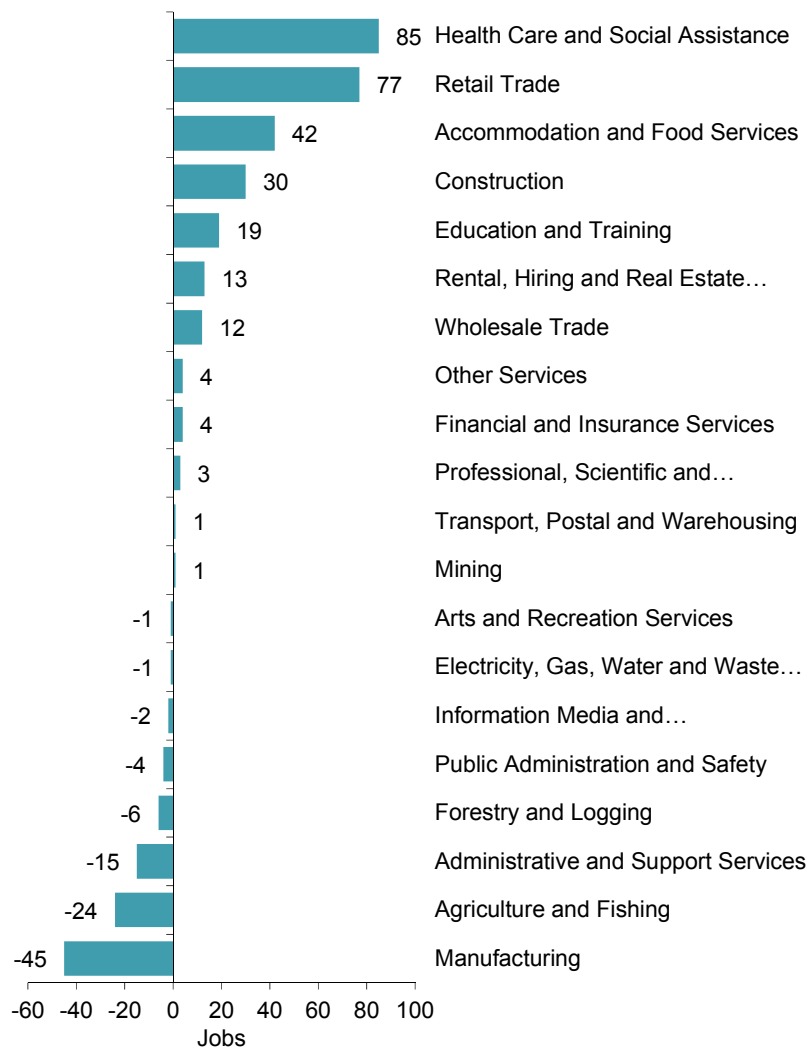
Appendix A Occupation and industry profile

The Charts represent the net movement in jobs by industry between the previous two census periods.

Clarence added the most jobs total when compared to the other regions. Clarence added the majority of its jobs in the Education and training and Utility Services

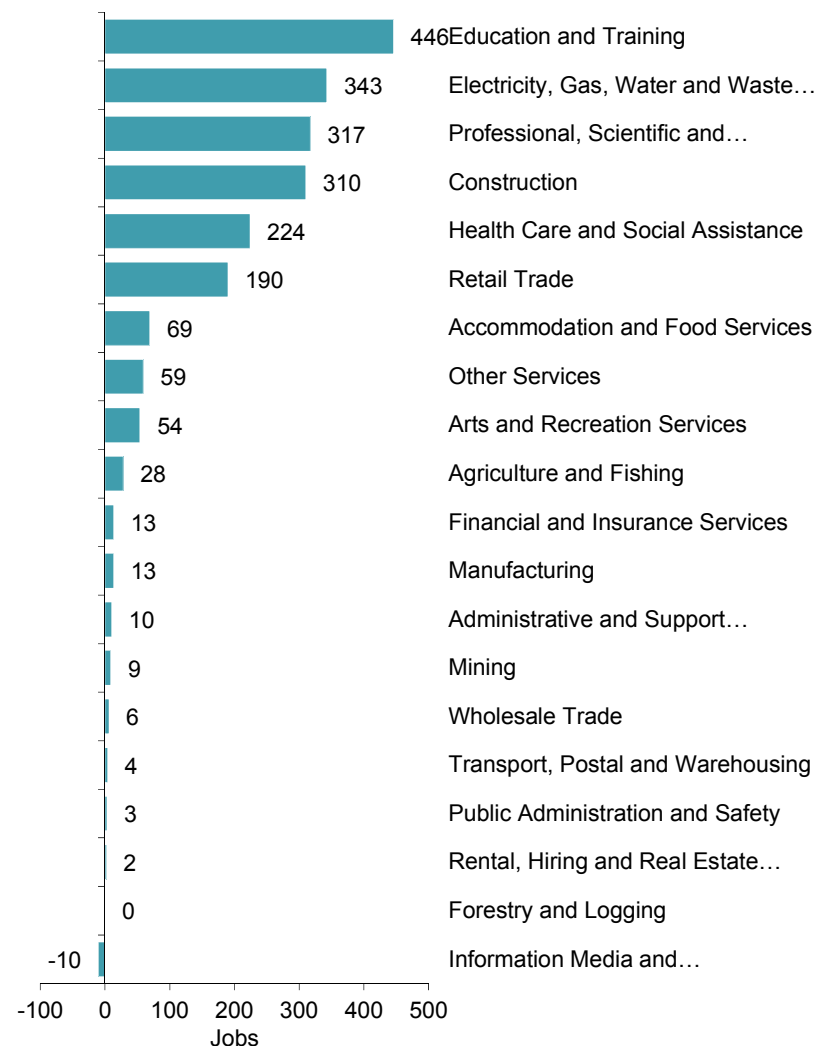
Sorell added jobs in the Health care, Retail and Accommodation services industries.

Sorell Change in Employment



ABS National regional profile by LGA (2007 & 2012)

Clarence Change in Employment



ABS National regional profile by LGA (2007 & 2012)

Appendix A

Occupation and industry profile

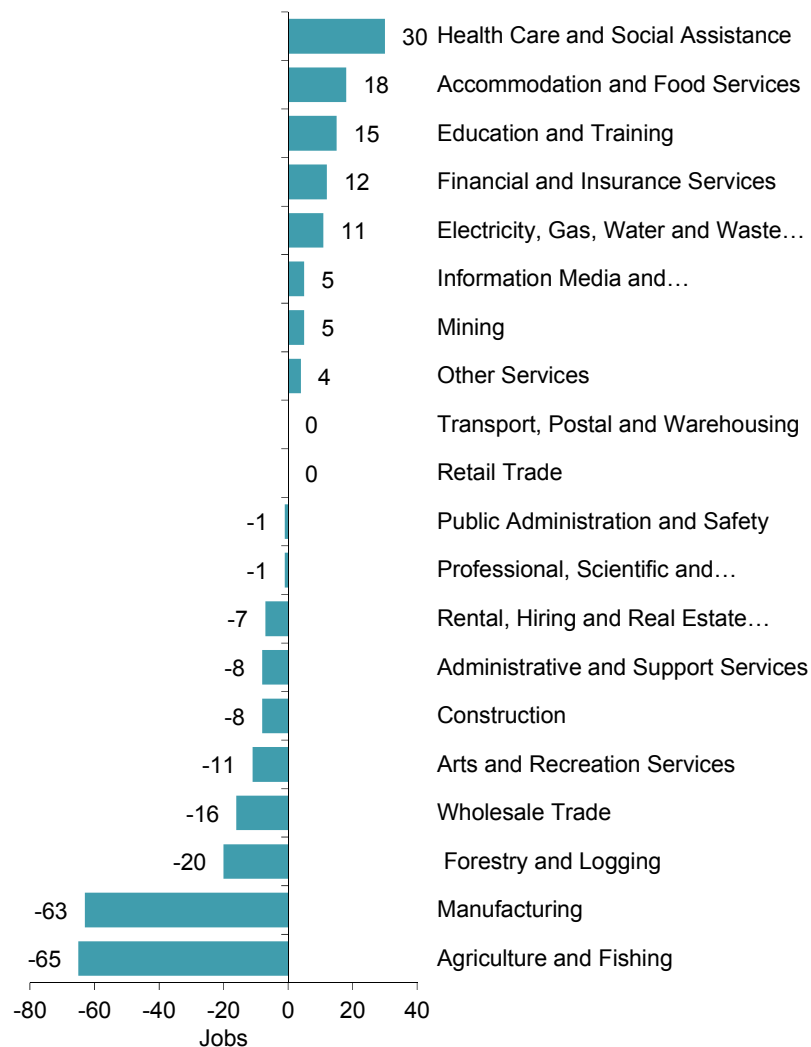
The Charts on this page and the previous page represent the net movement in jobs by industry between the previous two census periods.

