

NORTHERN TASMANIA REGIONAL LAND USE STRATEGY

STATE OF PLAY REPORT

Prepared for Northern Tasmania
Development Corporation

Prepared by Ethos Urban

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**NORTHERN
TASMANIA
REGIONAL LAND
USE STRATEGY**

ACKNOWLEDGEMENT

We acknowledge the palawa community of Northern lutriwita/ Tasmania, the custodians of our country, and their elders, past, present, and emerging. The first nations of the Northern Tasmania Region are the Kunnarra Kuna, Leenerrerter, Leterremairrener, Palawa, Pallittorre, Pangerninghe, Panninher, Pinterrairer, Pyemmairrenerpairrener, Trawlwoolway and Tyerrernotepanner Aboriginal people.

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PART 1 — INTRODUCTION

1.1 A new Northern Tasmania Regional Land Use Strategy

Regional Land Use Strategies are an important part of the Tasmanian Planning System. They plan up to 30 years ahead and set the direction for how land use change, growth and development in Tasmania's Regions will be managed. The main purposes of the Regional Land Use Strategies are to:

- Implement the objectives of the Tasmanian Resource Management and Planning System (RMPS), and Tasmanian Planning Policies at a regional scale, and in ways that are appropriate to each of Tasmania's regions.
- Guide local strategic planning and the preparation of Local Provision Schedules in the councils that make up each region. Local Provision Schedules must be consistent with the relevant Regional Land Use Strategy.

The Tasmanian Minister for Planning can declare Regional Land Use Strategies under the *Land Use Planning and Approvals Act 1993 (LUPAA)*. The LUPAA also sets out how Regional Land Use Strategies should be prepared and amended, and requires periodic reviews and updates.

The Northern Tasmania Regional Land Use Strategy (NTRLUS) is one of three Regional Land Use Strategies in Tasmania. The existing NTRLUS, which has a planning horizon to 2032, was first declared in October 2011, with revised editions declared in October 2013, January 2016, June 2018 and more recently in June 2021. Since the preparation of the existing NTRLUS, the Northern Tasmania Region has experienced a surge in migration-based population growth and changes in economic, social and environmental conditions. There have also been reforms and change to planning policy and legislation, including the introduction of the Tasmanian Planning Scheme and the draft Tasmanian Planning Policies.

The intention of preparing a new NTRLUS is to better align it with the current and intended land use outcomes over the next 30 years, to implement State policies, projects and initiatives within the Region and to guide local land use planning. The new NTRLUS is intended to be prepared through a collaborative process that brings together the eight local governments of Northern Tasmania, the Tasmanian Government State Planning Office, other State Departments and utilities companies. This collaborative and coordinated approach to preparation and governance of the NTRLUS offers opportunities to better coordinate implementation. The NTRLUS is intended to be a living document that is periodically reviewed and amended to respond to changes that are likely to occur over the next 30 years.

1.2 The NTRLUS and the Planning System

The Schedule 1 Objectives of the RMPS provide the overarching policy direction that must be furthered through land use planning across Tasmania, particularly through the Tasmanian Planning Policies (TPPs) (currently in draft) and the Tasmanian Planning Scheme (TPS).

The TPPs provide the detailed statewide aims and principles that the NTRLUS is to apply to land use planning for the Region. The TPPs contribute to:

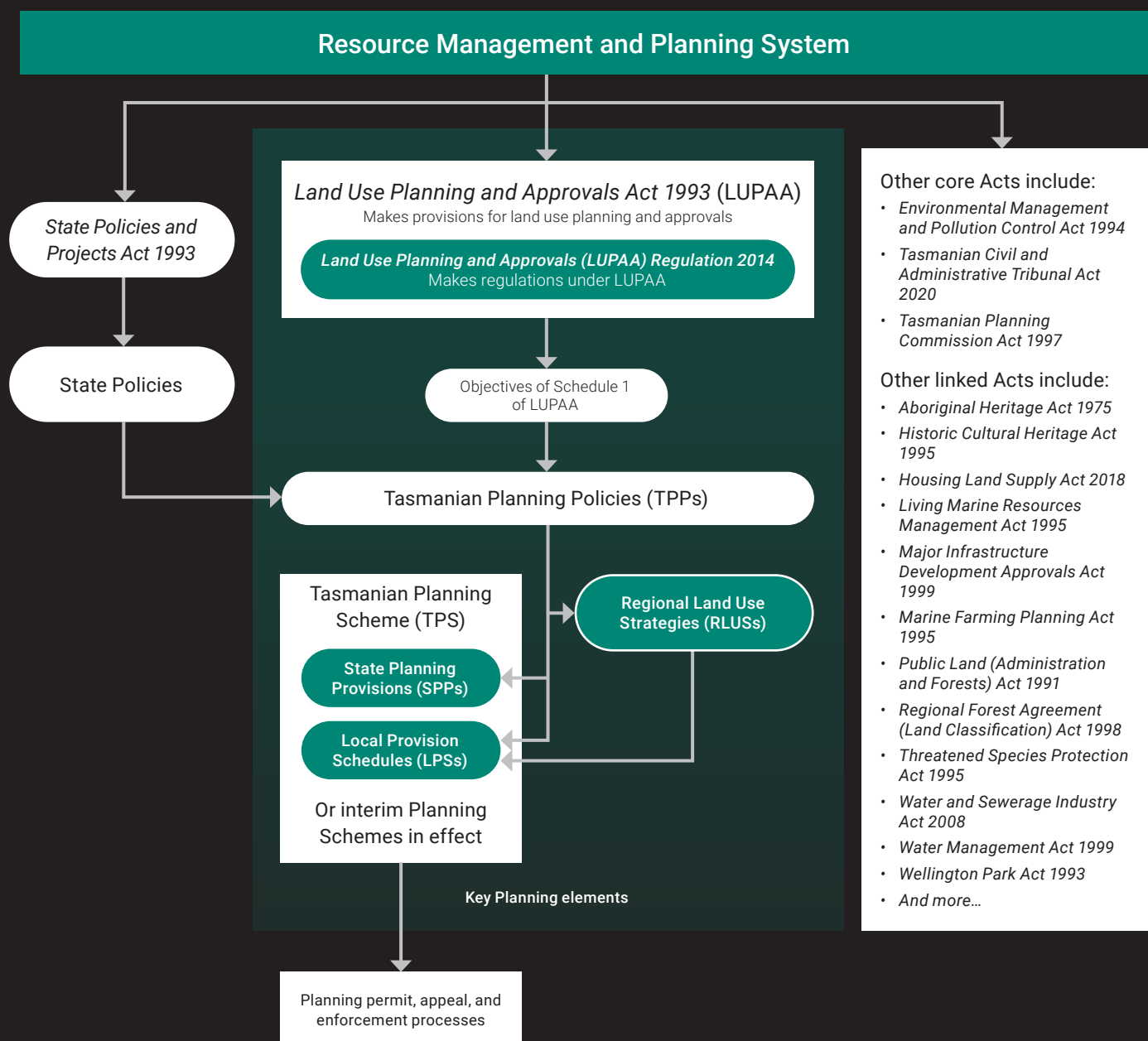
- Providing for the sustainable growth of our cities, towns, and villages so that we can enjoy a good quality of life;
- Protecting our natural environment so that we, and future generations, can continue to benefit from it;
- Planning for increased environmental hazard events and natural disasters, including those arising from climate change, so that our communities are more resilient to those events and disasters;
- Fostering sustainable economic development so that our communities can prosper;
- Delivering the physical infrastructure and services we need cost-effectively and efficiently so our built environments remain healthy and liveable;
- Protecting our heritage so that we can better appreciate the lessons of the past and create a stronger identity for our future; and
- Empowering our communities so that they can develop sustainably in line with their goals and needs.

The TPS has two parts:

- State Planning Provisions (SPPs) that include state-wide provisions including administrative clauses, general provisions, use and development standards for zones and codes.
- Local Provisions Schedule (LPS) that principally apply the SPPs spatially, responding to local context in each council including zone maps, overlay maps, local area objectives, particular purpose zones, specific area plans, site-specific qualifications and code lists for each municipal area in Tasmania.

The TPPs direct the form and contents of the entire TPS. Regional Land Use Strategies guide and inform amendments to, or the preparation of new, LPSs.

The Planning Hierarchy



1.3 The State of Play Report

This State of Play Report is the first step in preparing the new NTRLUS. It summarises available data and information on a range of topics to understand the key influences, challenges, and opportunities in the Region, and the key drivers of growth and change. It addresses what has been learnt from past experience in the Region, what is currently happening, and (for some issues) projections of what may occur over the next 30 years.

Northern Tasmania is a diverse, distinct and complex region. The State of Play Report identifies:

- What makes different parts of the Region unique and the Region different from the other Regions in Tasmania
- Land use issues, opportunities and challenges that are common across the Region
- Things the community values
- Land use planning issues that are important to address for the benefit of people, the economy, and the climate and landscape that make and shape the Region.

While the State of Play recognises differences across the Region, it is focused on issues, opportunities and challenges that are most effectively addressed at a Regional scale, or where local land use planning needs to understand and respond to a Regional context.

The findings of the State of Play Report will inform the preparation of regional strategic directions and a land use planning vision for the Northern Tasmania Region. The findings from the State of Play will underpin the Vision and Regional Strategic Directions by identifying key land use planning opportunities, challenges, gaps and needs for the Region. Consultation with stakeholders across the Region has been integral to the State of Play and will inform the Vision and Regional Strategic Directions.

The State of Play Report is structured using key themes that cover related topics:

