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Northern Tasmania Regional Profile



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Photos:

Front cover (left to right from top) – Jeff Jennings (Dorset Council); Break O’Day Council; Break O’Day Council; West Tamar Council; Launceston City Council; West Tamar Council; Break O’Day Council; George Town Council; Meander Valley Council

Liveability – West Tamar Council; Sustainability & resilience – Roger McLennan (Dorset Council); Competitiveness & innovation – George Town Council; Points of interest – Launceston City Council

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Introduction

The Northern Tasmania Regional Profile has been prepared for the Northern Regional Planning Project Management Committee. The purpose of this report is to assist in constructing an evidence base to inform the ongoing strategic development of the Regional Planning Project.

This project has been undertaken by the Institute for Regional Development (IRD), University of Tasmania. The two IRD researchers are Karen Eyles and Dr Tony McCall.

The regional profile identifies the key economic, environmental, resource management, social factors and timeline trends that influence the future of Northern Tasmania and its communities.

This Regional Profile links the data sets that are available to the three platforms that shape regional planning decision-making in the 21st century: Liveability; Sustainability and Resilience and; Competitiveness and Innovation.

These three platforms formed the theme areas for the Northern Tasmania *Regional Planning Discussion Paper* that sought stakeholder feedback and support in 2009-2010.

Northern Tasmania: Regional Profile

Northern Tasmania comprises about a third of Tasmania's land mass and in 2006 had an estimated population of around 140,000.

The area of Northern Tasmania aligns with the areas of the eight Northern Tasmanian Councils: Break O'Day, Dorset, Flinders, George Town, Launceston City, West Tamar, Meander Valley and Northern Midlands.

Northern Tasmania has emerged as a business hub and the centre for a growing regional population based on its economic, competitive and natural advantages that include:

- ◆ abundance of natural resources including a mild temperate climate, reliable rainfall, clean air, rich fertile soils and an unspoilt natural environment;
- ◆ ideal growing conditions for pasture and cropping that support adaptive, flexible agriculture and dynamic viticulture;
- ◆ wide and diverse industry base with competitive business costs that have attracted international and national companies to the region;
- ◆ skilled and stable workforce attracted by diverse job opportunities and extensive cultural and recreational activities; and
- ◆ statewide transport and distribution hub with Launceston less than three hours drive to all parts of Tasmania.

Key business sectors include:

- ◆ aquaculture and fishing;
- ◆ food and beverages;
- ◆ agriculture;
- ◆ forestry and timber;
- ◆ manufacturing;
- ◆ ship-building;
- ◆ tourism.

(Source: NTD and DED regional profiles)

Regional communities, such as Northern Tasmania, are in a competition to attract mobile people and workforces to their regions. This is a global competition that requires consideration at a policy level to constructing advantage, not merely relying on comparative advantage.

Constructing advantage requires the development of policy platforms at a regional level.

The regional planning discussion paper and proposed policy framework *Towards a Regional Planning Strategy for Northern Tasmania* (North Plan, 2009) draws on the international policy planning and regional development literature in suggesting that three platforms are critical in identifying regional planning challenges and opportunities: economic competitiveness and innovation; liveability and; sustainability and community resilience.

These platforms reflect a new emphasis in regional planning and economic development – the significance of people, as well as industry - as drivers of sustainable development in the 21st century. People-meters are just as important as industry-meters in placing regions in a position where they can attract mobile professionals with their skills and knowledge to invest, live and work in regions. The choices people make will help shape the prospects of constructing advantage at a regional level. This competition is global and it is a full-on contact sport. It requires data, analysis, forecasting and scenario-building to place regions in a position where they can bid for the choices mobile workforces and investors make in the 21st century.

Regions face one collective policy challenge: how can we attract people to live, work and invest in our region? The choices made can significantly influence the sustainability of a region into the future.

Regional communities retain many of the attributes that will allow them to respond positively to the challenges and opportunities confronting them in the 21st century. They are innovative. Liveability and community resilience are often competitive advantages. But, the complexity of factors that will determine the longer-term sustainability of communities needs to be better understood and acknowledged so that regional planning is informed by evidence that allows for better understanding and clearer strategic responses in constructing advantage at a regional level.



Liveability

Liveability

Liveability refers to the quality of life a particular region can offer and its relative attractiveness as a place to live (*North Plan*, 2009). Liveability is a critical determining factor for investment, living and working choices.

Land-use planning decisions influence liveability. Constructing advantage at a regional level requires significant recognition of the importance of liveability factors in shaping the future sustainability and resilience of our regional communities.

In this section, population and socio-economic characteristics of the region provide contextual information. Data related to four aspects fundamental to liveability are then explored in further detail:

- ◆ availability and affordability of housing;
- ◆ accessibility;
- ◆ acceptance; and
- ◆ amenity and lifestyle.

Context

Where are people living and how is it changing?

In 2006, the population of the Northern region was 133,929, approximately 28% of the population of Tasmania.

Population change

During the period 1996-2006 Tasmania gained a net 11,940 residents, while the Northern region gained 3,068. However, as can be seen in **Error! Reference source not found.** this was due to net gains in 2001-2006 offsetting the net losses experienced in 1996-2001. **Error! Reference source not found.** also details the changes in population for SLAs during this time period.

- ◆ Only six of the 14 Northern SLAs experienced a similar pattern of net loss in 1996-2001 and net gain in 2001-2006, as the region and the state.
- ◆ Of the remaining eight SLAs, four SLAs gained population during both intercensal periods (Meander Valley (M) – Pt A, Northern Midlands (M) – Pt A, and West Tamar (M) – Pt A and Pt B); three SLAs lost population during both periods (Dorset (M), Flinders (M), and Launceston (C) – Pt C); and George Town (M) – Pt B gained in 1996-2001 and lost in 2001-2006, although these were small numbers.
- ◆ Eight SLAs gained population overall from 1996 to 2006, and six SLAs lost population overall.
- ◆ Launceston (C) – Pt B regained net population loss of 1,502 in 1996-2001, with a net gain of 1,566 in 2001-2006.
- ◆ Meander Valley (M) – Pt A had the highest population growth by number in the region (1,511) between 1996 and 2006, followed by West Tamar (M) – Pt A (930). Meander Valley (M) – Pt A's population growth mainly occurred in 1996-2001, whereas growth in West Tamar (M) – Pt A mainly occurred in 2001-2006.

Rates of population change

Rates of population change for these time periods are mapped in **Error! Reference source not found.**, showing the magnitude of population gains/losses relative to the base population.

- ◆ In 1996-2001 most SLAs lost population as did Tasmania and the Northern region overall. Only some SLAs peripheral to Launceston had minor gains, with Meander Valley (M) – Pt A gaining more than 10% over the 5 year period.
- ◆ 2001-2006 saw a turnaround with Tasmania and the Northern region gaining population, as did the majority of SLAs with Break O'Day (M),

Northern Midlands (M) – Pt A, Meander Valley (M) – Pt A, and West Tamar (M) – Pt A and Pt B gaining at the highest rate. However, SLAs in the Northeast had declining populations, as they did in 1996-2001 except for George Town (M) – Pt B.

- ◆ The third map in **Error! Reference source not found.** reveals the spatial distribution of total change over the ten year period 1996-2006 with Tasmania and the northern region gaining. Overall more rural SLAs (Dorset (M), Launceston (C) – Pt C, Northern Midlands (M) – Pt B, Meander Valley (M) – Pt B) lost population during the decade with the exception of coastal 'resort'-type destinations such as Break O'Day (M) and George Town (M) – Pt B. Those SLAs closest to Launceston and the Tamar River gained population during the decade.

Population distribution by settlement size

Of the population change experienced in the Northern region, how is it related to settlement size? Aggregating population data for the region by settlement size: localities (population 200-1,000), mid-size centres (population 1,000-5,000), and the major centre of Launceston (population over 50,000); and for the rural balance (**Error! Reference source not found.** and **Error! Reference source not found.**) will reveal any patterns related to settlement size.

- ◆ From **Error! Reference source not found.** it appears that all size settlements increased their share of the Northern region population between 1996 and 2006, at the expense of the rural balance. However, this is based on data comprising all settlements > 200 people for *each* Census year. This includes settlements that may have had less than 200 residents in 1996 and/or 2001 but reached the ABS minimum population of 200 by 2006 and thus are included as localities subsequent to reaching this minimum.

- ◆ **Error! Reference source not found.** only includes those settlements that were of minimum size of 200 residents and were included as localities in 1996. This shows that while the rural balance still decreased its share of the region's population, it was a smaller loss than it appears from **Error! Reference source not found.**.
- ◆ Localities also maintained their share of regional population rather than increased once those that only became localities during the decade are omitted. Mid-size centres also remained stable. The big winner in share of the population was the major centre of Launceston.

Population distribution by settlement size for SLAs

The great majority of SLAs show similar trends to the Northern region as a whole in population change by settlement size (see **Error! Reference source not found.** and **Error! Reference source not found.**) - with declining population numbers for rural balance; stable for localities; and stable or minor increase for mid-size centres from 1996-2006.

- ◆ Exceptions to this were Break O'Day (M) and Northern Midlands (M) – Pt A which increased rural balance populations, as well as population of mid-size centres. Both these SLAs gained in overall population during the decade 1996-2006.
- ◆ George Town (M) – Pt A was the other exception as the population of the rural balance increased and the population of mid-size centres decreased, with the SLA taken as a whole losing population.

Population change for settlements

Fortunes in the population growth stakes were mixed for individual settlements within each SLA. The magnitude of changes in population numbers are provided in **Error! Reference source not found.** for each settlement shown in the location map (**Error! Reference source not found.**).

- ◆ Break O'Day (M) and Northern Midlands (M) – Pt A experienced growth in all settlement size classes (as seen in **Error! Reference source not found.**), yet looking at individual settlements reveals that Break O'Day's only mid-size centre St Helens gained population, but of the three localities only Scamander gained while St Marys and Fingal lost population. No pattern is evident in growth/decline by settlement size for individual settlements.
- ◆ Similarly, for Northern Midlands (M) – Pt A overall there was an increase in population of mid-size centres, however of these Evandale experienced a small decrease in population whereas Longford and Perth increased.
- ◆ Localities in the region that recorded negative population change between 1996-2001 included the following that had negative change across both 1996-2001 and 2001-2006: St Marys, Break O'Day (M); Ringarooma, Dorset (M); Lilydale, Launceston (C) – Pt C; Beauty Point, West Tamar (M) – Pt A and; Bracknell, Meander Valley (M) – Pt A.
- ◆ Localities in the region that recorded negative population change in the period 2001-2006, but not in 1996-2001 were: Bridport, Dorset (M); Gravelly Beach, West Tamar (M) Pt A and; Evandale, Northern Midlands (M) – Pt A.

Rate of population change for settlements

Rates of population change for settlements and the rural balance of each SLA are mapped in **Error! Reference source not found.** and **Error! Reference source not found.**. The city of Launceston comprises all or part of four SLAs – Launceston (C) – Inner; Launceston (C) – Pt B; Meander Valley (M) – Pt A; and West Tamar (M) – Pt A. Therefore, these SLAs have been combined (Launceston Combined) to determine the population of the rural balance, that is, the population that is not resident in a settlement with a population of 200 or more.