Both the Tasman and GSB regions experienced a greater number of net job losses in industries than Sorell and Clarence.

Tasman and GSB both added the most number of jobs to their region through the Health care and social assistance industry.

Overall, across the entire SERDA region net jobs lost in the Manufacturing (-97) was the most significant. The most jobs added occurred in the Education and Training industry (483).

GSB Change in Employment



ABS National regional profile by LGA (2007 & 2012)

Tasman Change in Employment



ABS National regional profile by LGA (2007 & 2012)

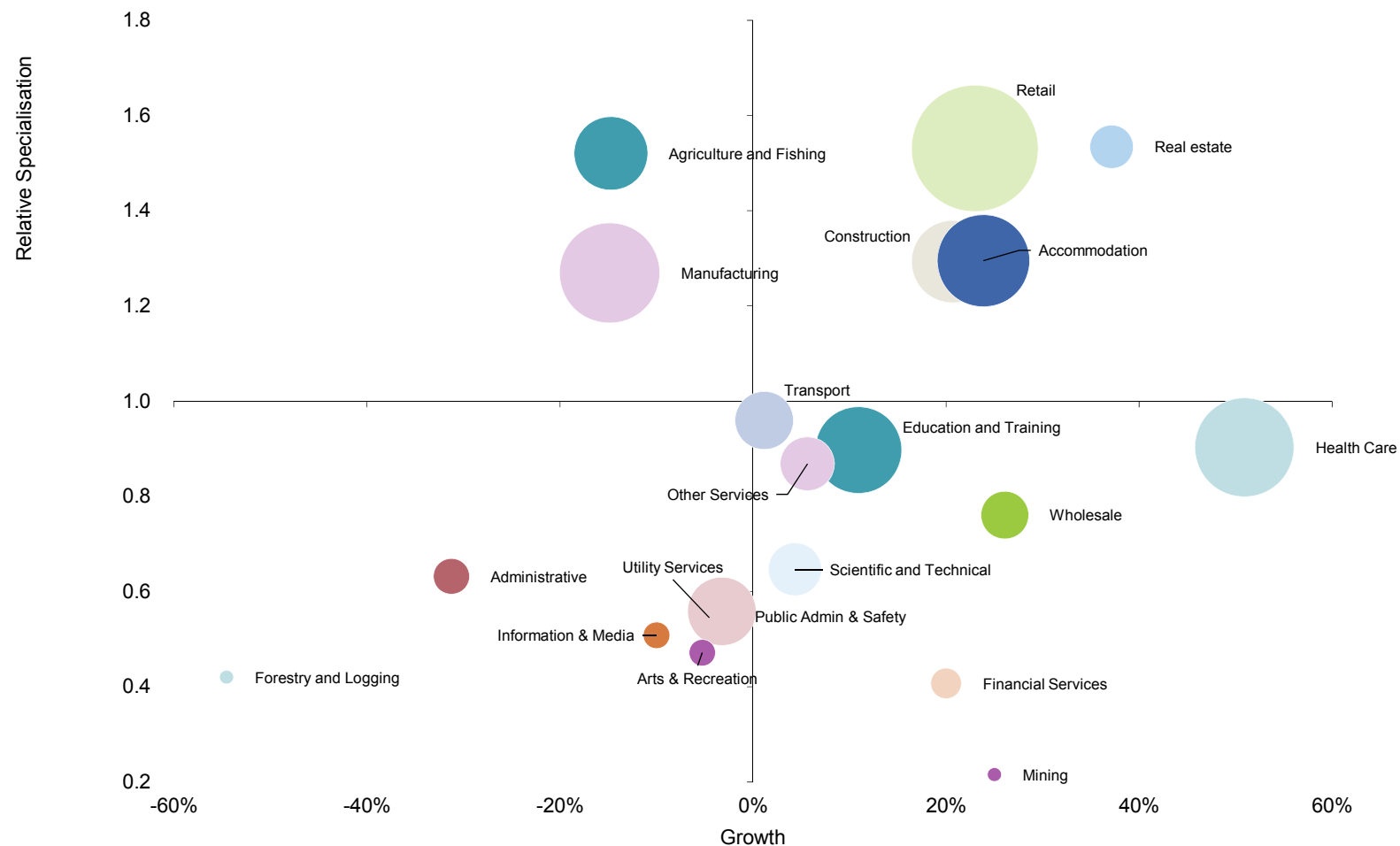
Appendix A

Industry growth share matrix

This chart points to the areas of growth and specialisation in Sorell.

- Real estate, retail, accommodation and construction scored highest in relation to specialisation and jobs growth.
- Retail is the largest employer in the region.
- Manufacturing and agriculture and fishing have a high rate of specialisation, however these industries are in decline, and have experienced negative jobs growth.
- Health care is also one of the highest employing industries, however the industry has a low level of relative specialisation. Education is also of a similar profile.

Sorell: Industry Growth Share Matrix



ABS National regional profile by LGA (2007 & 2012)