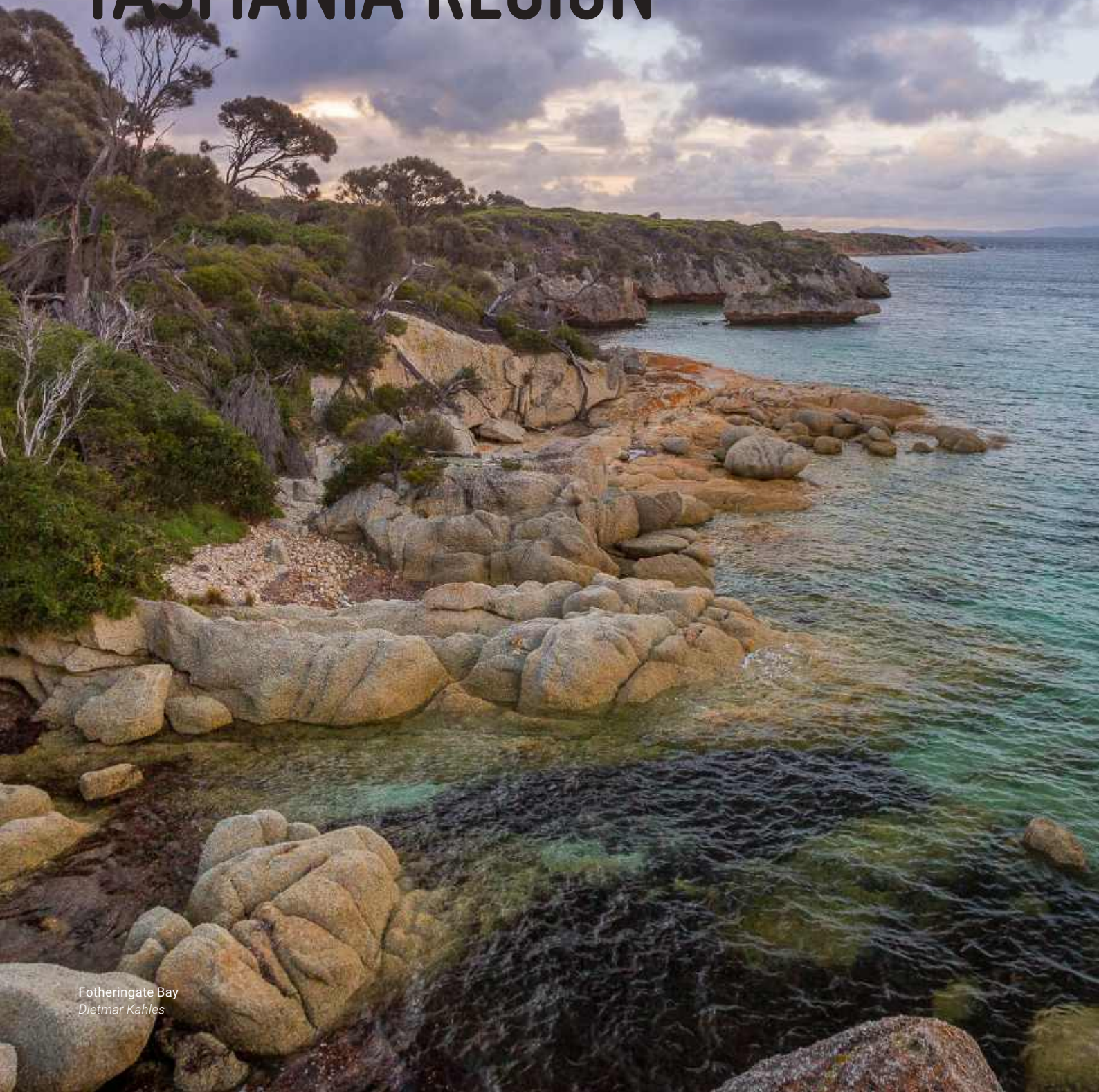
	THEME 1 People, Communities & Growth	• Cultural Heritage & Values • Population Growth & Change • Housing, Placemaking & Growth • Social Infrastructure
	THEME 2 Climate, Landscape, Environmental Values, Natural Hazards & Environmental Risks	• Natural Environment, Landscape Character & Climate • Natural Hazards & Environmental Risks
	THEME 3 Economic Activity & Infrastructure	• Economic Activity & Productivity • Movement & Connectivity • Utilities

For each theme, the opportunities and challenges are summarised to show how the issues are linked and highlight the importance of integrated planning for the Region. Climate change includes impacts that are physical (direct) and transitional i.e. policy and legal, technology, markets and reputation (indirect) which intersects with all the themes and topics listed above. Where relevant, the influence of climate change is discussed within each topic, in addition to an overview within Theme 2.



Cataract Gorge Pool
Nick Hanson Visuals

PART 2 — LUTRUWITA (TASMANIA) AND THE NORTHERN TASMANIA REGION



For the local Aboriginal nations, Tasmania has been and continues to be known as “*lutruwita*.” This State of Play report acknowledges the values, context, and aspirations of the palawa, Tasmania’s Aboriginal people, as the traditional custodians of the land. This understanding and acknowledgement will inform the Vision and Regional Strategic Directions that follow the State of Play Report, and in turn the new Regional Land Use Strategy for Northern Tasmania.



2.1 Northern Tasmania

2.1.1 Overview of the Region

Northern Tasmania is geographically, socially and economically diverse. The Region:

- Includes 8 of Tasmania's 29 local councils
- Covers almost one third of Tasmania's land mass (20,116 square km)
- Is home to 27% of all Tasmanians (157,373 people)
- Contributes substantially to Tasmania's economic growth (10.13 billion GRP in June 2023 growing 0.4% since the previous year and more than a quarter of Tasmania's total GRP)¹

Northern Tasmania is affected by cycles of change. The Region has sustained average annualised population growth of 1.2% over last 5 years². However, the Region has experienced cycles of rapid and slower population growth rates. Sustained economic growth in North Tasmania is contrasted by downturns as some industries change, grow or shrink, resulting in access to skilled labour not always keeping pace with these changes. In response, residents may pursue economic opportunities elsewhere and training is required to fill skill and labour gaps.

Northern Tasmania has a diversity of places and communities, reflecting the diverse geography of the Region and different patterns of development. Greater Launceston is the Region's biggest urban area and is the civic, administrative, economic and cultural centre for the Region. Rural areas, towns and villages surrounding Launceston have closer economic and social ties to the city. Flinders is unique in the Region, and there are clear differences between communities on the east coast that are more remote from Launceston. These communities are by necessity self-reliant and resilient, but also have less access to some essential services, facilities and opportunities because they are distant from Tasmania's larger towns and cities. While some areas are seeing population growth and demographic shifts, other areas are facing the impacts of an ageing population, seasonal economic cycles, inequitable infrastructure investment, shortages in appropriate housing typologies, changing demand patterns and emerging industries.

Planning for such a diverse Region requires region-wide priorities and strategic directions that facilitate certainty and coordination at a regional scale, whilst recognising and respecting local variations. Regional land use planning for Northern Tasmania needs to provide direction and a framework for application at the local level.

Quick Stats³



157,373

Total resident population



5,641

Aboriginal and Torres Strait Islander residents

Northern Tasmania has a higher concentration of Aboriginal and Torres Strait Islander residents (3.9%) compared to Australia overall (3.2%)



71,563

Dwellings



43 years

Median age



66,969

Workforce (in the Region)

Key industries of employment:

- Health Care and Social Assistance (12,170 jobs)
- Education and Training (6,180 jobs)
- Retail Trade (6,980 jobs)

The COVID-19 pandemic and its impacts on Northern Tasmania's population and economic trends has reinforced that planning for the long-term future requires clear direction and land use planning frameworks that acknowledge change will be variable and can adapt. While the Region's population is projected to grow over the next 20-25 years, the rate of growth and the distribution of growth across the Region is likely to differ from current projections. This will affect land use planning responses like how many new homes are needed, what types of housing is best suited, where those homes should be built and the infrastructure and services needed to support communities, the economy and climate resilience.

Northern Tasmania is also moulded by a diverse natural landscape of mountains, waterways, rural landscapes and coastline. Water and mountainous terrain provide settings and define different geographic areas within the Region; they are also barriers to movement and connectivity. They influence patterns of settlement, transportation routes, and contribute to the unique identities of communities and places across the Region. Additionally, nature plays a role in facilitating key economic activities and industries, such as tourism, energy and primary production. From the community's perspective, the Region's appeal is largely lifestyle driven, supported by the unique offerings of the natural landscape and diverse environment.

Whilst benefitting from a unique natural landscape, natural hazards pose significant challenges to Northern Tasmania, especially the impact of flood risk, drought, extreme storm events, coastal hazards and bushfire on communities. Extreme weather events influence people's perceptions of the Region and lifestyle factors. Climate change is also altering natural patterns and will continue to transform the area over time in some cases worsening the threat from natural hazards through the increased and intensity of flooding, bushfire frequency, changing rainfall patterns, increased heatwaves and sea level rise. This dynamic environment, shaped by internal and external changes, presents both opportunities and challenges for land use planning.





2.1.2 Regional climate snapshot and trends

To understand the changing climate at a municipal scale, the Northeast Councils engaged the University of Tasmania's Climate Futures Tasmania (CFT) to prepare profiles based on climate variables that support their decision making. CFT provides the highest resolution climate modelling in Australia, providing a detailed evidence base of the current regional climate and observed trends that can be used to understand climate risk and exposure. This initiative provides a detailed evidence base of the current regional climate and observed trends. The NTRLUS has an opportunity to build on work already undertaken within the Region, around natural hazards, climate change and resilience⁴, to identify climate related risks and potential impacts relevant to a regional planning context, and inform regional planning directions and strategies that amend to manage these impacts and risks.

The below provides a snapshot of Northern Tasmania's current climate and predicted changes which may impact Northern Tasmania's environment, people and economy and have implications for land use planning.

Table 1. Northeast Tasmania Regional Climate Change Snapshot 2024⁵

Current climate snapshot – Northern Tasmania	Potential changes and associated impacts to climate
Temperature	
- Moderate temperature range in coastal areas. - Average daily maximum temperature is around 21°C in summer and 13°C in winter. - Inland areas experience wider temperature variations, including very cold temperatures in winter. - Long-term average temperatures have risen in the decades since the 1950s, at a rate of up to 0.15°C per decade.	- Temperature of very hot days to increase by up to 5°C. - Extended heat waves are likely to enhance the occurrence and intensity of bushfires.
Rainfall	
- Average annual rainfall varies significantly across the region with: 800-1000 mm - north coast - more than 1000 mm - places on the east coast - generally less than 600 mm – inland areas of the midlands and Fingal Valley. - Top daily rainfall in Tasmania all occurred in the region (352 mm at Cullenswood in 1974). - There has been a decline in average annual rainfall across the region since the mid-1970s, with the decline strongest in autumn.	- Increased intensity of short duration rain events are projected. - Rainfall trending to heavier events interspersed by longer dry periods, Increasing high daily runoff events and erosion or flooding. - Rainfall volume in a 200-year average recurrence interval (ARI) event will increase about 16%. - Inundation along the coastline will increase. with the current 100-year coastal inundation event increasing in frequency (50-yearly event by 2030, 5-yearly event by 2090).

LEGEND

- LOCAL GOVERNMENT AREAS
- Regional Land Use Strategy Boundary
- Roads
- Railway
- Rural and Non-Urban Areas
- National Parks, Other Reserves, and Conservation Areas
- Urban Areas
- ✈ Launceston Airport
- ✈ Flinders Airport



Figure 1. The Northern Tasmanian Region

Source Data: Land Information System Tasmania (LIST) and Open Street Map

2.2 Zooming in: A Diverse Region

The Northern Tasmania Region comprises 8 Local Government Areas. There are distinctions which define the different LGAs of the Region in terms of population, social make-up, economic factors, cultural identity, geography, other environmental conditions. The following section provides a summary of these different council areas in terms of their unique social and economic characteristics.



Break O'Day



Break O'Day is situated on the east coast of the Region, approximately 150 kilometres east of Launceston. It covers 3,800 square kilometres and has a growing population, particularly with older people retiring to the area for the coastal lifestyle on offer. Key townships include St Helens, St Marys, Fingal, and Scamander.

Characteristics that are highly valued by residents include the area's strong sense of community and lifestyle-driven feel supported by a prominence of coastal, bushland, and undulating rural landscapes. Like many of the coastal parts of the Region, Break O'Day features a lack of housing diversity and a concentration of shack-style developments and holiday townships with limited amenities and local services. Break O'Day is renowned for its array of beaches, including the Bay of Fires, and nature-based tourism offerings including surfing, snorkelling, fishing, and mountain biking trails.