- ◆ In 1996-2001 the rural balance of the Northern region as a whole declined in population. The rural balance of SLAs generally experienced minor losses, with losses more severe in the Northeast corner – Dorset and Flinders – and for Launceston Combined.
- ◆ In 1996-2001, no readily distinguishable patterns of gain/loss are apparent for settlements, but generally settlements more distant from Launceston experienced losses (mostly inland or around the mouth of the Tamar River) except for the coastal 'resort' holiday communities of St Helens, Scamander and Bridport. Settlements closer to, and including, the major centre of Launceston increased their populations at rates of up to 10% over the 5 year period.
- ◆ In 2001-2006, the rural balance of the region continued to lose population overall. Rural balance of SLAs generally experienced minor losses but with a few SLAs gaining. Those SLAs that gained were not the same SLAs that gained in the previous intercensal period.
- ◆ For settlements there was generally an increase in population in 2001-2006 – more so than in the previous period. Only a few localities lost population and one mid-size centre – Bridport. Population losses in Bridport may be, at least in part, the result of homes that were previously primary residences being purchased as holiday homes, therefore effectively reducing the permanent resident population in the town.
- ◆ **Error! Reference source not found.** shows the combined effect of population change over the decade, 1996-2006. Generally the rural balance of SLAs experienced losses with the exception of a few within accessible distance of the city of Launceston, and Break O'Day (M).
- ◆ Over the decade 1996-2006, settlements experienced mixed fortunes with those closer to Launceston and coastal resorts the ones most likely to gain overall.

Population change into the future

The Demographic Change Advisory Council (DCAC) of Tasmania has developed population projections for Tasmania's 29 LGAs for 2007 to 2032. The projections were created by DCAC using a cohort component method based on estimated resident populations as at 30 June 2007. There are three series, based on differing assumptions about rates of fertility, mortality and migration. DCAC states that for most purposes the medium series should be used, however the high and low series indicate the sensitivity of population change to changes in the underlying assumptions. It is important to note that population projections are not predictions, but are simply examples of how population would change if the assumptions were to hold true for the period of projection. The rates of projected population change over the 25 year period 2006-2031 for the low, medium and high series developed by DCAC are provided in **Error! Reference source not found..**

- ◆ The medium series (based on assumptions most similar to recent trends) shows population growth for all Northern LGAs. Highest rates of population growth (up to 30.3% over 25 years) are projected for

Break O'Day, West Tamar and Launceston LGAs, with lowest rates of growth in Dorset (less than 0.1%), Flinders and Northern Midlands.

- ◆ The low series, on the other hand, shows projected population losses in Dorset (almost -20% over 25 years), Flinders and Northern Midlands, with gains in all other LGAs – highest rates in West Tamar (13.6%) and Break O'Day.
- ◆ The high series projected significant rates of population growth in all Northern LGAs – from the highest rate of 50.3% (over 25 years) in Break O'Day to the lowest of just over 17% in Northern Midlands and Dorset.

An aerial photograph of a lush, green rural landscape. The foreground and middle ground are dominated by rolling hills covered in vibrant green grass and patches of darker green, possibly indicating different crops or forested areas. A small cluster of buildings, likely a village or town, is visible on the left side. The background shows more distant hills under a bright blue sky with scattered white clouds. The overall scene conveys a sense of natural beauty and sustainable land use.

Sustainability and resilience

Sustainability and resilience

Constructing advantage at a regional level requires an acknowledgement at a regional planning level that sustainability is not just reduced to environmental sustainability. Sustainability has three frameworks: environmental, social and economic. Sustainable development is the outcome of sustainability measurement and indicators.

Sustainable development has an important inter-generational principle that establishes a need for stewardship or present resource consumption to support sustainable opportunities for future generations.

Community resilience refers to the capacity of a region or community to respond to significant shocks across the three sustainable development frameworks. Those shocks could be an environmental shock related to climate change; social shocks relating to declining service delivery in vital areas such as health, ageing and educational services and; economic shocks through industry closures and employment losses in regions and the negative flow-on effects at a community level.

Many factors such as social capital – the networks and relationships that define a sense of identity – the community glue – are critical components of community resilience. Wages that tend to be spent locally, access to employment opportunities in a community, local service support and education and training options are all critical components of community resilience when ever-increasing shocks occur across a region.

Environmental resilience

Natural environment and resources

This section provides information about the natural environment in Northern Tasmania. Features of the natural environment include climate, landforms, topography, soils, vegetation, and water.

Climate

Error! Reference source not found. to **Error! Reference source not found.** provide climate information for Tasmania from the Bureau of Meteorology for a 12 month period from May 2009 to April 2010.

- ◆ **Error! Reference source not found.** depicts maximum temperature in Tasmania. In the Northern region this ranges from 9°C-12°C in the highland areas to 18°C-21°C in coastal areas and around the Tamar Valley. The map shows that the Northern region has a somewhat warmer climate than other regions in Tasmania.
- ◆ **Error! Reference source not found.** shows minimum temperature in Tasmania. In the Northern region this ranges from 0°C-3°C in Central Tasmania to 9°C-12°C in coastal areas.
- ◆ Annual rainfall for May 2009 to April 2010 is mapped in **Error! Reference source not found.**. The Eastern half of the state, including the Northern region experienced much less rainfall than the West. In the Northern region, rainfall varied from 600mm-900mm around Launceston and down into the Midlands, and along the Northern coast; to 1200mm-1800mm in higher altitude areas.

Landscape

Error! Reference source not found. to **Error! Reference source not found.** are three broad overviews of the landscape in the Northern region.

- ◆ **Error! Reference source not found.** is imagery from LandSat satellites giving an indication of terrain and land cover in the region.
- ◆ **Error! Reference source not found.** maps topographic relief or elevation above sea level. Most evident are the mountainous areas in the central northeast and in Meander Valley (M) – Pt B.

- ◆ **Error! Reference source not found.** provides a simplified view of the topography and landforms with the location of plains, low hills and steep hills clearly evident.

Soil and water

Error! Reference source not found. depicts the dominant soil orders present in Northern Tasmania.

Water catchments relative to SLA boundaries and major water bodies are shown in **Error! Reference source not found.** and **Error! Reference source not found.**.

Vegetation

Distribution of classes of land cover is mapped in **Error! Reference source not found.**. This includes native vegetation communities by community group, as well as agricultural land and plantations. Dominant land cover classes in the region are dry eucalypt forest and woodland and agricultural land, as well as wet eucalypt forest and woodland. Eucalypt forest classes include production forestry.

Land use

Existing land use influences potential conversion to other uses, as well as compatibility, or otherwise, of surrounding land uses. To reduce the potential for conflict, compatible adjacent land uses – that is, those that have minimal adverse impacts on the other – are desirable. This section explores existing land use with a number of datasets.

Error! Reference source not found. maps the distribution of existing land use in the Northern region. **Error! Reference source not found.** and **Error! Reference source not found.** provide analyses of land use using these data, combining some classes of land use such as cropping and grazing.

Error! Reference source not found. gives area of each land use in hectares for each SLA; blue shading indicates the SLA with greatest area of that land use in the region.

- ◆ In the Northern region the land uses with the greatest area are residual native cover (602,000ha) and grazing (562,000ha) followed by production forestry (388,000ha), other minimal use (203,000ha), and plantation forestry (108,000ha).
- ◆ The largest SLA, Northern Midlands (M) – Pt B, has the greatest area of cropping, grazing and residual native cover in the region.
- ◆ West Tamar (M) – Pt A has the largest area of horticulture in the region.
- ◆ Dorset (M) has the greatest area of dairy properties, plantation forestry and mining in the region.
- ◆ Break O’Day (M) has the largest area of production forestry.
- ◆ Flinders (M) has the greatest area of other minimal use in the region.
- ◆ Launceston (C) – Pt B has the greatest area of urban residential in the region.

Error! Reference source not found. provides the proportion of land in each SLA for each land use; green shading indicates the predominant land use for each SLA.

- ◆ In Break O’Day (M) the predominant land use is production forestry with 40% of SLA land area, followed by residual native cover (35%).
- ◆ In Dorset (M) the main land uses are residual native cover (27%) and grazing (21%).
- ◆ For Flinders (M), other minimal use uses over 55% of land area.

- ◆ Major land use in both George Town (M) – Pt A and Pt B is residual native cover with 37% and 39% respectively. Grazing is also an important land use (30% and 28%).
- ◆ All land in Launceston (C) – Inner is urban residential.
- ◆ Urban residential also comprises 20% of land in Launceston (C) – Pt B, but the predominant land use is grazing (40%).
- ◆ Land use in Launceston (C) – Pt C is mainly production forestry (32%), residual native cover (28%) and grazing (20%).
- ◆ The major land use in both Meander Valley (M) – Pt A and Pt B is residual native cover with 35% and 40% respectively and grazing is also important (32% and 25%). In Meander Valley (M) – Pt A another 24% of land is used for urban residential purposes.
- ◆ In Northern Midlands (M) – Pt A and Pt B, and West Tamar (M) – Pt A land uses are predominantly grazing (73%, 48%, and 40%), with residual native cover also significant in Northern Midlands (M) – Pt B and West Tamar (M) – Pt A.
- ◆ In West Tamar (M) – Pt B dominant land uses are residual native cover (35%), grazing (27%) and production forestry (22%).

Error! Reference source not found. shows the distribution of hardwood and softwood plantations in the Northern region. The majority of plantations are in ‘rural’ SLAs except for Northern Midlands (M) – Pt B which has few plantations and also has a large proportion of land used for agriculture.

Primary production

The Northern region has approximately 1,470,000ha of land parcels coded as primary production – agriculture and horticulture, forestry and aquaculture.

Error! Reference source not found. shows the vast extent of parcels coded as primary production in the region, the majority of which is coded as ‘grazing/pastoral’ and ‘forestry – not classified’.

Residential

Residentially coded parcels in the region comprise 60,230ha, of which 52,100ha is coded rural residential. **Error! Reference source not found.** maps the distribution of parcels coded as residential by sub-category. The SLAs with the greatest area of land coded as rural residential are Meander Valley (M) – Pt B, Launceston (C) – Pt C, Break O’Day (M), and West Tamar (M) – Pt A and Pt B.

Vacant land

The Northern region has 28,700ha of land parcels coded as vacant land. **Error! Reference source not found.** shows the distribution of parcels coded as vacant land by sub-category across the region. All SLAs with the exception of Launceston (C) – Inner have parcels coded as vacant land. SLAs with the majority of the region’s area of coded vacant land are Break O’Day (M), Meander Valley (M) – Pt B, Flinders (M), and Launceston (C) – Pt C.

Planning zones

Planning zones and their codes differ from planning scheme to planning scheme. To produce a broad-brush snapshot of current planning zones in **Error! Reference source not found.**, similar planning zones were grouped into broad composite zones. For more detailed information on planning zones, individual planning schemes should be consulted.

Conservation and protection

Reserves

Error! Reference source not found. and **Error! Reference source not found.**-**Error! Reference source not found.** provide data on reserves in the Northern region, including National, State, Local Government and Private Reserves.

Error! Reference source not found. maps the extent of land under reserve by type of reserve in the Northern region.

Error! Reference source not found. quantifies land area by type of reserve in hectares, with blue shading indicating the SLA with the largest area of that reserve type in the region.