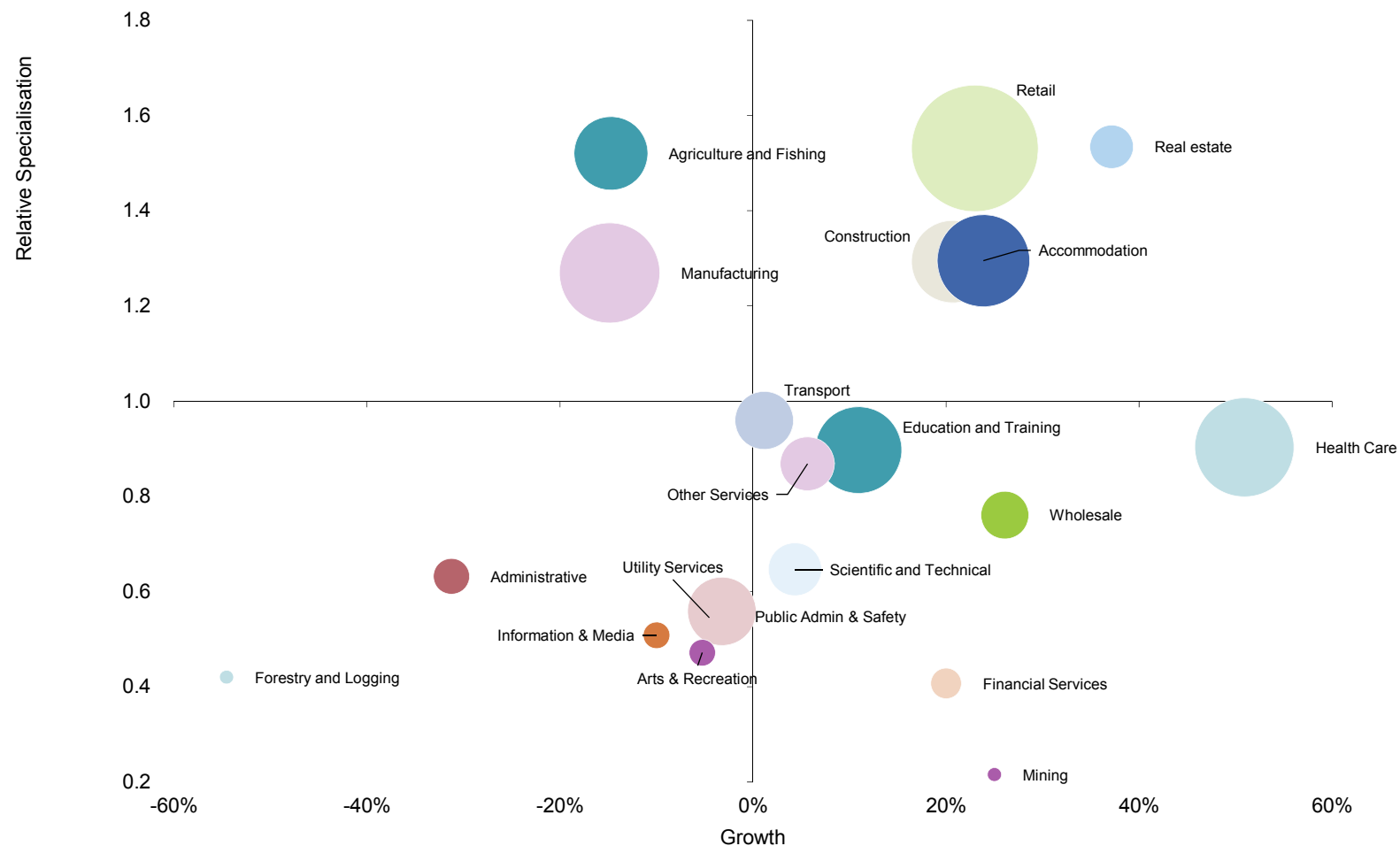
Appendix A

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Sorell: Industry Growth Share Matrix



ABS National regional profile by LGA (2007 & 2012)

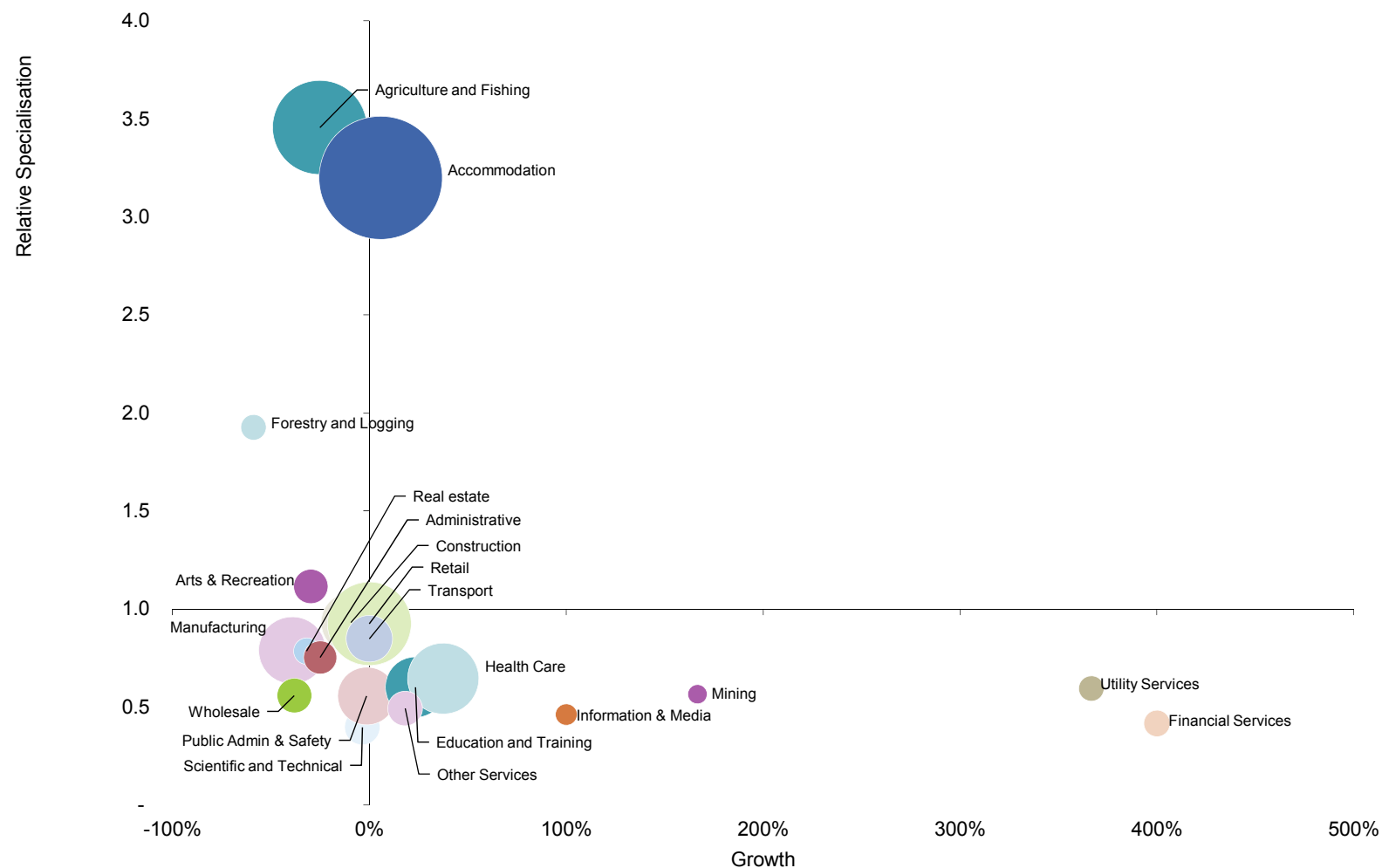
Appendix A

Industry growth share matrix

This chart demonstrates the relative industry growth for Glamorgan Spring Bay.

- Accommodation is the highest employer, and has moderate growth.
- Agriculture and fishing are the second largest employing industry, and has similar relative specialisation score, experienced a declining rate of growth.
- With the exception arts and recreation and the forestry and logging industry which has had a notable decline in the region, other industries in Glamorgan Spring Bay have a relatively low level of specialisation.

GSB: Industry Growth Share Matrix



ABS National regional profile by LGA (2007 & 2012)