Climate Statistics⁶

- Average daily maximum temperature – 17.1°C
- Average daily minimum temperature – 7.7°C
- Average annual hot days (>30°C) – 3.2 days
- Average annual rainfall – 789.2mm

Key Break O'Day Statistics¹⁴

7,084

Total population

4.3%

Aboriginal and Torres Strait Islander residents

4,850

Dwellings

56 years

Median age

32.2%

Population aged 65+

\$25,240

Median Individual Income

68.27%

Dwelling Occupancy

19.1%

Rented Dwellings
(% of total occupied private dwellings)

1,989

Workforce



Maurouard Beach
Ethos Urban

Top 5 industries by employment¹⁵

1. Health Care and Social Assistance (284 jobs)
2. Accommodation and Food Services (262 jobs)
3. Retail Trade (249 jobs)
4. Agriculture, Forestry and Fishing (237 jobs)
5. Construction (175 jobs)

Top 5 industries by output¹⁶

1. Agriculture, Forestry and Fishing (\$99.6 million)
2. Construction (\$95.5 million)
3. Manufacturing (\$92.7 million)
4. Mining (\$72.5 million)
5. Rental, Hiring and Real Estate Services (\$69.5 million)





What we heard so far from Break O'Day Council



People, communities and growth

Break O'Day is a lifestyle destination that attracts people seeking coastal amenity, climate and recreation, along with smaller, close-knit communities.

There is strong demand for rural and coastal lifestyle lots in places like Scamander.

The population is ageing through retirees moving to Break O'Day and existing residents getting older, but some older people are also moving to areas like Launceston for better healthcare and services.

There has been recent increases in younger families moving to the area, likely driven by housing construction growth, but also leading to emergence of new industries and businesses.

Recognition of the need for more diverse housing particularly for older people and single people to live in larger towns like St Helens with better access to shops and services.

There is a significant mismatch between house size and the number of people living in them. Houses and blocks are too large for older people and there is a lack of choice for single people, couples and older people.

The high proportion of shacks and sheds on residential land misrepresents the availability of land for more housing and makes it challenging to justify rezoning or upzoning land to increase capacity.



Natural Environment, natural hazards, environmental risks

Natural beauty and scenic amenity are key attractions, particularly on the coast.

Pressure for growth in housing along the coastal strip risks undermining the natural values that attract residents and visitors to Break O'Day.

Climate change is likely to increase risks to communities and the natural environment, particularly the predicted increase of coastal erosion.

There are no scenic protection overlays in the Break O'Day Local Planning Scheme, which is a particular risk to preservation of the scenic values of the coast.



Economic activity and infrastructure

Viticulture, horticulture and agriculture industries are expanding due to favourable climate conditions.

Remote working drove some growth in the local population particularly during COVID lockdowns, with some retention of remote workers in recent years.

Rural industries and emerging activities need better support, such as agricultural land for non-fertile uses.

The seasonal nature of some economic activity (including tourism, agriculture and aquaculture) places pressure on housing and makes it challenging to find and retain staff, particularly because Break O'Day is relatively isolated.

Tourism is diversifying and becoming slightly less seasonal with more off-season visitation particularly for activities like mountain biking.

Infrastructure needs to support population growth and seasonal tourism (e.g., higher summer population).

Accommodation proposals in some coastal areas are not serviced by water and wastewater.

Local Planning Strategies

- [Break O'Day Future Thinking 2022](#)
- [St Helens Municipal Management Plan 2016](#)
- [Break O'Day Land Use Studies Review 2015](#)
- [St Helens and Surrounds Structure Plan 2013](#)
- [St Helens Structure Plan Background Report 2013](#)

Dorset



Positioned in the most northeastern part of the Tasmanian mainland, Dorset has a total land area of 3,231 square kilometres. It is regarded as a highly scenic council area with expansive natural surroundings conveniently positioned within 100km north east of Launceston.

It is well connected by the Tasman Highway, Golconda and Bridport Roads and is bordered by George Town to the west, Launceston to the south, and Break O'Day to the east.

Dorset comprises an array of settlements, including more established towns. Scottsdale, for instance, represents the traditional civic and administrative centre of Dorset and surrounds, while providing essential services to coastal and rural residential areas, including Bridport.

Notwithstanding its overall small population, Dorset contains a range of nationally and globally recognised destinations. These include Bridestowe Lavender Estate, Barnbogle Dunes Golf Links and the town of Derby, which is renowned for the Blue Derby mountain bike trails and other associated recreation amenities.

Agriculture employs 30% of the local workforce, with key industries being dairy farming, forestry and aquaculture.

Climate Statistics⁷

- Average daily maximum temperature – 18°C
- Average daily minimum temperature – 9.3°C
- Average annual hot days (>30°C) – 2.7 days
- Average annual rainfall – 790mm

Key Dorset Statistics¹⁷

7,068

Total population

4.1%

Aboriginal and Torres Strait Islander residents

3,948

Dwellings

48 years

Median age

25.5%

Population aged 65+

\$30,361

Median Individual Income

75.71%

Dwelling Occupancy

19.2%

Rented Dwellings
(% of total occupied private dwellings)

2,650

Workforce



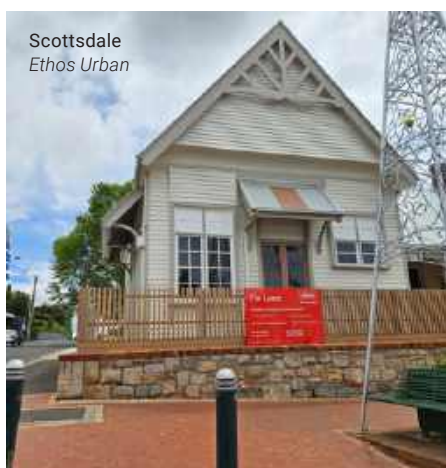
Bridport Old Pier at Croquet Lawn Beach
Ethos Urban

Top 5 industries by employment¹⁸

1. Agriculture, Forestry and Fishing (734 jobs)
2. Construction (239 jobs)
3. Accommodation and Food Services (226 jobs)
4. Health Care and Social Assistance (214 jobs)
5. Retail Trade (204 jobs)

Top 5 industries by output¹⁹

1. Agriculture, Forestry and Fishing (\$308.8 million)
2. Manufacturing (\$140.7 million)
3. Construction (\$129.4 million)
4. Rental, Hiring and Real Estate Services (\$70.7 million)
5. Transport, Postal and Warehousing (\$45.3 million)



What we heard so far from Dorset Council



People, communities and growth

Council are working to strengthen ties with the Aboriginal community and participation in Aboriginal cultural heritage management, particularly near Little Musselroe and Musselroe Bay.

Lack of funding and support, and low prioritisation, for protection of Historic Cultural Heritage.

Perception that heritage protection controls are a constraint to economic growth and renewal on Dorset's towns and villages.

Opportunities for growth in Bridport and Scottsdale through strategic settlement expansion, infill, and subdivision – particularly to attract younger people and families and retreat from trends of an ageing population.

Tiny house initiatives in Scottsdale to address housing pressures.

Demand for seasonal accommodation driven by tourism in locations like Derby and Bridport and agricultural workers impacts on the availability of housing.



Natural Environment, natural hazards, environmental risks

Protecting scenic landscapes in Bridport and Derby and mitigating natural sand movement can support sustainable growth while preserving the natural environment.

Risks from bushfires, flooding, and landslides in various areas, with sand movement exacerbated by stormwater runoff.



Economic activity and infrastructure

Tourism driven by golf, mountain biking, and lavender farming, along with key industries like agriculture, offers continued economic opportunities.

Infrastructure investments like highway upgrades and the North East Wind Farm project support long-term employment and regional output for the near future.

Scottsdale has existing capacity in water and wastewater systems to accommodate housing growth. Meanwhile subject to sufficient investment into public water and wastewater infrastructure systems, Bridport has the most significant growth potential for the municipality.

Renewable energy supply from wind farms and transmission lines supports sustainable growth potential in Dorset.

There are workforce gaps in aged care, health, and agriculture.

Improving transport connectivity offers opportunities for better infrastructure and enhanced regional access. This includes leveraging the recent upgrades of the Tasman Highway to improve commute access to Launceston.

Local Planning Strategies

- [Scottsdale Structure Plan 2024-2044 \(2024\)](#)
- [Derby Structure Plan \(2024\)](#)
- [Dorset Strategic Plan 2023-2032 \(2023\)](#)

Flinders



Flinders is situated to the northeast of Tasmania. Flinders has the smallest resident population of the 8 councils in the Region, but has a strong sense of community driven by isolation and the permanent occupation of only two of the Islands that make up the Furneaux Group. Flinders is remote and wild, with the landscape, communities and economic activity strongly defined by nature and the climate. Flinders is an attractive visitor destination with a strong agricultural sector (primarily beef cattle exports). The landscape is rugged with extensive coastlines and mountainous areas across the islands that make up the Furneaux Group which is defined by rugged landscapes of high ecological value and coastal environments.

Passenger flight connections to the Island are via Bridport, Essendon and Launceston. Regular sea freight services are weekly from Bridport and quarterly from Port Welshpool. Changing sea and weather patterns affect and can constrain the movement of people and freight.

Climate Statistics⁸

- Average daily maximum temperature – 18.4°C
- Average daily minimum temperature – 11.1°C
- Average annual hot days (>30°C) – 5.1 days
- Average annual rainfall – 657mm

Key Flinders Statistics²⁰

939

Total population

15.7%

Aboriginal and Torres Strait Islander residents

683

Dwellings

58 years

Median age

37.8%

Population aged 65+

\$33,262

Median Individual Income

67.20%

Dwelling Occupancy

25.8%

Rented Dwellings
(% of total occupied private dwellings)

424

Workforce



Killiecrankie Beach
Studio Herbert

Top 5 industries by employment²¹

1. Agriculture, Forestry and Fishing (117 jobs)
2. Health Care and Social Assistance (54 jobs)
3. Construction (50 jobs)
4. Public Administration and Safety (37 jobs)
5. Education and Training (32 jobs)

Top 5 industries by output²²

1. Agriculture, Forestry and Fishing (\$51.8 million)
2. Construction (\$29.6 million)
3. Electricity, Gas, Waste and Water Services (\$16.4 million)
4. Transport, Postal and Warehousing (\$11.9 million)
5. Rental, Hiring and Real Estate Services (\$11.3 million)



Mount Strzelecki
Studio Herbert



Castle Rock
Studio Herbert



Wybalenna Chapel
Studio Herbert



Flinders Island Airport
Studio Herbert



Island Aerial
Studio Herbert



What we heard so far from Flinders Council



People, communities and growth

Flinders Island and the surrounding Islands in the Furneaux Group have a rich cultural history. Truwana (Cape Barren Island) is largely Aboriginal Land and locally managed.

The land is remote and not frequented by visitors. It is unique and requires very specific land use planning considerations.

Flinders Island has an aged population which demands health workers and services. High demand for key workers places pressure on housing stock, which is at an all-time low.

As fewer key workers are housed on the Island, economic development and services are limited, but with limited supply of suitable land for housing, the problem grows.

Local education ranges from Kinder to Grade 12, however, the lack of exposure to competitive sports or more demanding and diverse educations sees many of the young people leave Flinders for large schools, college and university. Many stay to ultimately find work – further depleting the younger age demographic.

Planning assumptions that underpin previous rezonings have not increased local supply, as much of the existing vacant land has limited real development potential.