- ◆ The Northern region is approximately 1,995,200ha, of which almost 1,140,000ha are not in reserves, with another 442,500ha in State Forest. Other State reserves account for another 247,600ha; National Park 141,400ha, Private reserves 24,200ha and Local Government reserves 130ha.
- ◆ Break O'Day (M) has the largest number of hectares in State Forest in the region.
- ◆ Flinders (M) has the largest area in the region of other State reserves (other than State Forest).
- ◆ Launceston (C) – Pt B has the most hectares of land in Local Government reserves in the region.
- ◆ Meander Valley (M) – Pt B has the greatest land area in the Northern region of land in National Park.
- ◆ Northern Midlands (M) – Pt B is the largest SLA in land area in the Northern region, and had the most hectares not in reserves and the most hectares in private reserves.

Error! Reference source not found. shows the proportion of each SLA land area in each type of reserve.

- ◆ In the Northern region, over 22% of land is in State Forest with another 57% not in any type of reserve and 21% in all other reserves combined.
- ◆ The following SLAs have more than 90% of their land area not in reserves: George Town (M) – Pt A, Launceston (C) – Inner and Pt B, Meander Valley (M) – Pt A, Northern Midlands (M) – Pt A, and West Tamar (M) – Pt A. These are all the 'urban' SLAs.
- ◆ In addition, the following SLAs have more than 2/3 of their land area not in reserves: Flinders (M), George Town (M) – Pt B, Northern Midlands (M) – Pt B, and West Tamar (M) – Pt B.
- ◆ Launceston (C) – Pt C has over 60% of land area not in reserves, and an additional 33% in State Forest.
- ◆ Dorset (M) has just under 50% of land area not in reserves, with an additional 32% in State Forest.
- ◆ Meander Valley (M) – Pt B has 44% of land not in reserves, with 24% in National Park and 18% in State Forest.
- ◆ Break O'Day (M) has only 28% of land not in reserves and 49% in State Forest.

World Heritage Area and Ramsar wetlands

The Tasmanian Wilderness World Heritage Area (**Error! Reference source not found.**) and Ramsar wetlands (**Error! Reference source not found.**) are areas of high conservation value recognised to be of international significance.

The Tasmanian Wilderness World Heritage Area encompasses outstanding natural and cultural values and is recognised as being part of the natural and cultural heritage of the world community, and is thus protected through

inclusion on the World Heritage List. The majority of the Tasmanian Wilderness World Heritage Area is in Southwest Tasmania; however it does extend into the Northern region in Meander Valley (M) – Pt B (**Error! Reference source not found.**).

Wetlands which are recognised as internationally important are registered on a list of the Convention on Wetlands, signed in Ramsar, Iran in 1971. The Convention on Wetlands is commonly known as the Ramsar Convention. There are ten Ramsar listed wetlands of international significance in Tasmania, and four of these are located in the Northern region (**Error! Reference source not found.**).

Geoconservation features

Geoconservation features are non-living parts of the natural environment such as geological features, landforms and soils with significant conservation values (Sharples 2002). The Tasmanian Geoconservation Database (TGD) is a database of sites of geoconservation significance in the State of Tasmania developed by the Department of Primary Industry, Parks, Water and Environment. The database records sites of significance in relation to the following values: ecological or natural process, geoheritage, and/or representative value (Sharples 2000).

The great majority of geoconservation features listed in the Tasmanian Geoconservation Database for the Northern region are in rural SLAs.

- ◆ **Error! Reference source not found.** maps geoconservation features and their level of significance – ranging from world significance to local significance.
- ◆ **Error! Reference source not found.** maps the geoconservation features according to the type of significance – ranging from ‘outstanding and representative’ to ‘representative’.

- ◆ **Error! Reference source not found.** maps the geoconservation features according to sensitivity of their geoconservation value. This ranges from values with very high sensitivity such that free ranging careful human pedestrian passage may cause inadvertent damage; to values sensitive only to very large scale contour change.

Threatened flora, fauna and vegetation communities

Threatened flora and fauna are mapped using reported observations of threatened vertebrates, invertebrates and flora in **Error! Reference source not found.**. This map provides some indication of areas where threatened species may be present; however these data does have limitations. Reported observations are biased towards areas of higher levels of human visitation – thus increasing the chances of an observation. Threatened species living in an area seldom frequented by people are far less likely to be observed and thus reported and appearing in the database. This map does not attempt to map habitat for threatened species.

Error! Reference source not found. maps threatened vegetation communities in the Northern region. Status of threatened vegetation communities ranges from ‘rare and endangered’ to ‘rare’.

Areas with potential conservation and protection values

Land with potential protection value has been shown in composite maps using data for threatened vegetation communities, prime agricultural land and geoconservation features in **Error! Reference source not found.** and **Error! Reference source not found.**. Protection in this instance refers to both conservation values to be protected in the case of vegetation communities and geoconservation features; as well as agricultural values, in the case of prime agricultural land, that may limit non-agricultural uses in order to retain this land for agricultural purposes. These are not the only factors to be considered in areas that may have values that should be protected, but the maps provide an indication of areas that may be significant. These values

should be considered when land use planning and land management decisions are to be made.

Error! Reference source not found. is a map combining these three features of potential conservation value, and **Error! Reference source not found.** combines these three conservation values on private land.

Land management

Selected physical factors that may limit future land use and land management are included in this section. These are landslip susceptibility, acid sulphate soil, salinity, and coastal inundation.

- ◆ Susceptibility to land instability is mapped in **Error! Reference source not found.**, with the areas of highest potential susceptibility around the Tamar River and Lilydale.
- ◆ **Error! Reference source not found.** shows land systems of the Northern region and salinity. Of the areas that have been mapped for salinity, all containing areas of severe salinity are in Northern Midlands (M) – Pt B, the Northern SLA that has the greatest area of land used for agriculture.
- ◆ **Error! Reference source not found.** maps the probability of acid sulphate soil. Not all land in the Northern region has been mapped for this factor. Areas of high probability (>70%) are small in area but scattered throughout the region.
- ◆ **Error! Reference source not found.** shows the extent of coastal flood vulnerability for mean sea levels in 2004.
- ◆ **Error! Reference source not found.** combines the physical limiting factors covered in this report at their most severe levels. Although

the entire region has not been mapped for all factors, this map does demonstrate some areas that may require special attention.

- ◆ **Error! Reference source not found.** extends the coverage of the previous map to include moderate-high levels of these physical factors. A large proportion of the region has moderate-high potential susceptibility to these factors, and points to the importance of their consideration in planning and management decisions.

Transport

Walking, cycling and public transport

Sustainable transport is an important aspect of sustainability. Public transport, walking and cycling are more efficient modes of transport and use less energy resources than private transport. This section provides data on the proportion of people who travelled to work by walking or cycling on a specific day (**Error! Reference source not found.**) and by public transport (**Error! Reference source not found.**).

- ◆ The proportion of people travelling to work by walking or cycling has remained relatively stable between 1996 and 2006, with 4-8% in the Northern region using these modes of transport.
- ◆ For most SLAs, the proportion has also remained relatively stable over this time period, with the exception of Launceston (C) – Inner + Pt B and George Town (M) – Pt B where it increased; and Launceston (C) – Pt C where it decreased (**Error! Reference source not found.**).
- ◆ Proportions in 2006 ranged from less than 4% in West Tamar (M) – Pt A and Pt B and Launceston (C) – Pt C; to 20-24% in Flinders (M).
- ◆ The proportion of people travelling to work on the specified day with the journey including public transport has remained relatively stable

from 1996 to 2006, with 3-4% in Tasmania and 1-2% in the Northern region in 2006.

- ◆ For most SLAs the proportion has also remained relatively stable, but in Meander Valley (M) – Pt A, George Town (M) – Pt B, Northern Midlands (M) – Pt A, and Break O’Day (M) the proportion utilising public transport on their way to work decreased (**Error! Reference source not found.**).

Air travel

Air travel to/from Launceston airport has been increasing since 2002-03. The introduction of low-cost air travel via Launceston with Virgin Blue from 2001, Jetstar from 2004 and Tiger Airways from 2007 influenced the number of passengers almost doubling between 2002-3 and 2008-09 (**Error! Reference source not found.**). The number of total aircraft movements, which is not only influenced by the number of passengers to be transported, but also by type of aircraft, has also risen from 8,000 to 12,000 during this time period (**Error! Reference source not found.**).

Economic resilience

Economic resilience or the ability of an economy to withstand, adapt to, and recover from shocks is influenced by factors such as the spread of businesses across industries, and the size of businesses. Business entry and exit rates may provide an indication of the level of economic sustainability at the business level.

Business entries and exits

The first two figures (**Error! Reference source not found.** and **Error! Reference source not found.**) in this section show the total number of businesses, business entries and business exits for each year from 2004 to 2007 in each SLA.

- ◆ For urban SLAs, all have increased the number of businesses between 2004 and 2007, with the exception of George Town (M) – Pt A which showed little change.
- ◆ Trends were more varied in rural SLAs with some SLAs showing an increase in the number of businesses between 2004 and 2007: Break O’Day (M), George Town (M) – Pt B, Launceston (C) – Pt C, Meander Valley (M) – Pt B, and West Tamar (M) – Pt B. However, Dorset (M), Flinders (M), and Northern Midlands (M) – Pt B recorded a decline in the total number of businesses over the same time period.
- ◆ For almost all SLAs the number of business entries in 2005 was less than in other years, and the number of business exits was greater in 2005.
- ◆ For Dorset (M), Meander Valley (M) – Pt B, and Northern Midlands (M) – Pt B 2006 was a year of high turnover in businesses – with a higher number of both business entries and exits in 2006 than in other years.

Business entry rate, or the proportion of new businesses in the past 12 months is mapped for SLAs for 2003-04 to 2006-07 in **Error! Reference source not found.** and **Error! Reference source not found.**.

- ◆ For Tasmania and the Northern region business entry rate was 10-15% for each of the four 12-month periods shown, but this varied widely across SLAs.
- ◆ Highest rates of 20-25% were recorded in Meander Valley (M) – Pt A and George Town (M) – Pt B in 2004-05; Launceston (C) – Pt C and Northern Midlands (M) – Pt B in 2005-06; and Meander Valley (M) – Pt A again in 2006-07.
- ◆ In 2006-07 the lowest business entry rate of 5-10% was found in West Tamar (M) – Pt B and Launceston (C) – Pt C.

Business exit rate, or the proportion of businesses that exited in the previous 12 months, is mapped for 2004-05 to 2006-07 in **Error! Reference source not found..**

- ◆ For Tasmania and the Northern region the business exit rate was 10-15% in all three 12-month periods.
- ◆ The highest rate of 20-25% was found in George Town (M) – Pt A in 2004-05 and George Town (M) – Pt B in 2006-07.
- ◆ The only Northern SLA to experience the lowest business exit rate of 5-10% in two of the three years was Launceston (C) – Pt C in 2005-06 and 2006-07.

The ratio of business entries to exits in each 12-month period from 2003-04 to 2006-07 is mapped in **Error! Reference source not found.** and **Error! Reference source not found..** This only provides information about entries relative to exits within each year and not their cumulative effect on business numbers.

- ◆ In 2003-04, there were two business entries for each business exit in West Tamar (M) – Pt B, George Town (M) – Pt A and Launceston (C) –

Pt C. Whereas in George Town (M) – Pt B, there were four business exits for each business entry within the 12 month period. In all other SLAs a ratio of 1:1 applied.