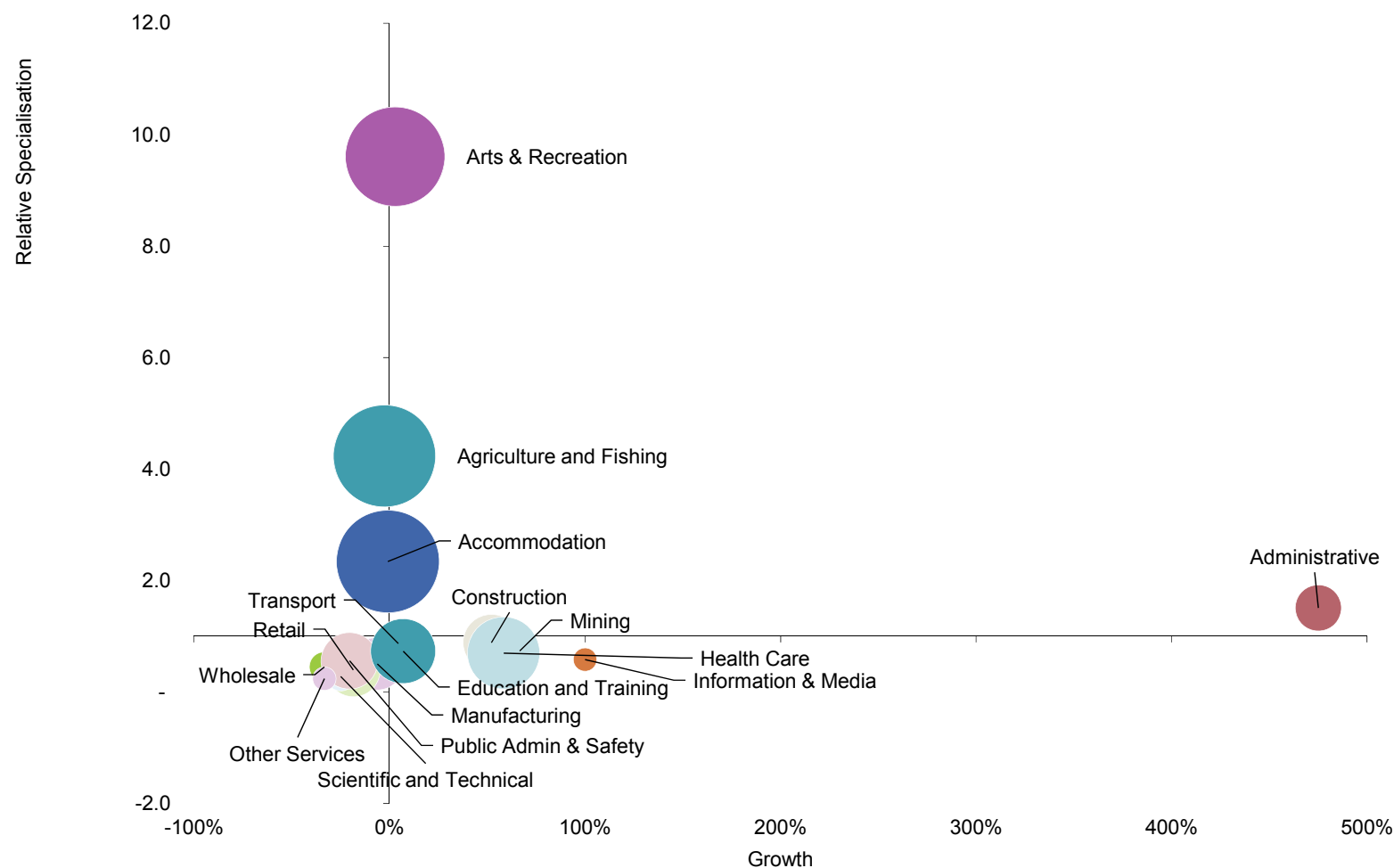
Appendix A

Industry growth share matrix

This chart indicates the nature of industry and employment in the Tasman region. In particular:

- Arts and recreation, Agriculture and fishing, and accommodation industries are all large and fairly equal employers in the region, experiencing a positive level of specialisation. However, growth in these sectors is stagnant.
- The administrative, construction, mining, health care and information and media sectors have experienced the greatest growth, yet there is a relatively low specialisation in these areas.

Tasman: Industry Growth Share Matrix



ABS National regional profile by LGA (2007 & 2012)

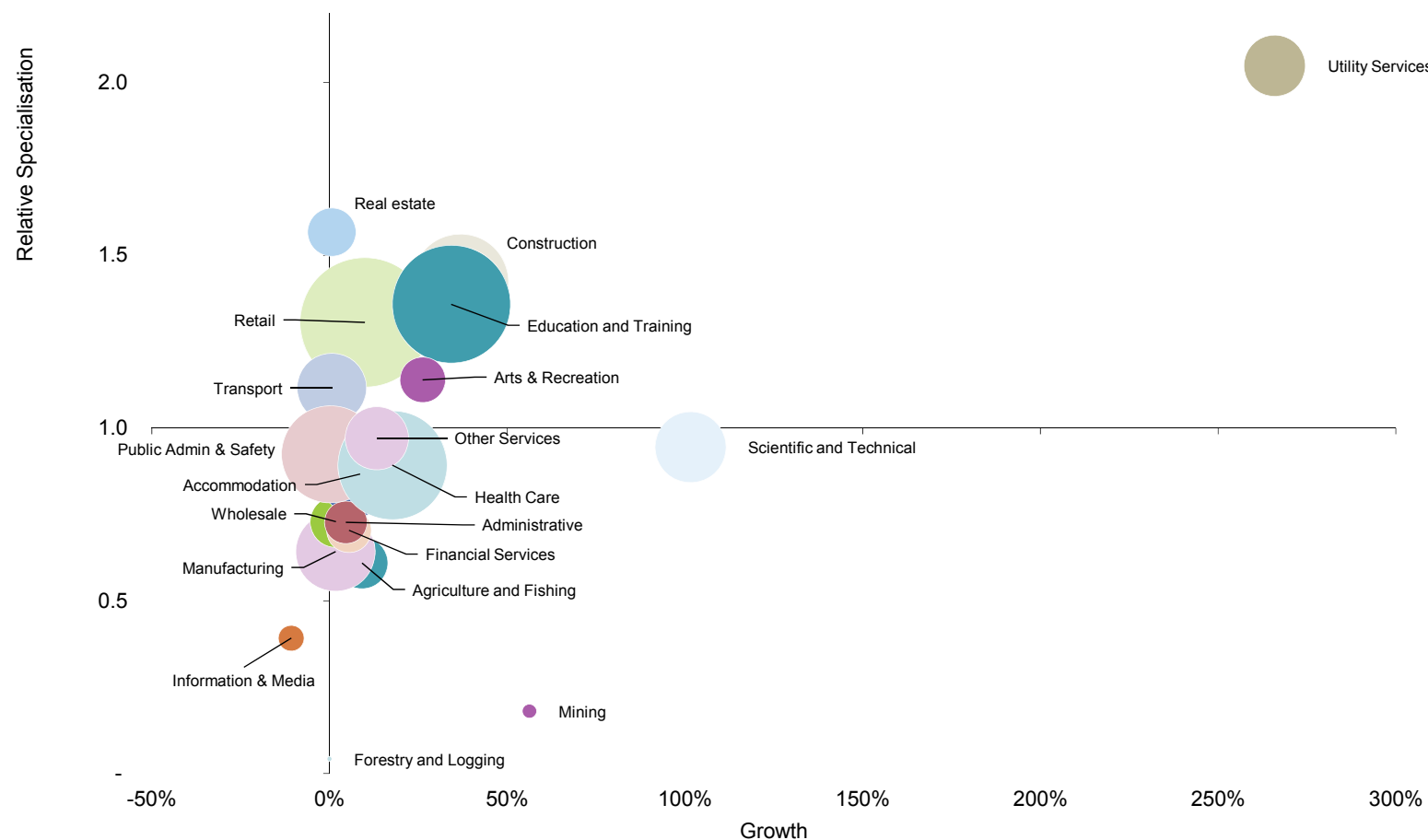
Appendix A

Industry growth share matrix

This chart indicates the nature of industry and employment in the Clarence region. In particular:

- **Utility services** have been the fastest growing industry, and is also highly specialised. This reflects the growth in housing and construction in the area.
- **Education and Training, Construction, Health and Retail** sectors are some of the largest employing industries in the area, and have experienced positive growth.