Local Planning Strategies

- [2021–2031 Strategic Plan \(2023\)](#)
- [Flinders LPS Rural Enterprise Concept Report \(2022\)](#)
- [Review of Identified Areas Proposed for Tasmanian Planning Scheme Zoning \(2021\)](#)
- [Flinders Island Structure Plan \(2021\)](#)



Natural Environment, natural hazards, environmental risks

The unique, rugged and remote natural character of Flinders is a big attractor for visitors.

The natural environment and sense of isolation are significant contributors to the identity of local communities.

Clean air and water are major assets that can underpin the growth of nature-based industries.

Weather disruptions can impact sea and air transport to and from the Island.

Local concerns over the loss of fauna and flora conservation, waste management challenges, and the need for investment to meet environmental standards.

The island's strong renewable energy infrastructure (solar and wind) offers opportunities for growth in sustainable industries.



Economic activity and infrastructure

The cost of labour, travel, freight, transport and materials costs makes local construction 40% higher than the rest of Tasmania.

Higher freight and transport costs are due to the remote location, limited services and are further impacted by weather.

Increased housing and accommodation is required to address shortages for residents, visitors and workers (across permanent, seasonal and skilled trades).

Support is required for the local workforce through targeted initiatives like workforce housing and vocational training, particularly in hospitality, trades, and construction.

There is potential to attract younger families by addressing housing and workforce needs. Demand for education presents an opportunity for specialised training programs, particularly in agriculture, aquaculture, and aviation.

Challenges with finance requirements for local residents make local housing conditions worse, combined with the mismatch of empty high-end homes and visitor accommodation with local housing needs.

Opportunity to diversify the economy beyond agriculture (grazing), leveraging tourism, eco-tourism, diversified agriculture activities and local produce and processing.

Opportunities to upgrade infrastructure to meet growing demands, such as improving local capacity to service wastewater systems, waste management, and water supply.

George Town



George Town is situated in the north of the Region, approximately 50 kilometres from Launceston CBD. It covers a total land area of around 652 square kilometres, with George Town as the main township. It primarily comprises rural and rural-residential areas, dominated by low density housing and ageing housing stock.

Agglomeration of historic sites and retirement living hubs exist in areas along the Coast, including Low Head. A significant proportion of land is occupied by dense native vegetation and tree canopy.

Bell Bay is a heavy industry precinct and port that is significant for the whole of Tasmania as one of the key freight connections to mainland Australia and internationally, particularly for heavy manufacturing and renewable energy projects.

Climate Statistics⁹

- Average daily maximum temperature – 18°C
- Average daily minimum temperature – 9.2°C
- Average annual hot days (>30°C) – 1.2 days
- Average annual rainfall – 724.1mm

Key George Town Statistics²³

7,391

Total population

5.2%

Aboriginal and Torres Strait Islander residents

3,685

Dwellings

48 years

Median age

25.7%

Population aged 65+

\$29,975

Median Individual Income

83.8%

Dwelling Occupancy

26.1%

Rented Dwellings
(% of total occupied private dwellings)

2,848

Workforce

Low Head Lighthouse
George Town Council



Top 5 industries by employment²⁴

1. Manufacturing (1,165 jobs)
2. Construction (229 jobs)
3. Agriculture, Forestry and Fishing (223 jobs)
4. Education and Training (214 jobs)
5. Health Care and Social Assistance (166 jobs)

Top 5 industries by output²⁵

1. Manufacturing (\$1,847.7 million)
2. Mining (\$143.7 million)
3. Construction (\$114.8 million)
4. Agriculture, Forestry and Fishing (\$81.1 million)
5. Rental, Hiring and Real Estate Services (\$79.6 million)



Sinapius Vineyard
Adam Gibson

Bell Bay industrial area
Ethos Urban



Port of Bell Bay
Ethos Urban



Low Head
Ethos Urban



Industry - Bell Bay
Ethos Urban



East Beach
Ethos Urban



What we heard so far from George Town Council



People, communities and growth

Opportunities to preserve and enhance local character with thoughtful development plans, that respect local heritage while accommodating growth.

Potential to attract more residents by addressing aging population trends and underutilised housing stock.

Strong workforce demand particularly in industries and ports, but many workers prefer to live outside George Town because of perceptions of amenity and lack of suitable housing options.

Opportunity for growth in Coastal Towns, which offer relaxed, coastal lifestyle opportunities that are in high demand.

Opposition within communities relating to residential growth and potential conflicts with existing environmental, heritage and lifestyle values, and land use conflicts with new renewable energy and industrial developments.

George Town's town centre and established areas have significant potential for urban renewal due to ageing housing stock but coordinated masterplanning is required to ensure local character is maintained.



Natural Environment, natural hazards, environmental risks

Opportunity to improve environmental outcomes by addressing stormwater management and threatened vegetation in development plans.

Insufficient infrastructure for stormwater management in residential growth areas, particularly historic shack towns.

Environmental challenges from threatened vegetation and climate-related impacts not fully addressed in planning.



Economic activity and infrastructure

Opportunities to better align community growth with infrastructure development, ensuring sustainability in residential and economic expansion.

Greenfield residential development is not well planned or sequenced, resulting in infrastructure delivery becoming difficult or inefficient. Need for clear subdivision guidelines and clear mechanisms to fund upgrades on an as-needed basis.

Opportunity for infrastructure improvements (roads, utilities, sewer systems) to support regional growth. Strategic investments in transport networks, including bridges and bypasses, could improve connectivity, particularly for freight. Opportunity to review local vs State management of high use freight routes.

Growing opportunities in renewable energy sectors (solar, wind) could be supported by improved infrastructure and planning. Developing clear frameworks for these industries can drive economic growth while ensuring infrastructure is not overwhelmed.

Misalignment between Council service capacity and community expectations, especially in low-density areas with high infrastructure costs. Tensions around infill development and growth patterns, with inadequate planning for long-term sustainability.

Opportunity to increase support for investment and development opportunities in Bell Bay through increased preparedness and responsiveness to large-scale projects.

Local Planning Strategies

- [George Town Strategic Plan 2020-2030 \(2020\)](#)
- [George Town Township Plans \(2024\)](#)
- [George Town Structure Plan \(2021\)](#)
- [Hillwood Structure Plan Review \(2021\)](#)

Launceston



Launceston is situated where the North Esk River and South Esk River meet the River Tamar. It is the largest city in the Region and the second largest in Tasmania. It covers a diverse area comprising a distinct urban centre, surrounding suburbs and residential growth areas including the South East Corridor (St Leonards) and land south of Prospect. The City of Launceston Council area also includes some small towns and rural localities such as Lilydale and Nunamara to the east and Swan Bay on the eastern side of the Tamar Estuary.

Launceston central business district (CBD) functions as the primary regional Activity Centre in Northern Tasmania. Launceston contains regional-scale, higher order community facilities and critical infrastructure for the Region, including Launceston General Hospital, UTAS Inveresk campus, Queen Victoria Museum/Art Gallery, Australian Maritime College and TasTAFE.

Launceston contains the most compact and dense built form and development patterns in the Region, with higher density buildings in the CBD, interspersed with a strong legacy of historic buildings. The CBD has a diverse mix of administrative, retail and other commercial uses.

While the City of Launceston offers rich cultural heritage and major amenities, emerging pockets of new subdivisions and existing suburban residential areas (i.e. Ravenswood) are distant from the city centre, services and infrastructure.

The natural environment shapes Launceston. It has direct access nature with Cataract Gorge and the Tamar Estuary on the doorstep of the CBD, and the surrounding hills and wilderness areas form a natural backdrop for the city. Because of Launceston's location at the confluence of rivers and a tidal estuary, flooding is a historic, current and future risk particularly to parts of the CBD and Invermay.

Climate Statistics¹⁰

- Average daily maximum temperature – 17.1°C
- Average daily minimum temperature – 7.1°C
- Average annual hot days (>30°C) – 2.9 days
- Average annual rainfall – 876mm

Key Launceston Statistics²⁶

72,672

Total population

4.10%

Aboriginal and Torres Strait Islander residents

31,369

Dwellings

39 years

Median age

19%

Population aged 65+

\$36,097

Median Individual Income

92.34%

Dwelling Occupancy

32.8%

Rented Dwellings
(% of total occupied private dwellings)

42,806

Workforce



Launceston homes reflected in the Tamar River
Dominic Zeng

Top 5 industries by employment²⁷

1. Health Care and Social Assistance (9,655 jobs)
2. Retail Trade (4,972 jobs)
3. Education and Training (4,216 jobs)
4. Construction (3,460 jobs)
5. Accommodation and Food Services (3,448 jobs)

Top 5 industries by output²⁸

1. Construction (\$1,720.5 million)
2. Manufacturing (\$1,524.1 million)
3. Health Care and Social Assistance (\$1, 414.4 million)
4. Rental, Hiring and Real Estate Services (\$1,076.2 million)
5. Financial and Insurance Services (\$842.9 million)



Esk Brewery
Nick Hanson Visuals

Harvest Launceston Farmers' Market
Rob Burnett



Inveresk Campus, UTAS
Ethos Urban



Macquarie House
Ethos Urban



QVMAG at Inveresk
Rob Burnett



Victorian-style terraces
Ethos Urban



What we heard so far from City of Launceston Council



People, communities and growth

Strengthen collaboration between councils to address regional growth and infrastructure needs.

The City of Launceston is developing a 30-year housing plan to address social and infrastructure challenges by moving away from car-dependent, fringe developments and instead promoting affordable, diverse housing near activity centres to better meet community needs.

Mismatch between housing demand and availability, especially for social housing; insufficient infrastructure in new developments.

Strategic planning for high-density, affordable housing in growth areas, and addressing the infrastructure gap in development projects.

Develop structure plans for growth areas, with coordination across councils and agencies to ensure long-term sustainability.

Ensure local character is maintained in the face of urban expansion, integrating unique features into planning.

Expand equitable service delivery, particularly in rural and isolated areas, to improve community health and education.

Address social issues through urban consolidation and targeted strategies to reduce inequalities and homelessness.

Increasing migration to central areas due to inadequate health and education services in rural regions.



Natural Environment, natural hazards, environmental risks

There is a need to balance residential growth while maintaining biodiversity.

Use flood modelling and coordinated planning to address climate change risks and mitigation, ensuring safe and sustainable development.

Challenges in addressing flood risks and settlement patterns due to climate change.

Preservation of native vegetation and maintaining Tasmania's ecological identity in urban environments.



Economic activity and infrastructure

Focus on closing infrastructure gaps and improving transport networks, particularly in growing suburbs.

Maximise infrastructure potential in areas like Western Junction and Bell Bay to leverage economic growth.

Gaps in infrastructure, particularly road networks and public transport, with major projects facing delivery challenges.

Need for strategic land use planning to balance industrial, commercial, and residential growth.

Misalignment between tourism marketing and the experiences of some residents, particularly in more disadvantaged outer suburbs where the realities of living do not match the "brand" that is promoted for the region or that is experienced in the inner city.

The Launceston CBD is an important economic hub, providing retail, offices and civic functions such as health services, cultural amenities, theatres and sports facilities. With the city's expected growth in population, it will be essential to expand and enhance the role of the CBD to meet evolving needs and sustain its role as the primary activity centre.