- ◆ In 2004-2005 it was George Town (M) – Pt B which had two business entries to each business exit; whereas George Town (M) – Pt A and Break O’Day (M) which had two exits for each entry; and Flinders (M) had three exits to each entry.
- ◆ In 2005-06, West Tamar (M) – Pt B and George Town (M) – Pt B had two business entries for every business exit and Launceston (C) – Pt C had three entries for each exit; whereas Flinders (M) as in the previous year, had three business exits for each entry.
- ◆ In 2006-07, West Tamar (M) – Pt A and Meander Valley (M) – Pt A had two business entries to each exit; whereas West Tamar (M) – Pt B, Launceston (C) – Pt C and George Town (M) – Pt B had two exits for each entry, most likely a consequence of the high entry: exit ratio in the previous year.

Business size

If business activity in an area is predominantly by a small number of large businesses, then this area is likely to be less economically resilient. If one large business leaves the area or ceases business, this may have a significant adverse impact on the local economy.

Error! Reference source not found. and **Error! Reference source not found.** explore very small and large businesses as a proportion of businesses/employers in SLAs in 2006. They are however based on different datasets so direct comparisons should not be made between them.

- ◆ In Tasmania and the Northern region in 2006 56-60% of businesses were non-employing businesses.
- ◆ The SLAs with the lowest proportion of non-employing businesses were Launceston (C) – Pt B, George Town (M) – Pt A and Break O’Day

(M) with 56-60% of all businesses. The SLAs with the highest proportion of non-employing businesses were Launceston (C) – Pt C with 81-85% and George Town (M) – Pt B with 71-75%.

- ◆ Large employers with 20 or more employees made up 4-6% of all employers in Tasmania and the Northern region in 2006.
- ◆ There were no large employers in Launceston (C) – Pt C, George Town (M) – Pt B or Flinders (M) in 2006; and less than 2% in Break O’Day (M).
- ◆ The highest proportion of large employers in 2006 was in George Town (M) – Pt A with 8-10% of all employers, followed by West Tamar (M) – Pt B with 6-8%.

Businesses by industry

The spread of businesses – diversity – across industries spreads the risk increasing resilience to economic shocks, particularly if shocks are confined to one or two industries. **Error! Reference source not found. to Error!**

Reference source not found. chart the number of businesses in each industry for Tasmania, the Northern region, and each SLA for each year from 2003 to 2007.

- ◆ In Tasmania, industries with increasing numbers of businesses for 2003-2007 include construction; property and business services; accommodation, cafés and restaurants; and finance and insurance. Small decreases in number of businesses were in manufacturing; retail trade; and cultural and recreational services. Business numbers in other industries showed little change over this time period. The majority of businesses in Tasmania are in agriculture, forestry and fishing; and property and business services.
- ◆ These trends were also evident in the Northern region, which also saw an increase in businesses in agriculture, forestry and fishing; education; health and community services; and personal and other services, with a slight decrease in wholesale trade; and transport and storage. The majority of businesses are in agriculture, forestry and fishing; and property and business services.
- ◆ In the 'urban' Northern SLAs the majority of businesses are in property and business services; retail trade; and construction, but in Northern Midlands (M) – Pt A and West Tamar (M) – Pt A agriculture, forestry and fishing is also important.
- ◆ In the 'rural' SLAs the majority of businesses are in agriculture, forestry and fishing, but in Launceston (C) – Pt C and West Tamar (M) – Pt B construction is also important. Unlike the other 'rural' SLAs,

Break O'Day (M) has the majority of businesses spread across more industries including agriculture, forestry and fishing; retail trade; construction; and property and business services.

Community resilience

Community resilience is the ability of a community to recover from an environmental, economic or social shock. Community resilience is dependent on individual and collective capacity to withstand and adapt to change.

This section explores some of the factors related to a community's (SLA in this case) resources and capacity to adapt including level of advantage and disadvantage, reliance on Government payments, housing stress, home ownership, household access to private transport and the Internet, and the provision of unpaid assistance.

Socio-economic Indexes for Areas (SEIFA)

Socio-economic Indexes for Areas (SEIFA) are four indexes developed by ABS which summarise different socio-economic aspects of people living in a geographic area. Each index summarises a different set of social and economic data to provide a more general measure of socio-economic conditions. According to the ABS (Australian Bureau of Statistics 2008), "SEIFA uses a broad definition of relative socio-economic disadvantage in terms of people's access to material and social resources, and their ability to participate in society."

The four SEIFA indexes are summarised in Table 1 below.

SEIFA scores represent an average of people living in a geographic area, and provide no indication of the range of advantage or disadvantage present.

Table 1 SEIFA indexes and the types of variables included

SEIFA Index	Types of variables
Index of Relative Socio-economic Disadvantage	21 measures including: households with low/high income, people with tertiary qualification, Internet connection, etc.
Index of Relative Socio-economic Disadvantage	17 measures including: low income, low educational attainment, unemployment, dwellings without motor vehicles, etc.
Index of Economic Resources	15 measures including: household income, housing expenditure, home ownership, etc.
Index of Education and Occupation	9 measures including: proportion of people with a higher qualification, people employed in a skilled occupation, unemployment, etc.

In the maps of SEIFA indexes in this section, deciles have been calculated for each SLA in Tasmania, and the maps reflect the SEIFA decile for that SLA relative to other Tasmanian SLAs in Census years 2001 and 2006. A change in SEIFA decile between Censuses does not necessarily indicate a change in the level of advantage/disadvantage in that SLA – simply a change in advantage/disadvantage relative to other Tasmanian SLAs. A change in decile may be due to changes in other SLAs rather than any change in the SLA in question.

Error! Reference source not found. maps the SEIFA Index of Relative Socio-economic Advantage and Disadvantage which includes measures related to both advantage and disadvantage.

- ◆ In both 2001 and 2006 the more disadvantaged SLAs according to this index were Dorset (M), Break O'Day (M), and George Town (M) – Pt A. In 2001 George Town (M) – Pt B was also at the more disadvantaged end of the spectrum.

- ◆ Amongst the more advantaged SLAs in the region were West Tamar (M) – Pt A and Pt B, Meander Valley (M) – Pt A, Northern Midlands (M) – Pt A and Launceston (C) – Pt B in 2001, and West Tamar (M) – Pt A and Pt B, Meander Valley (M) – Pt A, Launceston (C) – Pt B and Pt C in 2006.

The SEIFA Index of Relative Socio-economic Disadvantage uses measures related to disadvantage only (**Error! Reference source not found.**).

- ◆ The more disadvantaged SLAs in 2001 according to this index were Break O’Day (M) and George Town (M) – Pt A. In 2006 these two SLAs were again more disadvantaged, with Flinders (M) and Dorset (M) also ranked low.
- ◆ Least disadvantaged SLAs in both 2001 and 2006 were Meander Valley (M) – Pt A, West Tamar – (M) – Pt A and Pt B, and Launceston (C) – Pt C.

Error! Reference source not found. maps the SEIFA Index of Economic Resources which reflects the economic resources of households within an area.

Government payments

High levels of reliance on Government payments in a community may indicate a level of vulnerability in terms of a lack of access to economic resources. However, this is only an indicator of income not of assets.

Error! Reference source not found. maps levels of reliance on Government pensions and allowances within SLAs in 2006.

- ◆ In Tasmania in 2006, 30-35% of the population was reliant on Government pensions and allowances.
- ◆ In Break O’Day (M) there was a very high reliance with 40-45% of the population aged 15 and over in receipt of Government pensions and allowances. George Town (M) – Pt A also had high reliance with 35-40%.

The SEIFA Index of Education and Occupation reflects the general level of education and occupation-related skills of people in an area, and is mapped in **Error! Reference source not found.**

- ◆ SLAs of lower relative education and occupation status in 2001 were Dorset (M), George Town (M) – Pt A and Pt B, and Break O’Day (M). In 2006, SLAs with lower status were Dorset (M) and George Town (M) – Pt A.
- ◆ SLAs of higher education and occupation status relative to other Tasmanian SLAs in 2001 were West Tamar (M) – Pt A and Pt B, Meander Valley (M) – Pt A, Launceston (M) – Pt B, and Flinders (M). In 2006, SLAs with higher status were West Tamar (M) – Pt A, Flinders (M), Launceston (C) – Pt C, and Northern Midlands (M) – Pt B.

Across all four SEIFA indexes in 2006, George Town (M) – Pt A is consistently ranked in the bottom decile for Tasmania, and West Tamar (M) – Pt A and Meander Valley (M) – Pt A are consistently ranked in the top two deciles.

Many of the variables mapped in the following sections are also included in one of the SEIFA indexes.

Housing

Housing stress

Housing stress has long been considered an aspect of vulnerability for households. Households are considered to be experiencing housing stress if their housing cost (rent or mortgage repayment) constitutes 30% or more of household income.

Error! Reference source not found. maps three aspects of housing stress in 2006: the proportion of all households who paid for housing who were experiencing housing stress; the proportion of all households purchasing their home who were experiencing housing stress; and the proportion of all renting households experiencing housing stress.

- ◆ In Tasmania and the Northern region 20-25% of all paying households were experiencing housing stress in 2006. Break O'Day (M) had the highest rate of housing stress with 25-30% of all paying households; and Flinders (M) (5-10%) and George Town (M) – Pt B (10-15%) had the lowest rates.
- ◆ For households purchasing their home in Tasmania and the Northern region, 15-20% were experiencing housing stress in 2006. The highest rate was in Dorset (M) with 25-30% of all purchasing households experiencing housing stress; and the lowest rates were again in Flinders (M) (5-10%) and George Town (M) – Pt B (10-15%).
- ◆ In Tasmania, 20-25% of renting households were experiencing housing stress in 2006, and in the Northern region the rate was 25-30%. The highest rate of rental stress of 25-30% was experienced in Break O'Day (M), George Town (M) – Pt A, and Launceston (C) – Pt B and Pt C. The lowest rates were once again in Flinders (M) (5-10%) and George Town (M) – Pt B (10-15%).

Home ownership

Home ownership or purchasing a home may indicate a higher level of attachment – identity – with an area and is also an economic investment indicator.

Error! Reference source not found. maps the proportion of all households who owned their own home outright and **Error! Reference source not found.** the proportion who either owned or were purchasing their own home in 1996, 2001 and 2006.

- ◆ Levels of home ownership across Tasmania and the Northern region declined between 1996 and 2006, with most of the decline occurring between 2001 and 2006. This time period included the Tasmanian property boom peak in 2002-2004, when many homes that may have previously been owned outright, changed hands, and may then have been purchased by mortgage by the new residents; or purchased as rental properties. The only SLAs where home ownership did not decline between 1996 and 2006 were Flinders (M) where home ownership increased and Meander Valley (M) where it remained relatively stable.
- ◆ Home ownership rates in 2006 were 34-37% of all Tasmanian households (down from 40-43% in 1996), and 37-40% of households in the Northern region (43-46% in 1996). Lowest rates of home ownership in 2006 were 31-34% in Launceston (C) – Pt B and 34-37% in George Town (M) – Pt A and Meander Valley (M) – Pt A. The highest rate was in Break O'Day (M), where 49-52% of households owned their own home.
- ◆ Home owners and home purchasers are combined in **Error! Reference source not found.** No trends are evident between 1996 and 2006, with similar levels in both 1996 and 2006 in the state, the region and SLAs, with the exception of Flinders (M) where the

proportion of home owners and purchasers combined increased from 50-55% of all households in 1996 to 60-65% in 2006.