Clarence: Industry Growth Share Matrix

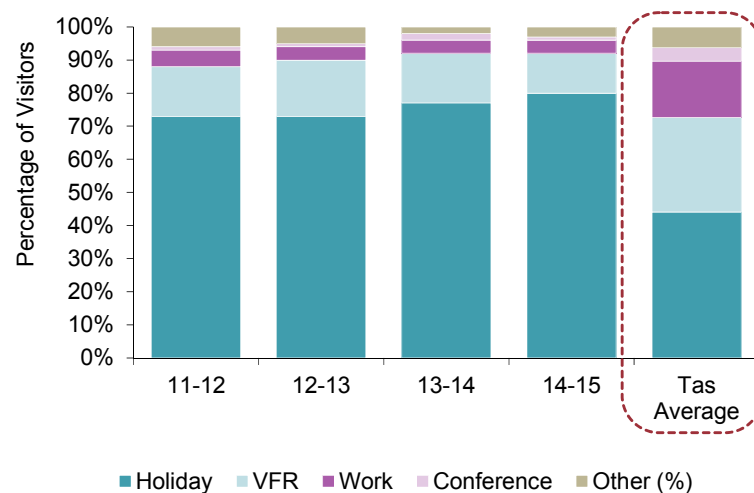


ABS National regional profile by LGA (2007 & 2012)

The charts to the right indicate the purpose of travel to the East Coast for visitors, and the origin of these visitors, from the period between 2011-2015. Most notably:

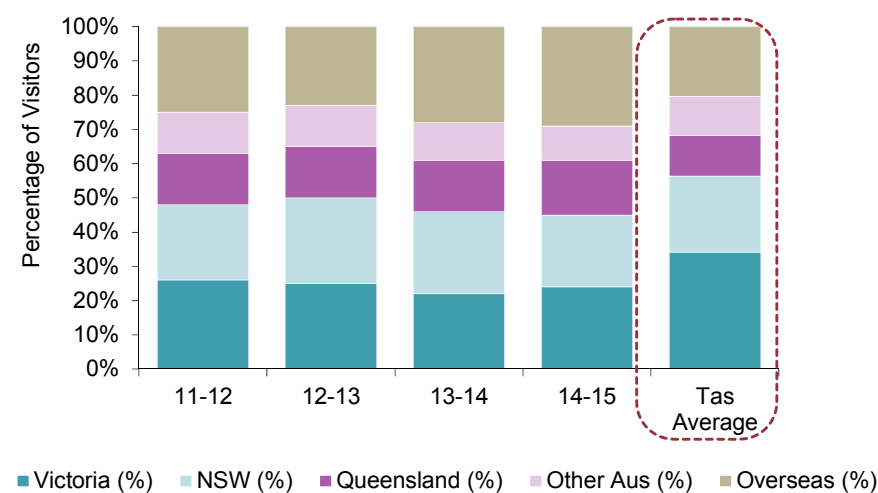
- The East Coast attracts a higher proportion (80%) of holiday visitors than the Tasmanian average (44%). As a result, there are proportionately less visitors coming for conference, work and other purposes.
- There has been a growing proportion of overseas visitors (22% to 29%), and a decline in the proportion of Victorian visitors (39% down to 32%) to the East Coast over the period.

Purpose of Travel - East Coast



Tas Visitor Survey (2015)

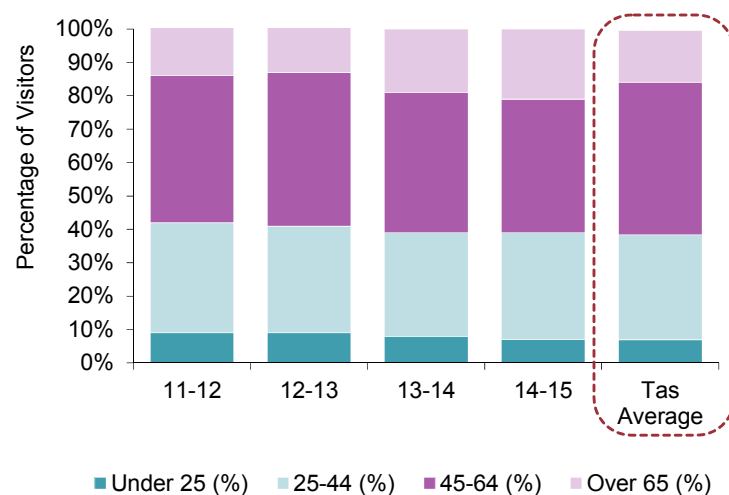
Visitor Origin - East Coast Holiday Visitors



Further analysis of tourism in the region indicates:

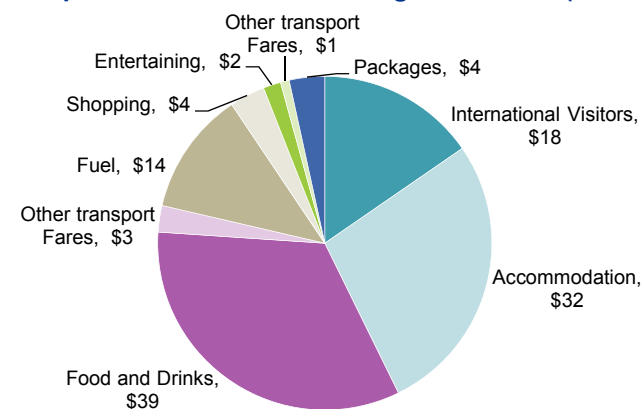
- The East Coast attracts a visitors across all age brackets. The visitor profile is fairly representative of all visitors to Tasmania, with only a slightly higher proportion of older visitors to the region.
- Expenditure in the region amounted to \$32 million on accommodation, and \$39 million on food and drink, which made up 52% of total expenditure on the East Coast in 2012-13.
- International visitors spent \$18 million of expenditure in the region, while domestic visitors contributed \$100 million.

Age Demographic - East Coast Holiday Visitors



Tas Visitor Survey (2015)

Expenditure in East Coast Region 2012- 13 (\$ Million)



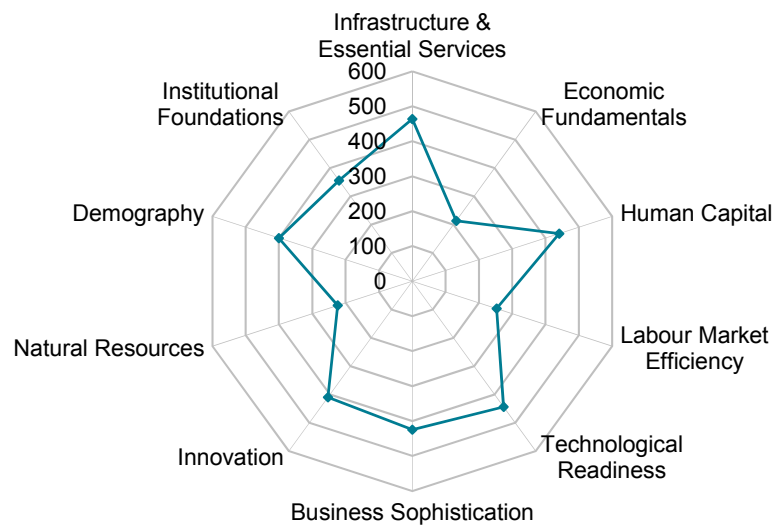
Tourism Research Australia

Appendix A Local Government Rankings

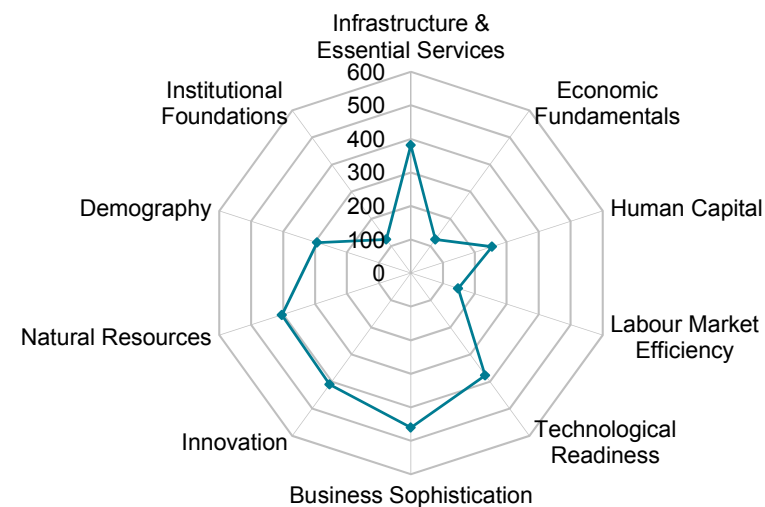
The spider charts indicate the relative rankings of each Council based on an Australia-wide ranking system, where the higher score is the better ranking.