Local Planning Strategies

- [Greater Launceston Plan 2014 \(under revision\)](#)
- [Launceston Residential Strategy 2009–2029 \(2010\)](#)
- [City of Launceston 10-year Strategic Plan \(Draft\)](#)
- [Launceston Housing Plan 2025 - 2040 \(Draft\)](#)

** At the time of publishing this State of Play Report, City of Launceston Council has commenced community consultation for both a 10 year Strategic Plan and Housing Plan 2025–2040. Both plans actively acknowledge and respond to matters raised in the above observations and will contribute to the strategic directions of a renewed Northern Tasmania Regional Land Use Strategy.*

Meander Valley



Meander Valley is at the western edge of the Region, covering approximately 3,821 sq km. It extends from Prospect Vale in the east to Cradle Mountain in the west, and from Birralee in the north to the Western Tiers in the south.

Meander Valley is growing at a faster rate relative to other council areas in the Region, largely driven by Meander Valley's accessibility to the high-order centres of Launceston to the east and Devonport to the north-west. The majority of the population is located in the townships of Deloraine, Hadpsen, Westbury, Blackstone Heights and Prospect Vale, which functions as a suburb of greater Launceston. The population is distributed across a mix of rural, village and more urban lifestyle settings, townships are known for their strong, historic village character and large lots nestled within rural landscapes.

Key natural assets include the Tasmanian Wilderness World Heritage Area, Mole Creek National Park, Walls of Jerusalem National Park, Cradle Mountain – Lake St Clair National Park, and the Great Western Tiers.

Climate Statistics¹¹

- Average daily maximum temperature – 15.1°C
- Average daily minimum temperature – 5.4°C
- Average annual hot days (>30°C) –1.6 days
- Average annual rainfall – 1234.9mm

Key Meander Valley Statistics²⁹

21,517

Total population

3.7%

Aboriginal and Torres Strait Islander residents

9,276

Dwellings

46 years

Median age

23.9%

Population aged 65+

\$34,864

Median Individual Income

92.93%

Dwelling Occupancy

20%

Rented Dwellings
(% of total occupied private dwellings)

5,672

Workforce



House built in 1912 in Deloraine
Ethos Urban

Top 5 industries by employment³⁰

1. Agriculture, Forestry and Fishing (1,056 jobs)
2. Construction (741 jobs)
3. Health Care and Social Assistance (530 jobs)
4. Accommodation and Food Services (501 jobs)
5. Retail Trade (488 jobs)

Top 5 industries by output³¹

1. Manufacturing (\$520.0 million)
2. Agriculture, Forestry and Fishing (\$428.6 million)
3. Construction (\$374.1 million)
4. Rental, Hiring and Real Estate Services (\$192.0 million)
5. Arts and Recreation Services (\$91.9 million)



Fly fishing on the Meander River
Samuel Shelley



The Big Wickets, Westbury
Chris Crerar



Oddfellows Hall, Deloraine
Chris Crerar



A farm near Deloraine
Graham Freeman



Typical housing stock seen across towns in Meander Valley
Ethos Urban

What we heard so far from Meander Valley Council



People, communities and growth

Following historical tensions, there is a renewed focus upon meaningfully engaging with, and building awareness and respect for, First Nations peoples and Aboriginal cultural heritage.

Opportunity to preserve the unique character and heritage of Meander Valley by integrating environmental and cultural values into development plans.

Rapid population growth in the eastern settlements but an ageing population overall. In part, due to out-flow of younger people from Meander Valley, particularly from the west of Meander Valley (eg. Deloraine).

Opportunity to leverage population growth to increase regional development and appeal to lifestyle migrants. Strategies to accommodate an ageing population with smaller housing options and better services could boost liveability.

Housing affordability is a growing concern, especially for smaller families and ageing populations.

Increasing demand for smaller, affordable homes creates opportunities for development focused on accommodating ageing residents. Potential to balance density with preservation of town character, especially in Westbury.

Some social disparities within Meander Valley with the eastern areas more advantaged than the west, largely due to proximity to Launceston.



Natural Environment, natural hazards, environmental risks

The shift toward urban-style development in places like Westbury offers the chance to thoughtfully integrate higher-density development with community values and environmental sustainability.

Risk of losing local environmental values, including urban wildlife, due to development as a result of insufficient planning regulations for managing ecological impacts.

The region's natural beauty, including the Great Western Tiers and the appeal of Meander Valley's lifestyle could attract new residents and visitors, contributing to economic growth.

Risks from bushfires, flooding and landslides in various areas, particularly the risk of isolated communities during floods and bushfires.



Economic activity and infrastructure

Addressing infrastructure needs, especially wastewater and transport, could unlock significant development potential, particularly in areas like Westbury and Hadpsen.

The region's agricultural and tourism industries, including poppies, offer economic growth potential. Renewable energy projects, like solar farms, could be further explored to diversify the economy.

Strengthening the relationship between local and state governments could improve planning outcomes, especially in terms of critical infrastructure investments.

Limited infrastructure capacity, especially around wastewater, stormwater, and transport. Issues with sewerage treatment plant capacity in towns like Westbury, Hadspen and Prospect Vale, as well as inadequate road networks.

Development costs and infrastructure limitations, particularly in the Valley Central Industrial Area, and reliance on Devonport for port and rail infrastructure.

Tensions around lack of investment in critical infrastructure, such as improving the State Road Network and the inadequate availability of State Government public transport options for residents to Launceston.

Local Planning Strategies

- [2024 – 2034 Strategic Plan \(2024\)](#)
- [Deloraine Outline Development Plan 2016](#)
- [Prospect Vale – Blackstone Heights Structure Plan 2015 \(under review\)](#)
- [Westbury Outline Development Plan 2013](#)
- [Hadspen Outline Development Plan and Master Plan 2011](#)

Northern Midlands

The Northern Midlands is a large and diverse council covering an area of approximately 5,133 sq km. Approximately 95% of land in the Northern Midlands is occupied by agricultural uses.

Many residents are attracted to the northern towns of Longford, Evandale, Perth and Cressy, and the residential estate of Devon Hills. In the southern part of the municipality, the population is concentrated in Campbell Town, Ross and Avoca. Whilst seasonal workers contribute to temporary population increases, there has been a shift with seasonal workers opting towards more semi-permanent living.

Alongside the area's scenic landscapes, expansive grazing lands and river corridors, the presence of colonial Georgian architecture is a key feature of the area and is highly valued by residents and visitors. Most heritage sites are state listed and include historic buildings, trees and hedges, including the World Heritage Listed convict-built Brickendon and Woolmers Estates. Launceston Airport, the Region's major airport, is located in the Northern Midlands. The adjacent TRANSlink industrial estate supports a range of industrial uses, with potential for further expansion.

Climate Statistics¹²

- Average daily maximum temperature – 16.7°C
- Average daily minimum temperature – 6.1°C
- Average annual hot days (>30°C) – 4.6 days
- Average annual rainfall – 616.3mm

Key Northern Midlands Statistics³²

14,344

Total population

3.1%

Aboriginal and Torres Strait Islander residents

6,444

Dwellings

46 years

Median age

24.1%

Population aged 65+

\$35,516

Median Individual Income

89.34%

Dwelling Occupancy

20%

Rented Dwellings
(% of total occupied private dwellings)

5,991

Workforce



The Red Bridge in Campbell Town, built in 1838
Ethos Urban

Top 5 industries by employment³³

1. Agriculture, Forestry and Fishing (1,134 jobs)
2. Manufacturing (782 jobs)
3. Construction (630 jobs)
4. Health Care and Social Assistance (536 jobs)
5. Transport, Postal and Warehousing (526 jobs)

Top 5 industries by output³⁴

1. Manufacturing (\$499.0 million)
2. Agriculture, Forestry and Fishing (\$450.9 million)
3. Construction (\$342.0 million)
4. Transport, Postal and Warehousing (\$234.1 million)
5. Rental, Hiring and Real Estate Services (\$183.7 million)



What we heard so far from Northern Midlands Council



People, communities and growth

Heritage management struggles with conflicting regulations between preserving old structures and adapting to new ones.

Opportunities to engage with Aboriginal people and embed knowledge and practices in planning are constrained by lack of structures, policies and practices to incorporate Aboriginal heritage and achieving consensus among **Aboriginal** groups.

Perth's rapid population growth presents opportunities for infrastructure development and attracting young families. Seasonal workers can contribute to the workforce in agriculture, aged care, and other sectors.

Smaller towns are experiencing rapidly aging populations, while larger towns closer to Launceston are accommodating younger families, resulting in inequities between Northern Midlands communities.

Subdivisions and new developments provide opportunities for community growth, with positive community engagement in improvements like accessible playgrounds. Upgrading regional centres and addressing residential growth in areas like Perth and Longford.



Natural Environment, natural hazards, environmental risks

Opportunities to strengthen flood management and preparedness, as well as addressing climate change through community initiatives and policies.

Major flood risks, especially in Longford and Ross, with shifting regulations creating frustration. Bushfire risks and challenges in flood management complicate preparedness and response efforts.



Economic activity and infrastructure

The region's agricultural base, including hemp production and other sustainable businesses, offers economic growth. Home-based businesses and local employment opportunities, such as in Campbell Town's health sector, contribute to local development.

Need to ensure sufficient commercial land for business opportunities.

There are needs to upgrade infrastructure to match demand from population growth in some parts of Northern Midlands, including expanding power supply and improving stormwater management and upgrading ageing infrastructure that was not designed to accommodate the growth that has occurred.

An imbalance between the availability of land for residential development relative to increasing the supply of land for commercial, industrial and services and infrastructure uses risks inequitable access to amenities and infrastructure.

Local Planning Strategies

- [Northern Midlands Council Strategic Plan 2021-2027 \(2021\)](#)
- [Northern Midlands Council Health and Wellbeing Strategy 2024](#)
- [Northern Midlands Council Communications and Engagement Strategy 2024](#)
- [Northern Midlands Council Economic Development Strategy 2024](#)
- [Northern Midlands Council Priority Projects 2024](#)

West Tamar



West Tamar encompasses the western bank of the River Tamar from the suburban area of Riverside, extending north to Bass Strait and west to Frankford. It comprises the townships of Beaconsfield, Beauty Point, Exeter and Legana, which offer a mix of suburban and rural residential living.

The suburban areas of West Tamar, including part of Trevallyn, Riverside and increasingly Legana form part of the Greater Launceston metropolitan area.

Tamar Valley, bounded by the River Tamar to the east and mountain ranges to the west, is a key natural asset of the area. It comprises several highly valued natural attractions including the Narawntapu National Park, Notley Fern Gorge, Tamar Wetlands, and the River Tamar. The Tamar Valley supports specialist sparkling wine producers, fruit orchards, and other high value agriculture.

West Tamar also features state-listed heritage sites including the York Town settlement and the Beaconsfield Mine and Heritage Centre.