- ◆ In 2006 rates of home ownership/purchasing ranged from 55-60% in Launceston (C) – Pt B and George Town (M) – Pt A; to 80-85% in the

Access to transport and communication

Access to motor vehicle

In a region with somewhat limited public transport in many areas, a household's access to a motor vehicle is an important indicator of ease of access to services and employment opportunities. The proportion of all households with no motor vehicle (**Error! Reference source not found.**) and the proportion with three or more motor vehicles (**Error! Reference source not found.**) are covered in this section.

- ◆ From 1996-2006 the proportion of households with no motor vehicle generally decreased, or in some SLAs remained relatively stable.
- ◆ In 2006 the lowest rate of less than 2% of all households was in West Tamar (M) – Pt B and George Town (M) – Pt B; and the highest rate of 12-14% was in Launceston (C) – Inner + Pt B which also has the highest provision of public transport. 10-12% of households in Flinders (M) and George Town (M) – Pt A also had no motor vehicle in 2006.
- ◆ The proportion of households with three or more motor vehicles increased in Tasmania, Northern region and most SLAs between 1996 and 2006.
- ◆ The lowest rate of households with three or more vehicles in 2006 was 10-15% of households in Launceston (C) – Pt B; and the highest rates were 35-40% in West Tamar (M) – Pt B and 30-35% in Launceston (C) – Pt C.

'outer Tamar' SLAs of West Tamar (M) – Pt B, George Town (M) – Pt B and Launceston (C) – Pt C.

Increasing numbers of households with three or more motor vehicles has implications for the provision of off-street parking at residential dwellings. As a proportion of all households multi-vehicle households are highest in the rural SLAs, particularly the 'outer Tamar' SLAs. However, of the almost 9,000

households with three or more vehicles in the Northern region in 2006, one-third were in Launceston (C) – Inner + Pt B; one-third in the other urban SLAs; and one-third in the rural SLAs.

Internet connection

Access to the Internet means ready access to information and communication technology, and access to broadband Internet, means fast access to information and communication technology.

Access to information is an important indicator of resilience and the capacity to be prepared for and respond to change, and make the most of enterprise and social opportunities linked to 'connectivity'.

The NBN roll-out will directly impact on Scottsdale (Dorset (M)); St Helens (Break O'Day (M)); George Town (George Town (M) – Pt A) and Deloraine (Meander Valley – (M) – Pt B).

Launceston City (Launceston (C) – Inner and Part B) will also be a beneficiary of stage 3 of the NBN roll-out.

Error! Reference source not found. and **Error! Reference source not found.** show data related to Internet connection for households in the Northern region in 2006.

- ◆ 45-48% off households in Tasmania and the Northern region were connected to the Internet in 2006.
- ◆ The highest rates of households without Internet connection were in George Town (M) –Pt B and Break O'Day (M) (54-57%), followed by George Town (M) – Pt A and Dorset (M) (51-54%).
- ◆ Highest rates of households with Internet connection were in West Tamar (M) – Pt A and Pt B (63-66%), followed by Meander Valley (M) – Pt A (60-63%).
- ◆ Of all households in Tasmania and the Northern region, 25-30% had a broadband Internet connection in 2006. Lowest rates were in George Town (M) – Pt B (less than 5%) and Launceston (C) – Pt C (5-10%). Highest rates were in the 'urban' SLAs – West Tamar (M) – Pt A (35-40%), Launceston (C) Inner + Pt B, Meander Valley (M) – Pt A, and Northern Midlands (M) – Pt A (30-35%).
- ◆ Broadband connected households were 50-60% of all households with Internet connections in Tasmania and the Northern region in 2006. The lowest rate was 10-20% in George Town (M) – Pt B and Launceston (C) – Pt C. Highest rates were again in the 'urban' SLAs – Launceston (C) – Inner + Pt B (60-70%) and West Tamar (M) – Pt A, Meander Valley (M) – Pt A, Northern Midlands (M) – Pt A, and George Town (M) – Pt A (50-60%).

Health and disability

Health and disability levels in a community may also influence resilience.

Error! Reference source not found. provides data on two aspects of health – active mental health clients and the rate of congenital abnormalities for Local Government Areas.

- ◆ In 2006-07, 12-14 people per 1,000 population in Tasmania were active mental health clients, including 10-12 per 1,000 population in the Northern region. The lowest rates were in Flinders (M) (2-4 per 1,000 population) and Dorset (M) (4-6 per 1,000). The highest rate was in Launceston (C) (14-16 per 1,000 population). This may be more an indicator of mental health services than of mental health in the community per se.
- ◆ Congenital abnormalities occurred at a rate of 10-15 per 1,000 live births in Tasmania in 2007. There were no congenital abnormalities in Flinders (M) and Dorset (M); and highest rates were in George Town (M) – Pt B (30-35 per 1,000 live births) and Break O’Day (M) (25-30 per 1,000 live births).

Error! Reference source not found. provides measures of the need for assistance with core activities, and the provision of unpaid assistance in 2006.

- ◆ 5-6% of Tasmania’s and the Northern region’s 2006 population needed assistance with core activities. The lowest rate was 3-4% of the population in Flinders (M), West Tamar (M) – Pt B, and Launceston (C) – Pt C. The highest rate was 7-8% in Break O’Day (M) followed by 6-7% in George Town (M) – Pt A.

- ◆ In Tasmania and the Northern region in 2006, 11-12% of the population aged 15 years and over provided unpaid assistance to those in need of assistance due to disability, long-term health problems, or old age. The lowest rate was 10-11% in Launceston (C) – Pt C; and the highest rate of 14-15% was in Break O’Day (M), followed by 13-14% in Flinders (M).

An aerial photograph showing a large industrial and port facility. In the foreground, a large cargo ship named 'GEARBULK' is docked at a pier. The pier is equipped with yellow gantry cranes and is surrounded by numerous red and blue shipping containers. To the left of the ship, there are more containers and a small barge. Behind the pier, a road leads to a large area with two massive piles of orange-brown material, likely sand or gravel, being processed by conveyor systems. Further back, there are several large blue storage tanks, a baseball field, and various industrial buildings and parking lots. The entire facility is bordered by a body of water on the left and bottom, and a line of trees separates it from the background area.

Competitiveness and innovation

Competitiveness and innovation

Regions need to compete by constructing advantage. Constructing advantage will help secure and sustain employment, development and services in infrastructure, health and education services to communities.

Productivity and profitability drive innovation and investment. Innovation is supported by knowledge and skills. Knowledge and skills are human resource challenges for regions. Liveability factors influence the capacity of a region to attract human resource capacity.

Infrastructure

- ◆ The region – comparatively – is very well served in key infrastructure, such as ports and airports that provide access to markets both national and international (**Error! Reference source not found.**). This is a significant comparative advantage over other island-based regions.
- ◆ As a regional city, 17th largest in Australia, Launceston (C) is well served in terms of innovation and competitiveness drivers – airport, hospital, education and training facilities, lifestyle attributes and well-being indicators. The service and enterprise infrastructure is significant. This makes the regional city a potential draw-card at a comparative level to other regional cities in Australia.
- ◆ Bell Bay (George Town (M) – Pt A) is a significant import/export hub for maritime trade (**Error! Reference source not found.**). Bell Bay consistently handles more incoming and outgoing freight than other Tasmanian ports, but Burnie and Devonport are the major ports for containerised freight (**Error! Reference source not found.** and **Error! Reference source not found.**). **Error! Reference source not found.** shows that Bell Bay has fewer ships each year than Devonport or Burnie, but the average cargo of each ship is greater.

- ◆ Indicative wood flows for 2008-2012 are mapped in **Error! Reference source not found.**
- ◆ Coverage for mobile phones and wireless broadband through Telstra networks Next G and 3G is shown in **Error! Reference source not found.** and **Error! Reference source not found.**. According to this map, the majority of the Northern region is covered by the Next G network for voice, picture, video and wireless broadband.
- ◆ Five Northern regional localities will benefit in the three stage National Broadband Network roll-out plan that will add value to innovation and competitive capacity in the region. Significantly, that roll-out will include Launceston (C) in stage three of the roll-out, following on from Scottsdale – Dorset (M); St Helens – Break O’Day (M); George Town – George Town (M) – Pt A and; Deloraine – Meander Valley (M) – Pt B (**Error! Reference source not found.**).

Economic activity

Gross product

Error! Reference source not found. to **Error! Reference source not found.** map the formation of gross product for Local Government Areas (LGAs) by demand components using the results of regional modelling from *Launceston: the State of the City* (National Institute of Economic and Industry Research 2009).

- ◆ Private consumption as a proportion of LGA gross product is consistently higher in West Tamar (M) between 2006 and 2009; George Town (M) has the lowest private consumption proportion of LGA gross product for the same period (**Error! Reference source not found.**-**Error! Reference source not found.**).
- ◆ Government expenditure as a proportion of gross product is highest in Launceston (C) between 2006 and 2009, and lowest in George

Town (M) (**Error! Reference source not found.-Error! Reference source not found.**).

- ◆ In 2009, Construction expenditure as a proportion of LGA gross product was highest (24.1 – 28%) in West Tamar (M) (**Error! Reference source not found.**).
- ◆ Equipment investment in 2009 as a proportion of LGA gross product was highest (12.1 – 14%) in West Tamar (M); Launceston (C); Northern Midlands (M) and; Break O'Day (M). Meander Valley (M) gradually reduced its equipment investment over the period 2006-2009 (**Error! Reference source not found.-Error! Reference source not found.**).
- ◆ In 2009, George Town (M) and West Tamar (M) are the two leading LGAs in the region as international exporters of goods and services measured as a proportion of gross product (**Error! Reference source not found.**).
- ◆ On balance, West Tamar (M) is the region's highest net importers of goods and services, as a proportion of gross product from outside of Tasmania – see **Error! Reference source not found.-Error! Reference source not found.**.
- ◆ Flinders (M) and George Town (M) have the lowest (20.1 – 40%) of imports of goods and services as a proportion of gross product (**Error! Reference source not found.**).
- ◆ In \$ terms, Launceston (C) produces 58.7% of Northern Tasmania regional gross product by industry and Northern Tasmania produces about 25% of Tasmanian gross product by industry.
- ◆ George Town (M) produces the highest per worker \$ Gross product level, \$70,000-80,000 in the region.

Employment

Error! Reference source not found. shows the number of jobs in Tasmania, the Northern region, and Northern SLAs in 2001 and 2006.

- ◆ The total number of jobs has increased between 2001 and 2006 in Tasmania, the region and all SLAs with the exception of Dorset (M), George Town (M) – Pt A, and Launceston (C) – Inner where the number of jobs fell.

Industry of employment for working residents and workforce of each SLA in 2001 and 2006 are provided in **Error! Reference source not found.** to **Error! Reference source not found.**. This allows comparisons between employment in different industries between 2001 and 2006 as well as comparisons between workers who live in an SLA and workers who work in an SLA. **Error! Reference source not found.** details the number of jobs in each SLA by industry in 2006.

- ◆ Launceston (C) – Pt B accounted for the greatest number of jobs in all industries in 2006 with the exception of agriculture, forestry and fishing (Meander Valley (M) – Pt B) and mining (West Tamar (M) – Pt A).