These charts indicate that relatively, Glamorgan and Spring Bay and Tasman have lower scores in relation to the criteria, and Clarence and Sorell are better performers.

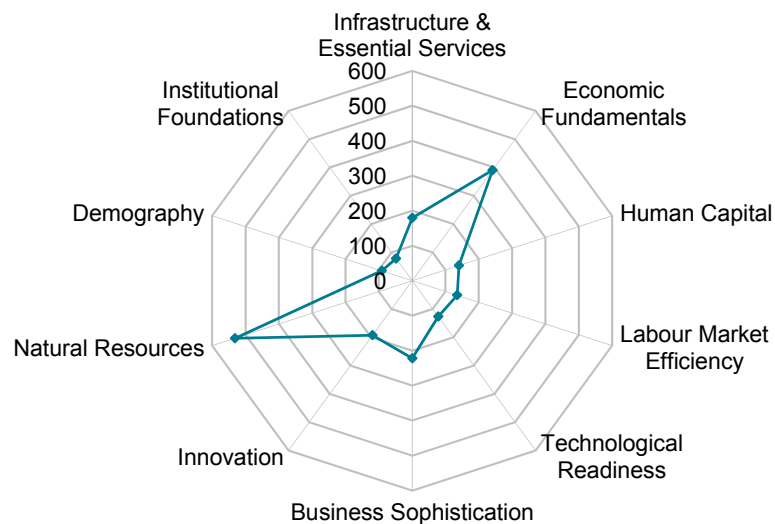
Clarence



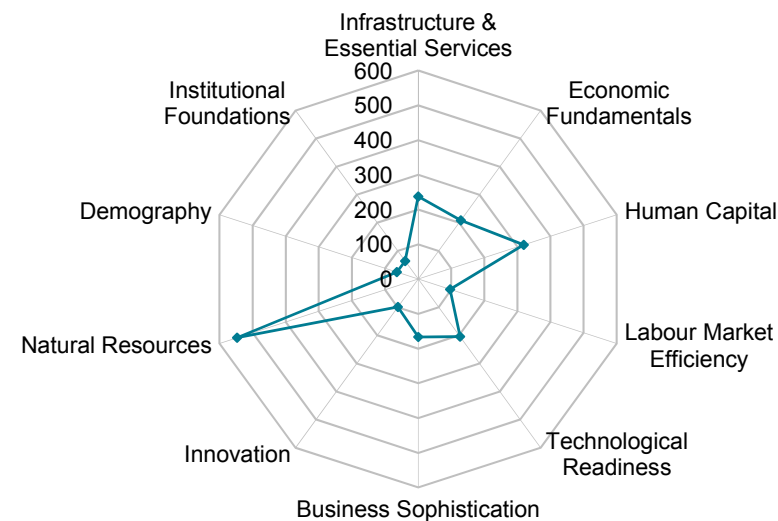
Sorell



GSB



Tasman



Economic Fundamentals

This includes measures such as business turnover, hours worked, building approvals, and value of commercial/industrial buildings.

The results indicate Sorell is the worst performing municipality. Further analysis into the data indicates that this is driven particularly by lower scores for the number of building approvals for non-residential property, and the lower value of industrial buildings.

Glamorgan-Spring Bay was the best performing municipality, driven by the greater value of commercial buildings and higher business turnover.

Infrastructure and Essential Services

This measure includes access to education and health services, as well as distance to airports and ports, as well as road and rail infrastructure.

Clarence ranked highest under this measure, largely reflecting its proximity to Hobart and the Greater Hobart region.

Scores for Glamorgan-Spring Bay and Tasman were largely influenced by access to technical or further education services, rail infrastructure, and distance to medical facilities.

Technological Readiness

This measure considers factors such as internet connectivity, the employment in IT-related industries and electronics, as well as mobile and broadband coverage.

Glamorgan-Spring Bay and Tasman municipalities are the worst performers under this measure, which reflects both population and their distance from the Greater Hobart region.

Demography

This measure reflects factors such as population size, growth rate, density, turnover, as well as young and senior dependency ratio.

Glamorgan-Spring Bay and Tasman were the worst performers under this measure, largely due to lower scores in population growth rate and senior dependency ratio. These municipalities ranked lower under the young dependency ratio.

Human Capital

This measure aims to capture the levels of qualifications of the population, as well as other factors such as health, English proficiency and lifelong learning opportunities.

Glamorgan-Spring Bay municipality was the worst performer under this measure. Whilst it had the second highest score in relation to technical qualifications (after Tasman), it had the poorest scores in relation to lifelong learning and the level of early school leavers and health.

Labour Market Efficiency

This measure reflects the unemployment rate, youth unemployment, levels of skilled labour, long term unemployment and welfare dependence.

The results from this analysis suggests that the South-East region is facing particularly challenging levels of unemployment across the municipalities, compared to the south of the State.

Clarence is ranked higher than the other municipalities, primarily due to a lower unemployment rate and greater proportion of skilled labour in the workforce.

Innovation

This measure reflects the levels of business start-ups, registered patents, and the number of research and development managers as well as employment in the science and technology sector.

The Tasman municipality is the worst performer under this measure, largely impacted by poor results in the level of patents and research and development managers.

Interestingly, Glamorgan-Spring Bay had the highest score in relation to the number of patents.

Business Sophistication

This measure reflects factors such as economic diversification, the level of exporters, importers and wholesalers, and access to local finance as well as business ownership.

Poorer results for Glamorgan-Spring Bay and Tasman were driven largely by scores for economic diversification and the levels of exporters, importers and wholesalers.

The results indicate that Tasman particularly faces challenges in regards to accessing local finance.

Natural Resources

This measure considers factors such as levels of agriculture, fishing and aquaculture, coastal access and national parks, as well as mineral, energy and timber resources.

Glamorgan-Spring Bay and Tasman share similar results, largely due to the level of national parks and the fishing and aquaculture industry.

Institutional Foundations

Institutional Foundations refers to the levels of volunteer activity, leadership and community skills base, as well as local government discretionary expenditure, and economic development support and the public workforce.

All of the municipalities performed well below the southern Tasmanian score, indicating some widespread challenges. These high scores are largely driven by local economic development support and leadership capacity.

Clarence performed slightly better than the other municipalities, largely due to lower scores in public service workforce, and community skills base.

Appendix B: Forward capital works plans

TasNetworks

TasWater

TasNetworks recently undertook works to strengthen the distribution network interconnection in the Eastern area. Due to the general radial nature of the network, single contingencies can cause widespread loss of supply. TasNetworks have upgraded the distribution network, including reinforcing feeders and installing remote switches, to allow them to restore supply to the majority of customers for a contingency on the transmission line from Palmerston Substation. TasNetworks also recently undertook work on the distribution network to the Tasman Peninsula. This area was severely affected by the Dunalley bushfires in January 2013. Following this TasNetworks rebuilt the two distribution feeders to the area; one immediately to restore supply and the second rebuilt with concrete poles to bushfire proof the line.