Climate Statistics¹³

- Average daily maximum temperature – 17.7°C
- Average daily minimum temperature – 8.2°C
- Average annual hot days (>30°C) – 1.7 days
- Average annual rainfall – 784.9mm

Key West Tamar Statistics³⁵

26,358

Total population

2.8%

Aboriginal and Torres Strait Islander residents

11,308

Dwellings

45 years

Median age

23.2%

Population aged 65+

\$36,414

Median Individual Income

89.95%

Dwelling Occupancy

18%

Rented Dwellings
(% of total occupied private dwellings)

4,589

Workforce



The banks of the Tamar River
West Tamar Council

Top 5 industries by employment³⁶

1. Health Care and Social Assistance (731 jobs)
2. Education and Training (668 jobs)
3. Construction (508 jobs)
4. Retail Trade (462 jobs)
5. Accommodation and Food Services (405 jobs)

Top 5 industries by output³⁷

1. Construction (\$257.1 million)
2. Rental, Hiring and Real Estate Services (\$209.1 million)
3. Manufacturing (\$156.8 million)
4. Agriculture, Forestry and Fishing (\$131.2 million)
5. Health Care and Social Assistance (\$111.7 million)

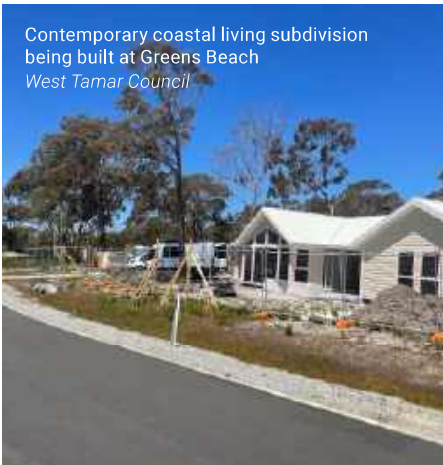
Beaconsfield District Health Service
Ethos Urban



Typical recent subdivision
housing near Riverside
Ethos Urban



Contemporary coastal living subdivision
being built at Greens Beach
West Tamar Council



Batman Bridge, Tamar River
West Tamar Council



Glendale Vineyard, Kelso
Rob Burnett



What we heard so far from West Tamar Council



People, communities and growth

As one of the highest growth municipalities in Tasmania, planning for continued growth is being carefully considered through the development of a West Tamar Growth Strategy and the review of Structure Plans.

New community services, including health clinics and schools, provide an opportunity to service a growing and ageing population, and encourage younger families to move to the region.

Willingness to support diverse housing types offers an opportunity to facilitate sustainable growth, while maintaining community values. Community conversations are required to facilitate a change in development patterns in areas where higher-density residential development is possible.

The movement of younger families to areas like Legana presents opportunities for expanding housing and services to meet growing demand.

Strategic planning should address the potential encroachment of residential areas on agricultural land.

There is opportunity for increased recognition of Historic Cultural Heritage in West Tamar. Lack of recognition limits opportunities to preserve heritage while accommodating population and economic growth.

There is potential for improved engagement with the Aboriginal community and greater recognition of Aboriginal cultural heritage sites to enhance cultural awareness.



Natural Environment, natural hazards, environmental risks

An abundance of natural attractions and environmental values provide tourism and lifestyle opportunities throughout the northern and western areas of the West Tamar.

The municipality is exposed to extensive areas of coastline which increases risk from climate variability, including potential for increased inundation, erosion and landslip.

Over-capacity wastewater infrastructure is a potential threat to water quality.

Landslips are becoming more frequent in certain areas, with a higher risk where there is heavy reliance on on-site wastewater systems.



Economic activity and infrastructure

Coordinated investment in sewerage and water infrastructure is necessary to support future development and address capacity issues.

Expanding tourism around vineyards, wineries, and distilleries can increase local economic growth.

Expanding and diversifying employment opportunities in Bell Bay will support residential growth and supply chain opportunities in the West Tamar.

The increasing demand for health services and lack of youth spaces highlight the challenge of providing adequate community infrastructure.

The ageing population, along with the traffic congestion caused by commuting, presents challenges in addressing local service requirements and improving infrastructure. Increasing local employment opportunities could provide improved transport outcomes.

Limited developer contributions and limited options for higher-density developments create challenges in balancing community needs with development pressures.

Traffic congestion and limited public transport options hinder mobility and regional development, requiring significant infrastructure improvements, particularly on key routes such as the West Tamar Highway.

Local Planning Strategies

- [West Tamar Growth Strategy 2025](#)
- [Draft Exeter and District Structure Plan 2023](#)
- [Legana Structure Plan 2025](#)
- [West Tamar Trail Strategy 2022](#)
- West Tamar Community, Health and Wellbeing Plan – What's Best for the West 2024

PART 3 — THE STATE OF THE REGION



Part 3 includes three themes covering nine topics that are relevant to the preparation of a Regional Land Use Strategy for Northern Tasmania. The themes have been developed through research, analysis and the outcomes of engagement with stakeholders including the eight councils, State agencies and utilities companies.

Each theme documents understanding of the regional dynamics, priorities, and issues in Northern Tasmania. There is a summary of opportunities and challenges for each theme, which brings together the often overlapping and inter-related findings from analysis of each topic.

	THEME 1 People, Communities & Growth	• Cultural Heritage & Values • Population Growth & Change • Housing, Placemaking & Growth • Social Infrastructure
	THEME 2 Climate, Landscape, Environmental Values, Natural Hazards & Environmental Risks	• Natural Environment, Landscape Character & Climate • Natural Hazards & Environmental Risks
	THEME 3 Economic Activity & Infrastructure	• Economic Activity & Productivity • Movement & Connectivity • Utilities



THEME 1

People, Communities & Growth

3.1 Theme 1: People, Communities & Growth

3.1.1 Cultural Heritage & Values

Aboriginal cultural heritage

The palawa represent one of the oldest continuous cultures in the world. They are the traditional and original owners of lutruwita (Tasmania) and have cared for the land for more than 40,000 years.

Northern Tasmania is a rich Aboriginal cultural landscape. A number of natural landscapes across the Northern Region provide evidence of generations of sovereign ownership and land management. The various waterways and natural reserves which define the Region and eastern coastline between Break O'Day, Dorset and Flinders are vital to help us understand Aboriginal occupation, including resource gathering and traditional cultural land practices.

Northern Tasmania encompasses some rich, culturally significant land, waterways and stories, many of which are still being rediscovered. Places such as Wybalenna on the west coast of Flinders Island hold great historical importance to Aboriginal people. Hundreds of people died while exiled at Wybalenna in the 1830s, waiting to return to the mainland of Tasmania.

Other significant places include but are not limited to:

- truwana, also known as Cape Barren Island, south of Flinders Island
- lungtalanana, situated south of truwana
- wukalina, located within the Mt William National Park
- larapuna, also known as Eddystone Point, located adjacent to the Mt William National Park (larapuna is also the Aboriginal name for the Bay of Fires)

Aboriginal heritage, places and landscapes serve as invaluable reminders of the ancient and enduring culture of the Aboriginal people in Northern Tasmania. Aboriginal cultural connections to land, water and sky are one of the reasons a significant proportion of the western Region is listed within the Tasmanian Wilderness World Heritage Area.

Planning for Country

Planning for Country refers to how Northern Tasmania might start to integrate Aboriginal knowledge of Country into land use planning practice. Embracing a Country-First approach to planning aims to actively engage palawa by sharing their knowledge and cultural connections to the land, water, and sky, while also supporting Aboriginal people and organisations in achieving their land aspirations and strengthening self-determination.

The draft Tasmanian Planning Policies at the State level emphasise the significance of recognising and involving Tasmanian Aboriginal people in the planning system. The new NTRLUS is an opportunity to recognise the importance and valuable contributions of Aboriginal culture, knowledge and land management at a regional scale and in guiding planning and development at the local level.

Through ongoing engagement with palawa groups and individuals, the NTRLUS can support the interests and aspirations of the palawa community, and apply palawa knowledge to land use planning.

Historic Cultural Heritage

European exploration of the Northern Tasmania Region of Tasmania was a gradual process interwoven with colonial settlement. The first European settlers in the Northern Region arrived in the early 1800's. Launceston is one of Australia's oldest cities, settled in March 1806. The Region boasts a rich cultural and architectural heritage, with a multitude of conserved historic places and heritage items, including Colonial and Victorian buildings clustered throughout, particularly in George Town, Launceston and the towns, villages and rural areas in the southern parts of the Region.

Natural and cultural heritage are inter-twined in the Region. The west of Northern Tasmania is framed by the Cradle Mountain / Lake St Clair National Park and Central Plateau Conservation Area, which are part of the Tasmanian Wilderness World Heritage Area. The rugged landscape is of high ecological, historic and cultural value and provides a natural backdrop and boundary for parts of the Region.

The Region's heritage places and historic landscapes help to tell important cultural stories, record growth and change across the different local government areas and demonstrate how communities have grown and changed since colonisation. These structures are preserved and protected under a framework of heritage legislation at different levels, including World, National, Commonwealth, State, and Local regulations.

The most common type of heritage acknowledgement in the Region is through the State register. The limited local recognition leaves characterful, but perhaps less significant buildings without protection. There are 1,815 individual listings in the Region on the Tasmanian Heritage Register, with most items concentrated in Launceston, Break O'Day, Northern Midlands and Meander Valley. The heritage places include parklands, colonial villages, national trust mansions, working historic farms, Victorian and Georgian houses, mining and maritime landmarks, churches and other institutional buildings.

Climate change increasingly poses risks to some heritage areas, sites and historic structures. Rising temperatures, extreme weather events, and changes in water tables can accelerate deterioration and structural damage. Building materials such as timber and masonry require effective protection and reinforcement to adapt to destabilising climate conditions.

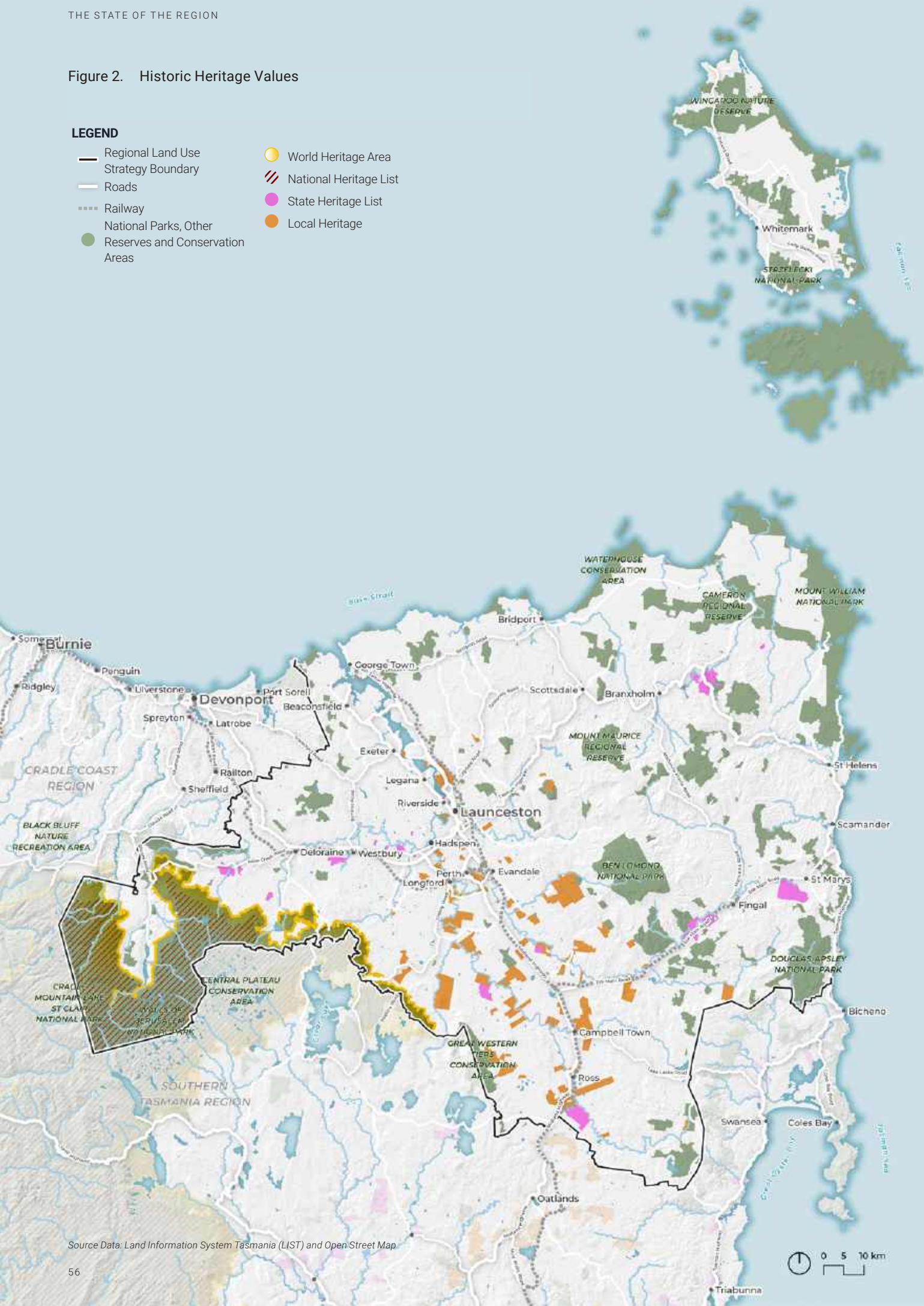
Land use planning in the Region should aim to achieve a balance between facilitating growth and the re-use and revitalisation of heritage places and their surrounds, while preserving features of cultural significance that are important reminders of the area's history. Historical and architectural heritage is not fixed, and future land use strategies can create frameworks that enable historic sites to be enhanced and adapted to contribute to contemporary life while also being preserved. Appropriately recognising heritage values is an integral aspect of planning for the growth and development of established core areas, as well as the remote outer towns and villages in the Region.