The predominant industry of employment in each SLA is provided in **Error! Reference source not found.**, and the proportion of SLA employment in each industry is mapped in **Error! Reference source not found.** to **Error! Reference source not found.**.

- ◆ Eight SLAs have their highest proportion of employment by industry in agriculture, forestry and fishing: Break O'Day (14%); Dorset (27%); Flinders (29%); George Town (M) – Pt B (34%); Launceston C – Pt C (35%); Meander Valley (M) – Pt B (24%); Northern Midlands (M) – Pt B (35%); West Tamar (M) – Pt B (26%).

- ◆ The agricultural, forestry and fishing industry represents 6% of Northern regional employment (**Error! Reference source not found.**) and 17% for self-employment (**Error! Reference source not found.**) by sector across the region with high levels in the same SLAs.
- ◆ Dorset (M); Flinders (M); George Town (M) – Pt B; Launceston (C) – Pt C; Meander Valley (M) – Pt B; Northern Midlands (M) – Pt B and West Tamar (M) – Pt B have proportions of employment in single sectors that make them vulnerable to competitive checks in those sectors. Employment platforms of that significance also provide the foundation for innovation.
- ◆ Manufacturing is the most significant employment sector in George Town (M) – Pt A (46%) and Northern Midlands (M) – Pt A (18%); with 12% of regional employment in this sector.
- ◆ Launceston (C) – Inner has 23% of SLA employment in retail – a significant concentration as would be expected in the regional city CBD. Northern regional retail employment is 13% - slightly higher than the Tasmanian figure – the region's highest proportional employment industry sector.
- ◆ Launceston (C) – Pt B has its highest employment by industry in health care and social assistance (16%).
- ◆ Education and Training employment (16%) is West Tamar (M) – Pt A's highest employment by industry.

Whilst the proportion of industry group employment in each SLA is of importance at an SLA level, the most significant regional industry employment figure is **Error! Reference source not found.**: this indicates that Launceston (C) – Inner + Pt B accounts for 62.5% of employment in the region.

Error! Reference source not found. to **Error! Reference source not found.** show employment in SLAs in 2006 as a proportion of Northern regional employment for each industry sector.

- ◆ Launceston (C) – Inner + Pt B accounts for the majority of employment in manufacturing (45-50% of regional employment in manufacturing); electricity, gas, water and waste services (66.1%); construction (55.7%); transport, postal and warehousing (51.3%); wholesale trade (72.6%); retail trade (70.6%); accommodation and food services (62.7%); information media and telecommunications (88.2%); financial and insurance services (90.9%); rental, hiring and real estate services (67.1%); professional, scientific and technical services (78.2%); administrative and support services (75.3%); public administration and safety (69.5%); education and training (67.2%); health care and social assistance (76.4%); and other services (70.4%).
- ◆ There are only three industries where Launceston (C) – Inner + Pt B do not dominate regional employment: agriculture, forestry and fishing; mining; and arts and recreation services.
- ◆ Dorset (M) and Meander Valley (M) – Pt B each account for 20-25% of Northern regional employment in agriculture, forestry and fishing.
- ◆ West Tamar (M) – Pt A accounts for 30-35% of regional employment in the mining industry.
- ◆ Launceston (C) – Inner + Pt B and Meander Valley (M) – Pt A each account for 35-45% of regional employment in arts and recreation services.

Error! Reference source not found. to **Error! Reference source not found.** explore employment by Commonwealth, State and Local Government and the private sector for employed SLA residents and SLA workforce in 2001 and 2006.

- ◆ Proportion of employed persons with the Commonwealth government in terms of SLA residents has seen a drop in the percentage in the two dominant residential preferences: West Tamar (M) – Pt A and Launceston (C) – Inner + Pt B between 2001 (4-5%) and 2006 (3-4%). No SLA increased its percentage of residents who are

employed by the Commonwealth government over this period (**Error! Reference source not found.**).

- ◆ Between 5% and 6% of employed persons who worked in Launceston (C) – Inner + Pt B were employed by the Commonwealth government in 2001. This figure fell slightly to 4-5% in 2006 (**Error! Reference source not found.**).
- ◆ In 2006, The SLA with the highest proportion of residents working for the State government were: Launceston (C) – Pt C and Flinders (M) (**Error! Reference source not found.**).
- ◆ In 2006, Flinders (M), Launceston (C) – Inner + Pt B, and Break O’Day (M) has the highest proportion (14-16%) of employed workers in the SLA working for the State government. In both 2001 and 2006, West Tamar (M) – Pt B had 0% of employed persons working for the State government (**Error! Reference source not found.**).
- ◆ In 2006, no SLA in the region had residents working for local government at higher levels than 7%. Flinders (M) had such a level in 2001 (**Error! Reference source not found.**).
- ◆ In 2006, four SLAs – the ‘outer Tamar’ SLAs and Meander Valley (M) – Pt A had 0% of the workforce working for local government (**Error! Reference source not found.**).
- ◆ In 2006, Dorset (M), George Town (M) – Pt A and Pt B, and Northern Midlands (M) – Pt B had the highest percentage (88-91%) of employed residents working in the private sector. In 2001, Meander Valley (M) – Pt B was also included, but Northern Midlands (M) – Pt B at that Census had a lower rate of private employment by residents (85-88%) (**Error! Reference source not found.**).
- ◆ In both 2001 and 2006, West Tamar (M) – Pt B and George Town (M) – Pt B had high rates (97-100%) of employed persons in the SLA working for the private sector. In 2001, Meander Valley (M) – Pt A had similar rates, dropping slightly in 2006.

Agriculture

Employment in agriculture, forestry and fishing is examined more closely in **Error! Reference source not found.** **Error! Reference source not found.** and **Error! Reference source not found.**.

Error! Reference source not found. shows the relative contribution to industry employment.

- ◆ Agriculture dominates employment in agriculture, forestry and fishing in all SLAs with the exception of Meander Valley (M) – Pt A where jobs in Forestry and Support services are important, but small in number.
- ◆ Forestry and logging employment is significant in Break O’Day (M) and Launceston (C) – Pt B as a proportion of employment in agriculture, forestry and fishing.

Error! Reference source not found. provides the relative employment in different agricultural commodities.

- ◆ Sheep, beef, cattle and grain farming dominate agricultural employment in most SLAs.
- ◆ Dairy farms are significant for employment in Dorset (M) and Meander Valley (M) – Pt B.
- ◆ Employment in fruit and tree nut farming accounts for a significant proportion of agricultural employment in and around the Tamar Valley area.

Job numbers by type of agricultural, forestry or fishing business is provided in **Error! Reference source not found.** Shading indicates SLAs with the greatest number of jobs of this type in the region.

- ◆ Dorset (M) has the greatest number of regional jobs in mushroom and vegetable growing; other crops; and forestry and logging.
- ◆ Break O’Day (M) has the most jobs in fishing, but low in number (18).

- ◆ Launceston (C) – Pt B has the greatest number of jobs in forestry support services; and Launceston (C) – Pt C the greatest number of jobs in poultry farming (6).
- ◆ Meander Valley (M) – Pt B has the greatest employment in the region in dairy farming; and other livestock farming.
- ◆ Northern Midlands (M) – Pt B accounts for the greatest number of jobs in sheep, beef, cattle and grain farming; and agriculture and fishing support services.
- ◆ West Tamar (M) – Pt A has the greatest proportion of regional jobs in nursery and floriculture production; fruit and tree nut growing; and aquaculture.

Manufacturing

The number of jobs in manufacturing by type of product are provided for SLAs in 2006 in **Error! Reference source not found.** Shading indicates the SLA with the greatest number of jobs in that type of manufacturing in the region.

- ◆ For almost all types of manufacturing, Launceston (C) – Pt B accounts for the greatest number of jobs in the region, with only two exceptions.
- ◆ Meander Valley (M) – Pt B accounts for the greatest number of jobs in basic chemical and chemical product manufacturing in the region.
- ◆ George Town (M) – Pt A accounts for the greatest number of jobs in primary metal and metal product manufacturing in the region.

Tourism

An indicator for employment in tourism has been approximated by using the 'Accommodation and food services' and 'Heritage activities' classifications. Breakdown by number of jobs is provided in **Error! Reference source not**

found. Shading indicates the SLA with the greatest number of jobs in that type of service in the region.

- ◆ For almost all of the services included, Launceston (C) – Inner and Pt B accounts for the greatest number of jobs in the region, with only one exception.
- ◆ Meander Valley (M) – Pt B accounts for the greatest number of jobs in the region in 'Nature reserves and conservation parks operation' (16).
- ◆ Jobs in accommodation are very high in Launceston (C) – Inner and Pt B, but are also significant in Break O'Day (M), Meander Valley (M) – Pt A and West Tamar (M) – Pt A where more than 100 people are employed in accommodation in each of these SLAs.

Room nights occupied for Launceston and Tamar Valley Tourism Region and Break O'Day (M) for quarters 2006-2009 are shown in **Error! Reference source not found.** and **Error! Reference source not found.**

- ◆ No trends over the three year period are apparent other than the cyclical nature of tourism in Tasmania, with the highest rates of room occupation in the March quarter each year and the lowest rates in the September quarter.
- ◆ The decline in tourism over Winter influences the number of people employed in tourism services such as accommodation at the time of the Census in August.

Human capital

Human capital – skills and educational qualification are important indicators of capacity building for the knowledge economy that drives much of regional economic competitive challenges.

Valuing education and pathways to higher qualification are challenges for regions in terms of providing skilled workforces and opportunities for innovation, entrepreneurship and enterprise development that meets global demand for products.

- ◆ Direct retention rates of less than 50% across the Northern region are not encouraging statistics in this vital indicator (**Error! Reference source not found.**).
- ◆ University enrolments for the Hobart, Launceston and Cradle Coast campuses for 2001-2009 are provided in **Error! Reference source not found.** and by faculty in **Error! Reference source not found.** An upward trend in university enrolment in the region is encouraging but demographic impacts in the short to medium term for regionally-based enrolments and the uncertainty and risk attached to overseas enrolments require some strategic thinking about the sustainability of the Northern campus of the University of Tasmania.
- ◆ University degree-based qualification is concentrated in the urban-city SLAs, linked to the Tamar Valley – West Tamar (M) – Pt A and Launceston C – Inner and Pt B (**Error! Reference source not found.**). Qualifications of residents match employment opportunities.
- ◆ Non-school qualification for employed SLA residents and for SLA workforce in 2006 is mapped in **Error! Reference source not found.** and **Error! Reference source not found.**. The highest proportion of employed persons with no stated qualification, whether by SLA of work or residence, was concentrated in rural and regional SLAs with the highest level in George Town (M) – Pt B.
- ◆ Non-school qualification for unemployed persons by SLA of residence is given in **Error! Reference source not found.**. There were no unemployed residents with tertiary qualifications living in Flinders (M) or George Town (M) – Pt B in 2006. Launceston (C) – Pt C had the highest proportion of unemployed persons with tertiary qualifications.

The highest percentage of unemployed persons with a certificate or diploma was in West Tamar (M) – Pt A. In George Town (M) – Pt B, residents with no qualification stated were 95-100% of unemployed persons.