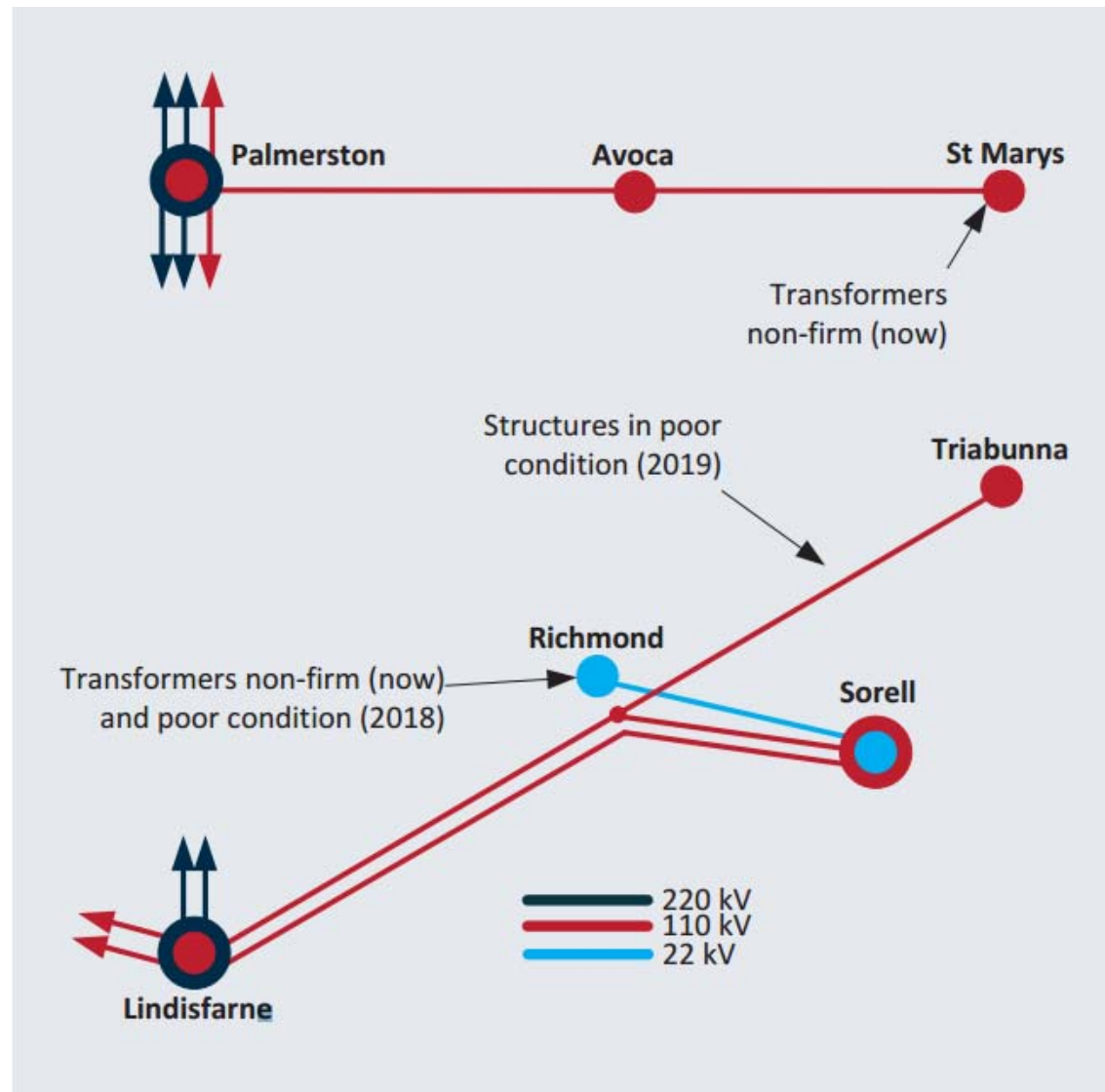
TasNetworks Annual Planning 2015 Summary

Project Status	Area	Description
Completed	Avoca and St Marys	Avoca and St Marys substations are supplied via the single circuit Palmerston–Avoca and Avoca–St Marys 110 kV transmission lines. There is no redundant supply to these substations, and though some load could be supplied from other substations, a contingency on these lines will result in loss of supply to the majority of customers. To reduce the impact of a fault on these lines, TasNetworks have strengthened the distribution network in the area. The work included upgrading some feeders and installing remote switching. This allows them to supply most of the affected load to neighbouring substations for a contingency on these lines. This project was completed in March 2015.
Committed	N/A	There are no committed projects in the Eastern area in the 2015 APR
Constraints and inability to meet network performance requirements	Richmond Zone	The maximum demand at Richmond Zone Substation in 2014 was 3.1 MVA; as such the regulating transformer at Richmond Zone Substation is currently overloaded during times of maximum demand. The supply transformers are operated above their continuous firm rating, however the cyclic firm rating is forecast to be exceeded from winter 2021. The supply transformers are of star-delta winding arrangement, resulting in a phase shift which prevents live load transfers to adjacent substations. In addition to the loading limitation, the transformers are approaching end of life. The supply transformers were manufactured in 1960, are in poor condition and are expected to reach end of life within the next five years.
	St Marys	No action – continue emergency load shedding scheme
Asset replacement	Triabunna	Issue with condition of Kay pole support structures with current estimates of a replacement of structures in 2019.
	Richmond Zone	Issue with condition of supply and regulating transformers with proposed solution to replace transformers in 2018.
Network capability improvement parameter action plan	Eastern Area	Conducted on the Palmerston–Avoca 110 kV transmission line at a cost of \$926,000 resulting in the benefit of reduced operational and safety risk and compliance with Australian Standards.
Communities with poor reliability	Midway Point, St Helens, Copping-Dunalley, Forestier Peninsula, Pirates Bay–Nubeena–Port Arthur, Tasman Peninsula Rural & Sorell	All listed communities have been trending poor performing communities except for Sorell which has been added to the list in 2014. The proposed solution for all areas is either under investigation or monitor except for St Helens which has been actioned to improve the reliability via a loop automation scheme.

<http://www.tasnetworks.com.au/TasNetworks/media/pdf/our-network/2015-Annual-Planning-Report.pdf>

Appendix B

Current and emerging issues in the Eastern area



<http://www.tasnetworks.com.au/TasNetworks/media/pdf/our-network/2015-Annual-Planning-Report.pdf>

Appendix B

TasWater program of works

TasWater's forward program of capital works over the next five years shows:

- Sorell will receive \$14-16 million of water and sewerage projects
- Clarence will receive \$20-22 million of water and sewerage projects

These projects are typically renewals and upgrades rather than significant new strategic projects.

Taswater Program of Works Expenditure by Municipality	15/16	16/17	17/18	18/19	19/20
Sorell - \$14-16 million of planned expenditure					
Sorell, Midway Point Strategy		✓	✓	✓	✓
Development: Sorell 250mm Water Main (* Subject to sub-division proceeding)		*			
Sorell Reservoir Outlet Duplication		✓	✓		
Development: Penna Rd - Wallace, 43 Lots rezone/subdivision (* Subject to sub-division proceeding)		*			
Boomer Bay Sewerage		✓			
Shark Point Road Trunk Renewal			✓	✓	
Sorell Reservoir Upgrade				✓	✓
Clarence - \$20-22 million of planned expenditure					
Cambridge Wet Weather Emergency Storage Capacity (1-2ML)	✓				
Cambridge Plant Process Improvements	✓	✓			
Lauderdale Sewerage Scheme - Stage 2	✓	✓	✓	✓	
Risdon Vale Leaks in aeration tank	✓				
Flagstaff Gully Dam - Filter Buttress	✓	✓	✓		
Rosny Odour Control System	✓	✓			
Rokeby Reservoir Bypass	✓				
Development: Clarence - Risdon Vale (* Subject to sub-division proceeding)	*	*	*		
Rokeby Effluent balancing basin		✓			
Rosny SPS Strategy			✓	✓	
Cilwen Road Reservoir inlet Main				✓	
Cambridge STP upgrade/rationalisation					✓

Appendix B

TasWater program of works

TasWater's forward program of capital works over the next five years shows:

- Tasman will not receive any water and sewerage projects
- Clarence will receive \$22-24 million of water and sewerage projects

These projects are typically renewals and upgrades rather than significant new strategic projects.