Figure 2. Historic Heritage Values

LEGEND

- Regional Land Use
- Strategy Boundary
- Roads
- Railway
- National Parks, Other
- Reserves and Conservation Areas
- World Heritage Area
- ▨ National Heritage List
- State Heritage List
- Local Heritage



Source Data: Land Information System Tasmania (LIST) and Open Street Map

3.1.2 Population Growth and Change

Region's population now

An estimated 157,373 people were living in Northern Tasmania in 2023. The Region has sustained annualised average population growth of 1.2% over the last 5 years, growing by more than +13,700 people between 2011 and 2023, with much of this growth occurring in the past 5 years (+9,364 persons).

In summary, Northern Tasmania has³⁸:



157,373

People

Supporting 27.4% of Tasmania's population



43 years

Median age

Higher than the nations median of 38 years



3.9%

Aboriginal and Torres Strait Islander residents

Compared to Australia overall 3.2%



2.39

Persons per dwelling

Higher average household sizes in Meander Valley and West Tamar

Households comprise of:

- 29.4% of households are people living alone.
- 29.8% of households are couples with no children.
- 23.6% of households are couples with children.

Forecasted Population Growth and Change

Population forecasts for Northern Tasmania estimate a total increase of 28,060 people in the 23 years from 2023 to 2046. This is a growth rate of just under 0.7% per year, slightly lower than the past 12 years (+0.8pa).

The forecasts also estimate the population will get significantly older, with around a third of all population growth (33.0%) forecast to be people aged 65 years and over by 2046. The Region's ageing population is driven largely by low and decreasing birth rates and migration of young adults to other Australian states³⁹.

An older population creates challenges for the Region:

- Shifting and specialised requirements for the types and locations of housing
- Increased demand for social services such as health care
- Lower economic productivity (per person) due to lower workforce participation rates and less productive industry sectors.

Northern Tasmania also contains many remote and small rural townships, and those parts of the Region that are further from services like health care in Launceston, typically have much older populations. Continued ageing of the population in these areas will make it harder for residents to access services they need for health and wellbeing, or increase costs due to the need to deliver more services locally.

Reasons for younger people leaving the Region include a lack of secure, high-value and well-paid jobs, a real and perceived lack of education opportunities, competition for housing and declining affordability and choice, access to services, and lifestyle choices. There is also movement of younger people within the Region from rural and more remote parts of Northern Tasmania to pursue education and employment opportunities in Launceston⁴⁰. This trend also accentuates ageing in these outer parts of the Region, illustrated by the stark differences in average age between remote council areas like Flinders and Break O'Day compared to City of Launceston.

The Region is also seeing younger families relocating from urban to peri-urban areas due to housing affordability and availability, and older residents migrating to coastal towns for lifestyle preferences. These trends create pressures on infrastructure needed to support and the affordability of existing housing stock.

Northern Tasmania's changing population and demographic shifts have implications for housing supply, the type of housing and where it is located, and how best to improve accessibility. In recent decades there has been a predominance of low-density housing which has led to underutilised land and a lack of housing choice. Urban renewal of existing residential areas, higher levels of infill development in accessible locations, and greater housing diversity are ways to facilitate more affordable and suitable housing, ageing in place and downsizing.

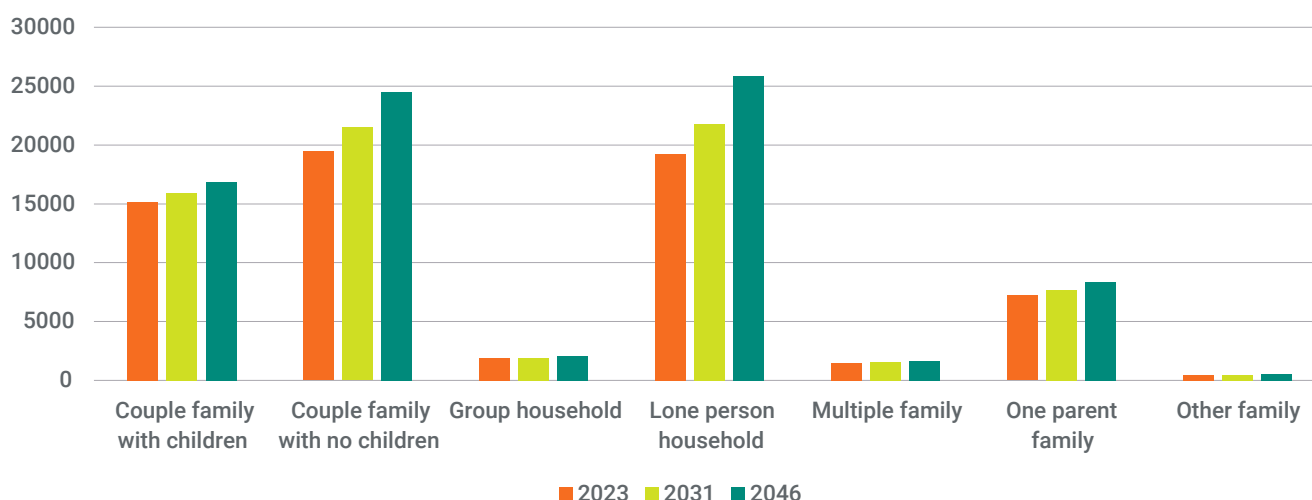


Figure 3. Northern Tasmania Forecast Household Composition
Source: Remplan Forecast (2021)

Key Statistics⁴¹



2.29 ↓

Persons per dwelling by 2041

Average household size of 2.39 in 2023, decreasing to 2.29 persons per dwelling by 2041



+16,725

More dwellings needed

between 2023 and 2046 with City of Launceston anticipating demand for almost 40.0% of this growth requirement.



32.4% ↑

Of all households will be occupied by lone persons

By 2046, 25,858 in total will be occupied by lone persons. Which equates to an additional 6,648 lone-person households, requiring more smaller and diverse dwellings.

The Department of Treasury and Finance released new population projections for Tasmania in May 2024. Anticipated birth rates, life expectancy and migration to and from Tasmania inform a range of projection scenarios, with differences in the total population and the rate of population growth between them. The variance is due to different assumptions about how many people will move to or from Tasmania from overseas or interstate.

Population projections are a key input to the Regional Land Use Strategies. The different forecast scenarios illustrate the uncertainty around how much the population will grow, particularly over the longer-term planning timeframe for the NTRLUS. The influence of both interstate and overseas migration has been significant for the Northern Tasmania Region particularly over the last 10 years.

Changes to migration patterns will probably occur over the next 25 years. The high variability and unpredictability of population growth highlights the challenges of planning for growth in the Region, and the need for the NTRLUS to be adaptable to changing circumstances. The population projections are a starting point for considering how much growth needs to be accommodated, and where population growth and change will occur across the Region.

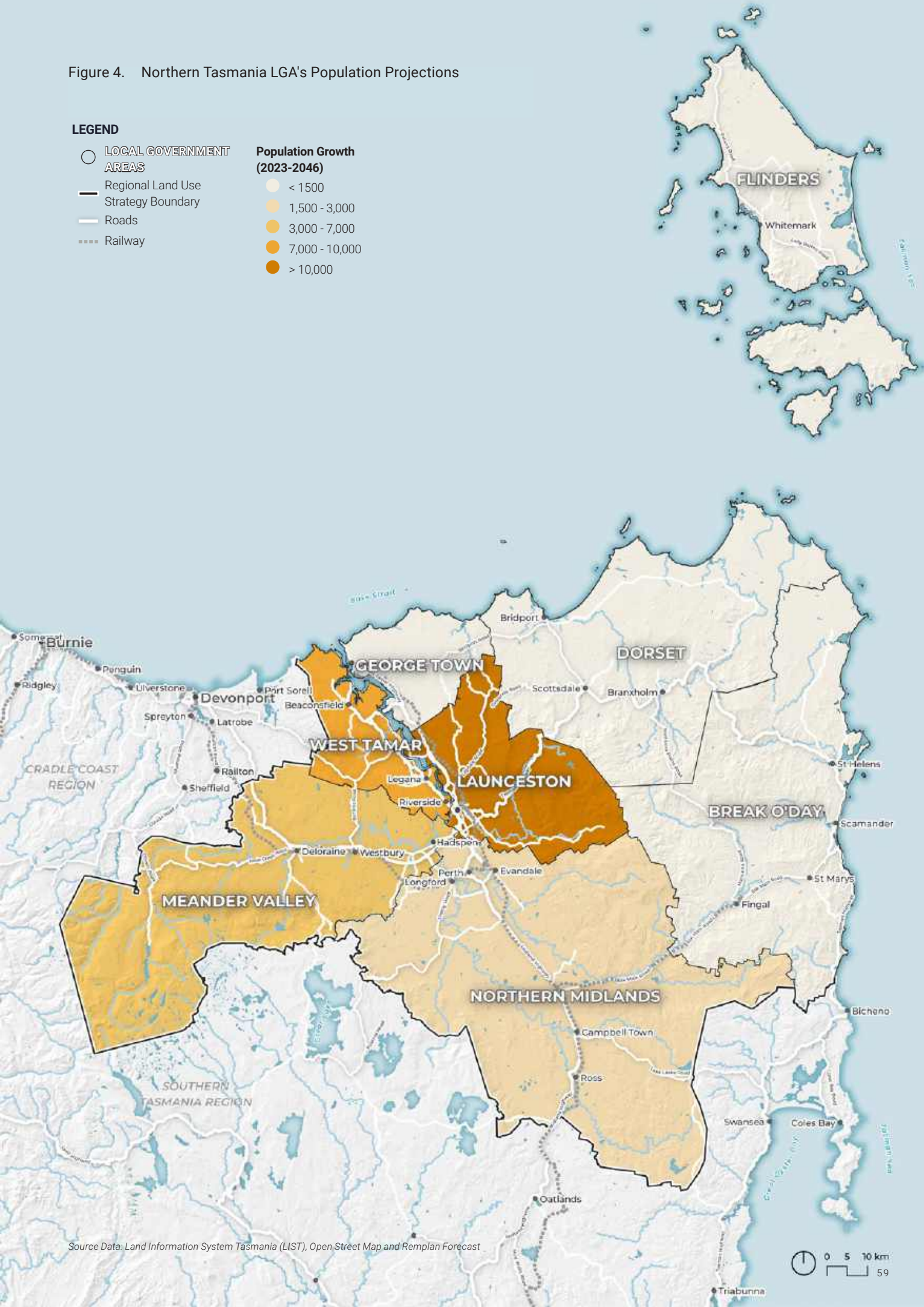
Forecast Population Growth and Distribution