- ◆ Highest level of schooling of unemployed persons in 2006 is mapped in **Error! Reference source not found.**. The highest proportion of unemployed who completed Grade 12 was in Launceston (C) – Inner + Pt B. Flinders (M) had the highest proportion who completed Grade 10 or 11 and George Town (M) – Pt B had the highest proportion who had not completed Grade 10 (35-40%).
- ◆ **Error! Reference source not found.** to **Error! Reference source not found.** graph occupation by qualification for SLA residents in 2006. The Northern region profile mirrors Tasmanian profile as does Launceston (C) – Inner + B and West Tamar (M) – Pt A. 'Urban' SLAs 'less' dependent on Managers and Professionals with no qualifications. Some 'rural' SLAs showing a similar pattern but North East 'rural' SLAs remain heavily reliant on semi-skilled and unskilled persons across all occupations.
- ◆ Underemployment is indicated by the proportion of tertiary or vocational qualified employed persons working in unskilled occupations (**Error! Reference source not found.**). Underemployment of tertiary qualified persons was relatively low in the region with the highest levels in 2006 being found in Flinders (M); underemployment of vocational qualified persons was again relatively low across the region but highest in Dorset (M).

Entrepreneurial activity

Entrepreneurial activity is not established by specific datasets. It is merely indicative of activity that may or may not be linked to identified datasets being present at SLA level.

In this report self-employed persons are potentially indicative of entrepreneurial activity and it is possible to cross-reference this occurrence with a range of other factors at SLA level such as liveability components. For example, entrepreneurs may be self-employed individuals working and living in the same SLA in small business occupations.

Error! Reference source not found. shows the proportion of employed persons who were self-employed in 2006 by SLA of residence and by SLA of work.

- ◆ Flinders (M) (28-32%), Meander Valley (M) –Pt B, Dorset (M) and Break O’Day (M) (24-28%) had the highest proportion of self-employed persons who lived in that SLA.
- ◆ West Tamar (M) – Pt B had the highest proportion (over 50%) of self-employed persons who worked in that SLA, followed by the other ‘outer Tamar’ SLAs Launceston (C) – Pt C and George Town (M) – Pt B with 32-36% of the workforce.

Error! Reference source not found. to **Error! Reference source not found.** provide information about the industries of self-employed persons by their SLA of work. **Error! Reference source not found.** gives the share of SLA self-employment in each industry, with shaded cells indicating the predominant industry of self-employment for SLAs.

- ◆ 17% of the Northern region’s self-employment is in agriculture, forestry and fishing, with 14% in retail trade and 12% in construction.
- ◆ In all eight rural SLAs the predominant industry of self-employment is agriculture, forestry and fishing, with the highest 63% of self-employment in George Town (M) – Pt B.
- ◆ Construction is the most significant industry of self-employment in George Town (M) – Pt A, Meander Valley (M) – Pt A and West Tamar (M) – Pt A.

- ◆ In Launceston (C) – Inner and Pt B, retail trade accounts for the greatest proportion of self-employment.
- ◆ Manufacturing is the predominant industry of self-employment in Northern Midlands (M) – Pt A.

Creative professionals and creative industries

Economic geographer, Richard Florida (2002), has argued that attracting professional workers to rural and regional communities is vital to their economic and liveability sustainability. Professional workers in what Florida refers to as the creative industry sectors are drivers of economic prosperity in a global knowledge economy. The choices creative professionals make about where they will live, work and invest is not just a choice that influences regional prosperity – it sends a strong message to other mobile professionals about the attractiveness of regions.

Creative professionals make critical assessments of regions. For example, the education and vocational opportunities available for partners and children are vital considerations for mobile creative professionals, as is the capacity of the region to support a cluster of peer-group support in the industry sector – such as medical and health research.

Datasets don’t test creative indicators but again it is possible to paint a broad-brush assessment of creative industry sectors in a region. Professionals as a proportion of the workforce (by SLA of work) in 2001 and 2006 are shown in **Error! Reference source not found.** Employment in creative industries by SLA of residence and SLA of work is mapped in **Error! Reference source not found.**

- ◆ West Tamar (M) – Pt A and Launceston (C) – Inner and Pt B had the highest proportion (18.1 – 20%) of professions – in the workforce - in the region.

- ◆ Aggregation of creative industries in the region indicate relatively high levels of such industries across the region with particular concentration in Launceston (C) – Inner and Pt B.

Wages and salaries

More recently, Richard Florida (Florida *et al.* 2008) has applied analysis of rural and regional wage and salary earnings as a developing measurement of community resilience. The suggestion here is that wage and salary earnings derived at a local level are significant drivers of resilience because a higher proportion is spent locally and the multiplier effects are significant. Wages and salaries are distinct from general income because some income can be

derived from outside – investments, superannuation, pension and government support – the region and tends to ‘leak’.

Wages as a proportion of total income (excluding Government pensions and allowances) is mapped for SLAs 2004-2007 in **Error! Reference source not found.** and **Error! Reference source not found.**.

- ◆ In 2007, the highest proportion of wages as income in the region was in George Town (M) – Pt A; the SLA with the highest per worker gross product in the region.
- ◆ All SLAs in the region have significantly high levels of wages and salaries as a proportion of total income but the proportion is dropping across the region over time.



Points of interest: SLAs

Points of interest: SLAs

The following is a subjective selection of data for each SLA in Northern Tasmania across the three regional profile platforms: Liveability; Sustainability and resilience and; Competitiveness and innovation.

The purpose is to highlight points of interest in relation to those platforms.

Northern region

- ◆ 24% (133,929) of Tasmania's population (476,481) in 2006; 26% of Tasmania's population increase between 1996-2006;
- ◆ 43% of regional area is in reserves;
- ◆ 28,700ha of land in the northern region is coded as vacant land;
- ◆ Cropping, horticulture and grazing accounts for 31% of the total land use by broad use group; forestry production and plantations account for 25%;
- ◆ 2% of private freehold and leased Crown land in the region is classified as Prime Agricultural land (Class 1-3);
- ◆ Highest level of employment by industry: retail (13%); health care and social assistance (12%) and manufacturing (12%);
- ◆ Highest level of self-employment by industry: agriculture, forestry and fishing (17%); retail (14%) and; construction (12%);
- ◆ 56-60% of businesses in the northern region are non-employing;
- ◆ Northern region contributes approximately 27% of Tasmania's Gross product.

Launceston (C) – Inner + Pt B

Liveability

- ◆ 44% of the region's population lived here in 2006;
- ◆ Lost population between 1996-2001 and gained 2001-2006: gain 1996-2006;
- ◆ Highest % of 75+ age group in 2006;
- ◆ High % of lone person households in 2006
- ◆ More immigration of 15-24 year olds (peak) than outmigration – unlike other SLAs – for educational opportunities.
- ◆ High number of recreational tracks.

Sustainability and resilience

- ◆ Size of workforce exceeds size of working population, 38% of workforce commute in, 15% of working residents commute out;
- ◆ Urban residential comprises 20% of land in Launceston (C) – Pt B, but the predominant land use is grazing (40%);
- ◆ Low prop of non-employing businesses 2006;
- ◆ Highest rate of rental stress 2006;
- ◆ Lowest rate of outright home ownership 2006;
- ◆ Highest rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ LGA Launceston (C) with high equipment investment % of gross product 2009;
- ◆ LGA Launceston (C) produces 58.7% of region's gross product;
- ◆ Employment accounts for 62.5% of region's employment 2006;
- ◆ Most significant industry of jobs 2006 retail trade, then health and community services;
- ◆ High proportion of employed residents with Bachelor degree+ 2006;
- ◆ Low % of self-employed, by SLA of employment;
- ◆ Highest % of both employed residents and workforce employed in 'creative' industries 2006.

Launceston (C) – Pt C

Liveability

- ◆ Lost population in both 1996-2001 and 2001-2006; loss 1996-2006
- ◆ High % of 15-64 age group in 2006;
- ◆ Low % of 65+ age group in 2006;
- ◆ Highest rate of increase in number aged 65+ 2001-2006;
- ◆ High not highest median property sales price 2005-06;
- ◆ Highest proportion of land used for forestry.

Sustainability and resilience

- ◆ Land use in Launceston (C) – Pt C is mainly production forestry (32%), residual native cover (28%) and grazing (20%);
- ◆ Greatest area of parcels coded as holiday homes or shacks;
- ◆ Highest prop of non-employing businesses 2006;
- ◆ No large businesses (20+) in 2006;
- ◆ Highest rate of rental stress 2006;
- ◆ Lowest rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ Most significant industry of jobs 2006 agriculture, forestry and fishing;
- ◆ Majority of employed residents in 2006 worked in manufacturing, followed by retail trade and agriculture, forestry and fishing;
- ◆ High % of workforce Bachelor degree+ 2006;
- ◆ Lowest % of workforce Certificate or Diploma 2006;
- ◆ Highest % of unemployed residents with Bachelor degree+ in 2006;
- ◆ High % of self-employed by SLA of employment.

George Town (M) - Pt A

Liveability

- ◆ High proportion of 2001 population stayed 2001-2006;
- ◆ High % of children (0-15) in 2006;
- ◆ Less than 50% of new residents were employed in 2006;
- ◆ Highest levels of unemployment in new residents;
- ◆ Highest levels of new residents not in the labour force;
- ◆ Lost full and part-time jobs 2001-2006 SLA of work.

Sustainability and resilience

- ◆ Size of workforce exceeds size of working population, 48% of workforce commute in, 27% of workforce residents commute out;
- ◆ Major land use in both George Town (M) – Pt A and Pt B is residual native cover with 37% and 39% respectively. Grazing is also an important land use (30% and 28%);
- ◆ Highest proportion of large businesses in 2006;
- ◆ Consistently ranks very low on all 4 SEIFA indexes in 2006 relative to other Tas SLAs;
- ◆ Highest rate of rental stress 2006;
- ◆ Lowest rate of home ownership/purchasing combined 2006.

Competitiveness and innovation

- ◆ George Town – stage 2 of NBN rollout;
- ◆ LGA George Town (M) lowest private consumption % of gross product 2006-2009;
- ◆ LGA George Town (M) low imports of goods and services % of gross product;
- ◆ LGA George Town (M) high international exports of goods and services % of gross product 2009;
- ◆ LGA George Town (M) highest per worker \$ gross product 2009;
- ◆ Majority of employed residents in 2006 worked in manufacturing
- ◆ High % of SLA working residents worked for private sector
- ◆ Highest wages as % of income 2007

George Town (M) - Pt B

Liveability

- ◆ Gained pop in 1996-2001 and lost in 2001-2006: gain 1996-2006;
- ◆ Increase in rural balance population 1996-2006;
- ◆ Low % of 75+ age group in 2006;
- ◆ Lowest median rent as proportion of median household income (actually fell 2001-2006);
- ◆ Median and range of rent almost stable from 1996 to 2006;
- ◆ No government educational institutions.

Sustainability and resilience

- ◆ Major land use in both George Town (M) – Pt A and Pt B is residual native cover with 37% and 39% respectively. Grazing is also an important land use (30% and 28%);
- ◆ Greatest area of parcels with land use code for public services/institutions/utilities in the region
- ◆ No large businesses (20+) in 2006;
- ◆ Low rates of housing stress, mortgage stress and rental stress 2006;
- ◆ Lowest rate of households with no motor vehicle 2006;
- ◆ Lowest rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ Majority of employed residents in 2006 worked in manufacturing followed by agriculture, forestry and fishing;
- ◆ Highest % of workforce works in private sector;
- ◆ Low % of pop 15+ with Bachelor degree+ 2006;
- ◆ Highest % of unemployed persons with under Grade 10 educational attainment;
- ◆ High % of self-employed by SLA of employment;
- ◆ Lowest % of workforce employed in 'creative' industries 2006.