Taswater Program of Works Expenditure by Municipality	15/16	16/17	17/18	18/19	19/20
Tasman					
Nil					
Glamorgan Spring Bay - \$22-24 million of planned expenditure					
Orford STP Outfall Upgrade	✓				
Development: Bicheno - Reticulation Capacity increase - Bicheno Golf Club & subdivision 61 lots (*Subject to sub-division proceeding)	*				
Orford WTP renewal	✓				
Triabunna Water Supply Reticulation Reservoir Project	✓	✓			
Orford Sewage Pump Stations & Network Upgrade	✓	✓	✓		
Orford Lower Prosser Dam Storage Works	✓	✓			
Swansea Clay Liner	✓	✓			
Bicheno STP Upgrade		✓			
Development: Orford - Louisville Road -Solis Development (* Subject to sub-division proceeding)	*				
Lower Prosser Dam- Safety Upgrade		✓	✓		
Swansea STP upgrade (Reuse Dam)		✓			
Triabunna aeration		✓			
Bicheno Water Supply Upgrade		✓	✓	✓	
Orford Lower Prosser Reservoir Chemical Spill Protection			✓	✓	
Coles Bay (S) - Full ht filter buttress				✓	✓

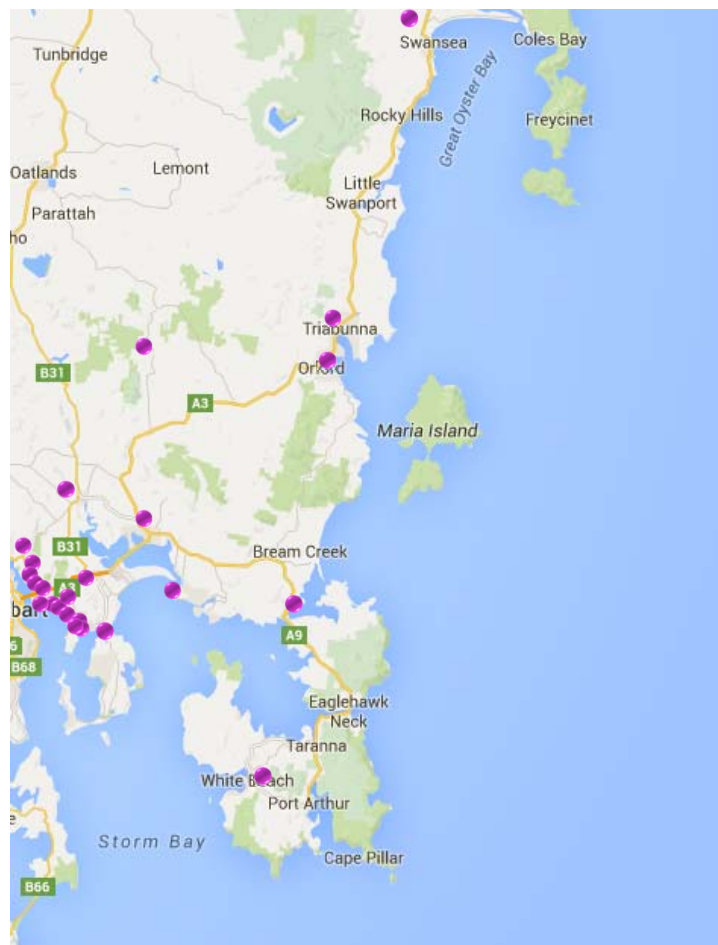
Appendix C: Health, education and aged care facilities

Education facilities – government only

Health and aged care facilities

Appendix C

Education facilities – Government Schools

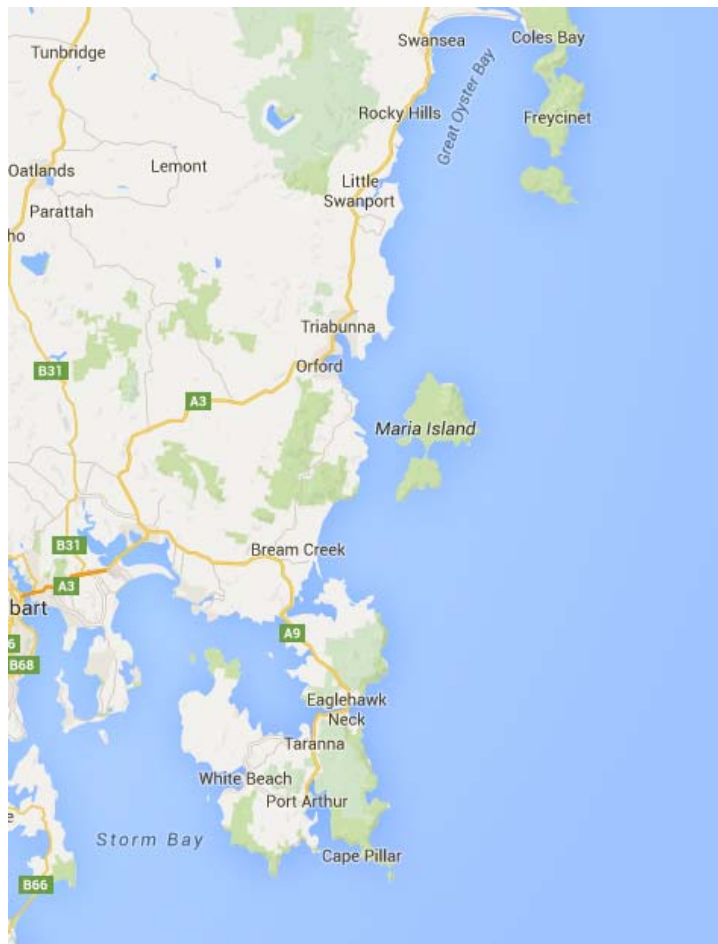


● School locations

School	Council Region	Years
Swansea Primary School	Glamorgan-Spring Bay	Primary
Triabunna District High School	Glamorgan-Spring Bay	Secondary
Orford Primary School	Glamorgan-Spring Bay	Primary
Dunalley	Sorell	Primary
Dodges Ferry Primary School	Sorell	Primary
Sorell School	Sorell	Combined Primary and Secondary
Cambridge Primary School	Clarence	Primary
Richmond Primary School	Clarence	Primary
Risdon Vale Primary School	Clarence	Primary
Lindisfarne North Primary School	Clarence	Primary
Lindisfarne Primary School	Clarence	Primary
Rose Bay High School	Clarence	Secondary
Montague Bay Primary School	Clarence	Primary
Bellerive Primary School	Clarence	Primary
Rosny College	Clarence	College
Clarence Primary School	Clarence	Primary
Clarendon Vale Primary School	Clarence	Primary
Rokeby High School	Clarence	Secondary
Rokeby Primary School	Clarence	Primary
Lauderdale Primary School	Clarence	Primary
Tasman District School	Tasman	Primary

Appendix C

Health and Aged Care facilities



Aged Care Service Provider	Council Region
Bowditch Hostel	Clarence
Care Assess Community Aged Care Packages	Clarence
Freemasons Homes Of Southern Tasmania	Clarence
May Shaw Health Centre	Glamorgan Spring-Bay
May Shaw Health Centre Community Aged Care Packages	Glamorgan Spring-Bay
May Shaw Hostel	Glamorgan Spring-Bay
May Shaw Nursing Home	Glamorgan Spring-Bay
Oakdale Services: Ageing in Place	Glamorgan Spring-Bay
Parkside Brokerage	Clarence
Presbyterian Homes Hobart	Clarence
Presbyterian Homes Hobart - Community Services	Clarence
Presbyterian Homes Hobart - EACH Dementia Services	Clarence
Queen Victoria Home Community Care - CACP Service	Clarence
Queen Victoria Home Community Care - EACH Service	Clarence
South Eastern Community Care EACH	Sorell
South Eastern Nursing & Home Care Association Inc Community Aged Care Packages	Sorell
Fairway Rise residential facility and village	Clarence
Tasman Health & Community Service	Tasman
The Queen Victoria Home	Clarence
Uniting Aged Care - Southern Tasmania CACPs	Clarence
Uniting Aged Care - Southern Tasmania EACH	Clarence
Uniting Aged Care - Southern Tasmania EACHD	Clarence
Uniting AgeWell Lillian Martin	Clarence
Uniting AgeWell Ningana	Sorell



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