Meander Valley (M) - Pt A

Liveability

- ◆ Gained population both 1996-2001 and 2001-2006: gain 1996-2006;
- ◆ Highest rate of leaving 2001-2006;
- ◆ Highest rate of new residents – prop of population 2006;
- ◆ Only SLA 1996-2006 increase in number of families with children;
- ◆ Lowest levels of unemployment in new residents;
- ◆ Highest median household income 1996-2006.

Sustainability and resilience

- ◆ Consistently ranks very high on all 4 SEIFA indexes in 2006 relative to other Tas SLAs;
- ◆ Low proportion of SLA workforce live in same SLA 2006;
- ◆ Outright home ownership stable rather than decreased 1996-2006;
- ◆ High rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ Most significant industry of jobs 2006 – retail trade and then cultural and recreation services;
- ◆ Majority of employed residents in 2006 worked in retail trade then health and community services and manufacturing.

Meander Valley (M) - Pt B

Liveability

- ◆ Lost population 1996-2001 and gained 2001-2006: loss 1996-2006;
- ◆ Decline in rural balance population 1996-2006;
- ◆ Peak in outmigration 20-24 age group;
- ◆ Peaks in immigration 30-39 and 55-59 age groups.

Sustainability and resilience

- ◆ High proportion housing loan repayment of median household income 2006;
- ◆ Large exchange of workers with Mersey-Lyell region 2006;
- ◆ The major land use in both Meander Valley (M) – Pt A and Pt B is residual native cover with 35% and 40% respectively and grazing is also important (32% and 25%);
- ◆ Greatest area of parcels coded as aquaculture and parcels coded as rural residential;
- ◆ Largest area of prime agricultural land in the region.

Competitiveness and innovation

- ◆ Deloraine stage 2 of NBN rollout;
- ◆ Most significant industry of jobs 2006: agriculture, forestry and fishing then manufacturing;
- ◆ Accounts for 20-25% of region's employment in agriculture, forestry and fishing 2006;
- ◆ Majority of employed residents in 2006 worked in agriculture, forestry and fishing;
- ◆ High % unemployed residents with Certificate or Diploma 2006;
- ◆ High % of self-employed resident workers.

Northern Midlands (M) - Pt A

Liveability

- ◆ Gained population both 1996-2001 and 2001-2006: gain 1996-2006;
- ◆ 1996-2006 increase in rural balance, increase in mid-size centres;
- ◆ High rate of increase in number aged 65+ 2001-2006;
- ◆ High rate of change in prop of pop aged 65+ 2001-2006;
- ◆ Lowest levels of unemployment in new residents;
- ◆ No government secondary school.

Sustainability and resilience

- ◆ Highest proportion of land used for grazing;
- ◆ Low proportion land – residual native vegetation;
- ◆ Highest proportion of land used for agriculture;
- ◆ Low proportion land used for forestry;
- ◆ High rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ LGA Northern Midlands (M) with high equipment investment % of gross product 2009;
- ◆ Most significant industry of jobs 2006 manufacturing then transport and storage and retail trade;
- ◆ Majority of employed residents in 2006 worked in retail trade, then health and community services and manufacturing.

Northern Midlands (M) - Pt B

Liveability

- ◆ Lost pop 1996-2001 and gained 2001-2006: loss 1996-2006;
- ◆ Lowest proportion housing loan repayment of median household income 2006;
- ◆ Low median property price 2005-06;
- ◆ Low ratio of median property price to median income 2006;
- ◆ Highest full-time as % of employment SLA of residence 2006;
- ◆ About equal size of working population and workforce – but 38% of each commute in/out.

Sustainability and resilience

- ◆ Largest SLA in land area in Northern region;
- ◆ Greatest area of cropping, grazing and residual native cover in the region;
- ◆ Greatest area of land capability classes 4-5 and 6-7 in the region.

Competitiveness and innovation

- ◆ Majority of employed residents in 2006 worked in agriculture, forestry and fishing;
- ◆ Almost 2/3 of employed residents have no stated qualification 2006;
- ◆ Lowest wages % of income 2007;
- ◆ LGA highest net importer of goods and services from outside Tas % of gross product – negative outcome vis-à-vis exports.

West Tamar (M) - Pt A

Liveability

- ◆ Gained population both 1996-2001 and 2001-2006: gain 1996-2006;
- ◆ Peak in immigration 30-39 age group;
- ◆ Greater non-house residential building approvals – and increasing over time;
- ◆ High median rent as proportion of median housing loan repayment in 2006;
- ◆ Low full-time as % of employment SLA of employment 2006;
- ◆ High proportion of working residents who drove to work 2006.

Sustainability and resilience

- ◆ Low proportion of land used for forestry;
- ◆ Largest area of horticulture in the region;
- ◆ Greatest area of parcels coded as residential, 10ha more than Launceston (C) – Pt B.
- ◆ Consistently ranks very high on all 4 SEIFA indexes in 2006 relative to other Tas SLAs;
- ◆ High rate of internet connected households with broadband 2006.

Competitiveness and innovation

- ◆ LGA West Tamar (M) with high equipment investment % of gross product 2009;
- ◆ LGA West Tamar (M) highest private consumption % of gross product 2006-2009;
- ◆ LGA West Tamar (M) with high equipment investment % of gross product 2009;
- ◆ LGA West Tamar (M) high international exports of goods and services % of gross product 2009;
- ◆ LGA West Tamar (M) highest net importer of goods and services from outside Tasmania % of gross product – negative outcome vis-à-vis exports;
- ◆ Most significant industry of jobs 2006 retail trade then education and health and community services;

- ◆ Majority of employed residents in 2006 worked in retail trade, followed by health and community services, manufacturing and education;
- ◆ High % of workforce Bachelor degree+ 2006;
- ◆ Highest % of the workforce are professionals 2006;
- ◆ Highest % of employed residents employed in 'creative' industries 2006.

West Tamar (M) - Pt B

Liveability

- ◆ Gained population both 1996-2001 and 2001-2006: gain 1996-2006;
- ◆ High rates of leaving 2001-2006;
- ◆ Lowest ratio of aged: young in 2006, 1 aged: 2.5 young;
- ◆ Lowest % of lone person households 2006;
- ◆ Peak in outmigration 20-24 age group;
- ◆ Immigration peak 30-39 age group.

Sustainability and resilience

- ◆ Net loss of those with Bachelor degree+ due to migration;
- ◆ Largest average household size 1996-2006. Also has remained stable 1996-2006 all others declined;
- ◆ Lowest proportion housing loan repayment of median household income 2006;
- ◆ Highest median property sales price 2005-06;
- ◆ High full-time as % of employment SLA of employment 2006;
- ◆ Very high proportion of working residents works outside SLA 2006.

Competitiveness and innovation

- ◆ Very low proportion of working SLA residents who work in the same SLA 2006;
- ◆ Most significant industry of jobs 2006 manufacturing then agriculture, forestry and fishing (opposite in 2001);
- ◆ Majority of employed residents in 2006 worked in manufacturing, and retail trade;
- ◆ Highest % of workforce works in private sector;
- ◆ Lowest % of workforce Bachelor degree+ 2006;
- ◆ Lowest % of workforce employed in 'creative' industries 2006.

Break O'Day (M)

Liveability

- ◆ Lost population 1996-2001 and gained 2001-2006: gain 1996-2006;
- ◆ 2001-2006 highest rate of positive net migration;
- ◆ High rate of new residents as proportion of population 2006;
- ◆ High % of 65+ age group in 2006;
- ◆ Peak in immigration 50-69 age group;
- ◆ Highest rates of housing stress and rental stress 2006.

Sustainability and resilience

- ◆ Less than 50% of new residents were employed in 2006;
- ◆ Highest levels of new residents not in the labour force;
- ◆ Lowest level of 15-64 age group employed;
- ◆ Lowest mean household size in 2006;
- ◆ Lowest median household income 1996 and 2006;
- ◆ Highest median rent as proportion of median household income.

Competitiveness and innovation

- ◆ LGA Meander Valley (M) with high equipment investment % of gross product 2009;
- ◆
- ◆
- ◆ Lowest % of labour force full-time workers SLA of residence;
- ◆ Lowest full-time as % of employment SLA as enumerated 2006;
- ◆ Very high proportion of working SLA residents who work in the same SLA 2006;
- ◆ Very high proportion of SLA workforce live in same SLA 2006;
- ◆ Largest area of production forestry: 40% of SLA land area;
- ◆ St Helens Stage 2 of NBN rollout;
- ◆ Majority of employed residents in 2006 worked in agriculture, forestry and fishing followed by retail trade.

Dorset (M)

Liveability

- ◆ Lost population in both 1996-2001 and 2001-2006: loss 1996-2006;
- ◆ Highest proportion of 2001 population stayed 2001-2006;
- ◆ Low rate of new residents as proportion of population 2006;
- ◆ Highest levels of new residents not in the labour force;
- ◆ Very high proportion of working SLA residents who work in the same SLA 2006
- ◆ About equal size of working population and workforce – little commuting in/out.

Sustainability and resilience

- ◆ Greatest area of dairy properties, plantation forestry and mining in the region;
- ◆ Highest rate of mortgage stress 2006;
- ◆ Decrease in number of jobs 2001-2006;
- ◆ Most significant industry of jobs 2006 agriculture forestry and fishing then manufacturing;
- ◆ Accounts for 20-25% of region's employment in agriculture, forestry and fishing 2006;
- ◆ Majority of employed residents in 2006 worked in agriculture, forestry and fishing, followed by manufacturing.

Competitiveness and innovation

- ◆ Scottsdale stage 1 of NBN rollout;
- ◆ High % of SLA working residents worked for private sector;
- ◆ Almost 2/3 of employed residents have no stated qualification 2006;
- ◆ Low % unemployed residents with Bachelor degree+ 2006;
- ◆ Highest levels of underemployment of vocationally qualified 2006;
- ◆ High % of self-employed resident workers.

Flinders (M)

Liveability

- ◆ Lost population in both 1996-2001 and 2001-2006: loss 1996-2006;
- ◆ Highest rate of change in proportion of population aged 65+ 2001-2006;
- ◆ Highest % of lone person households 2006
- ◆ Highest level of 15-64 age group employed
- ◆ Lowest median rent as proportion of median household income (actually fell 2001-2006).
- ◆ Low median property price 2005-06
- ◆ Low ratio of median property price to median income 2006.

Sustainability and resilience

- ◆ Very high rate of volunteering in 2006
- ◆ Highest halls/community centres per 100,000 population
- ◆ Highest sports grounds/complexes per 100,000 population
- ◆ Highest clubs per 100,000 population
- ◆ Highest educational facilities per 100,000 population.
- ◆ Highest cultural facilities per 100,000 population.

Competitiveness and innovation

- ◆ Lowest rate of population needed assistance with core activities 2006;
- ◆ LGA Flinders (M) low imports of goods and services % of gross product;
- ◆ Majority of employed residents in 2006 worked in agriculture, forestry and fishing;
- ◆ Highest levels of underemployment of tertiary qualified 2006;
- ◆ Highest % of self-employed resident workers.

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