The largest forecast growth in Northern Tasmania is expected to occur in the Greater Launceston metropolitan region, which includes parts of Launceston, West Tamar, Meander Valley and Northern Midlands. Historically, Launceston, West Tamar and Meander Valley have also been the fastest growing councils. This has driven the expansion of commuter suburbs in areas such as Legana and Perth, which provide affordability and land availability, whilst maintaining proximity and access to employment and regional services which are largely focused on Launceston.

Climate change will have a strong influence on forecast population growth and distribution patterns in the next 25 years, including potential growth driven by climate migration and relocation and the impact of natural hazards, including flooding and coastal hazards on at-risk communities.

Considerable work is also being carried out by the City of Launceston to identify and facilitate locations for urban consolidation and infill. In the present circumstances, there are notable financial obstacles to pursuing these projects, and typically only those that receive government subsidies are being pursued.

Figure 4. Northern Tasmania LGA's Population Projections



Source Data: Land Information System Tasmania (LIST), Open Street Map and Remplan Forecast

Forecast Population	2023	2026	2031	2036	2041	2046	Change	LGA Share of Region Growth
Break O'Day	7,084	7,287	7,621	7,926	8,205	8,461	1,377	4.9%
Dorset	7,068	7,229	7,491	7,728	7,957	8,179	1,111	4.0%
Flinders (Tas.)	939	946	974	988	1,011	1,023	84	0.3%
George Town	7,391	7,649	8,058	8,378	8,639	8,872	1,481	5.3%
Launceston	72,672	74,449	77,011	79,268	81,559	83,838	11,166	39.8%
Meander Valley	21,517	21,977	22,688	23,335	23,985	24,599	3,082	11.0%
Northern Midlands	14,344	14,855	15,503	16,022	16,444	16,769	2,425	8.6%
West Tamar	26,358	27,518	29,233	30,834	32,275	33,692	7,334	26.1%
Northern Tasmania	157,373	161,910	168,579	174,479	180,075	185,433	28,060	100.0%

Table 2. Northern Tasmania Forecast Population Growth across LGA's
Source: Remplan forecast 2021

The population is anticipated to change in size and composition. This means housing needs will also change over the next 30 years. Implementation of housing policies and strategies through the new NTRLUS has the potential to change how population growth is distributed across the Region compared to the current forecasts shown on Figure 5.

Social Wellbeing

Climate change is increasingly being recognised as an impact on social well-being. Issues such as climate anxiety are emerging across communities as climate impacts and disasters are experienced. Additionally, it is recognised that areas of disadvantage are disproportionately impacted by the direct and indirect impacts of climate change.

Wellbeing, income, and access to opportunities vary across Northern Tasmania. Figure 5 shows the SEIFA index for the Northern Tasmania Region based on the 2021 census. Rates of disadvantage generally increases with distance from Launceston, with particular areas of disadvantage in remote areas in the eastern and western extents of the Region. Disadvantage in these areas is often a result of lower incomes, access to fewer services and facilities, lower educational attainment, lower skills base or isolation to the mainland of Tasmania.

City of Launceston has pockets of disadvantage interspersed with relatively advantaged areas. The pockets of disadvantage within urban areas are closely linked to high unemployment rates and lower education and health outcomes. Launceston is also facing rising levels of homelessness in certain areas which have been left poorly serviced and significant disparities between different suburbs. Conversely, suburbs to the south of Launceston and areas within and surrounding the townships of Riverside, Legana and Exeter, exhibit the greatest advantage within the Region.

Northern Tasmania has low rates of education attainment. Whilst an increasing share of residents are completing post graduate studies, many residents in Northern Tasmania leave the island to seek education opportunities and more skilled and higher paying jobs elsewhere.

Whilst, Launceston is seeing an increasing proportion of international students attending university and staying on post-completion of study, the community's perception of the Region's education system and job offerings has a direct influence on population retention, growth and wellbeing.

The relationship between education standards, employment and quality of life is intricate and carries implications for industry growth. Populations with low levels of educational attainment contribute to social factors such as low income, unemployment, health issues, and a lack of necessary qualifications for high-value industries and jobs that drive real wage growth and economic activity. Consequently, the shortage of suitably qualified employees poses a challenge for growing businesses and limits opportunities for emerging industries which further constrains the capacity to attract and retain workers in the Region.

Some of the indicators of wellbeing in Northern Tasmania include⁴²:

Income



\$34,529

per annum

The median individual income for Northern Tasmania compared with \$42,940 per annum for Australia.

Higher incomes ↑

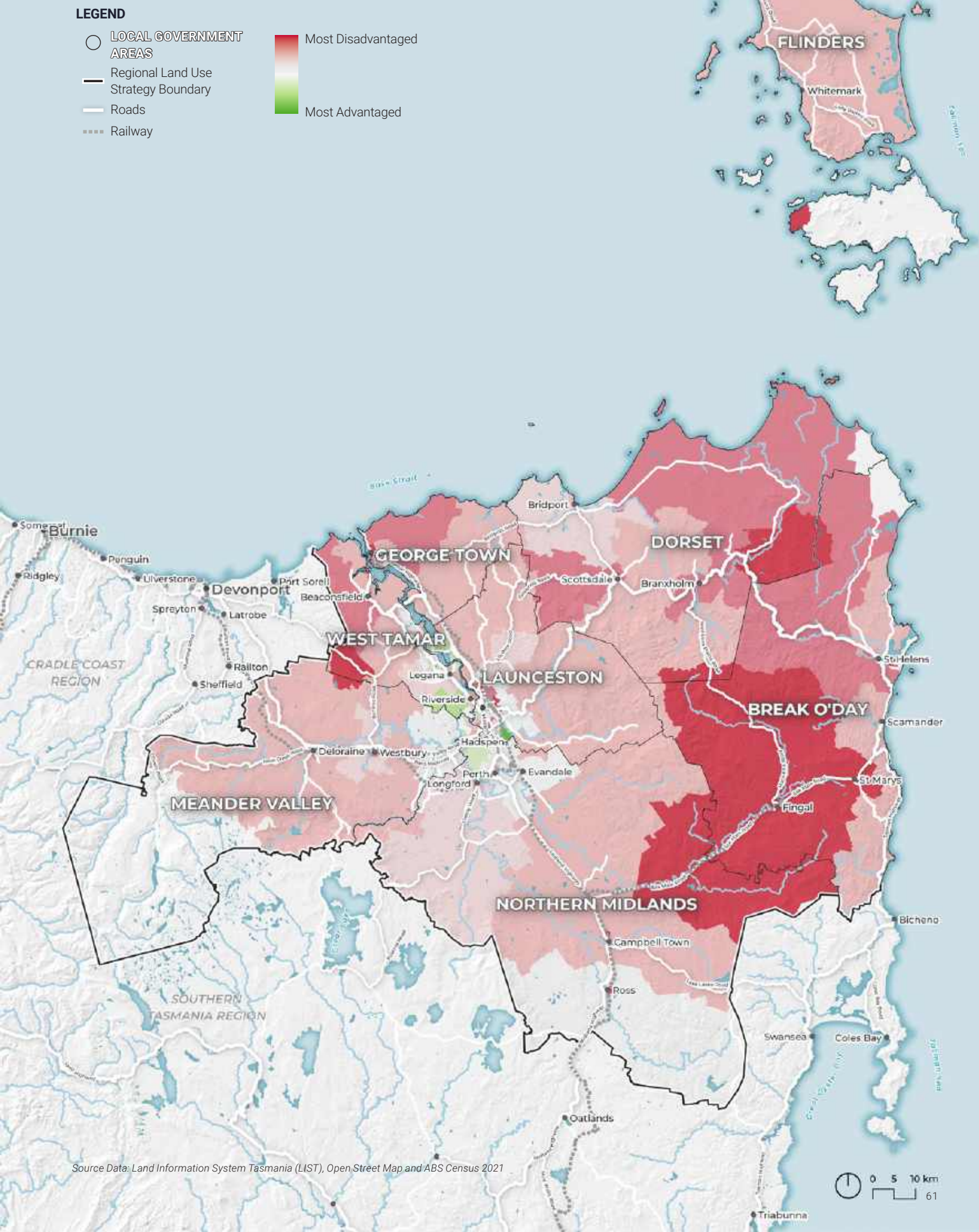
West Tamar and Launceston

Lower incomes ↓

Break O'Day and George Town

**Indicators continue overleaf*

Figure 5. Northern Tasmania socio-economic index of advantage and disadvantage 2021



Unemployment



3.80%

Unemployment rate

In Northern Tasmania compared with 3.11% across Australia

Over 6.5%

High unemployment

In Break O'Day & George Town

Education



41.4%

Completed Year 12

Northern Tasmanian residents, compared to 57% in Australia

47.9%

Post-school qualifications

Northern Tasmanians residents aged 15 years, compared to 52% in Australia. This includes vocational training and higher education.

Housing

Housing is a basic requirement and access to housing is a fundamental right for all people⁴³. There needs to be enough housing to meet demand, and housing should be suitable, affordable and delivered in appropriate locations. Both the Tasmanian Housing Strategy and the draft Tasmanian Planning Policies emphasise the need to deliver homes that are close to social and physical infrastructure, local services and employment opportunities.

The Tasmanian Housing Strategy 2023 – 2043 prioritises:

- Delivering more quality homes, faster
- Supporting people in need
- Improving the affordability and stability of private/market housing
- Enabling local prosperity

In Northern Tasmania, these priorities mean that there should be an adequate supply of homes to meet demand, homes should be constructed in the right locations, and diversity of housing types should be delivered to accommodate evolving needs, and to ensure housing supports the growth of sustainable communities with access to employment, education, and services.

Housing location

Whilst there has been a shift in focus towards opportunities for infill and consolidation in core areas, the majority of new housing across the Region has historically been delivered in greenfield areas. There has been growing interest and expansion of peri-urban fringe, particularly in key townships of West Tamar, Meander Valley and Northern Midlands Councils. Alongside this pattern but to a lesser extent, Councils with coastal settlements are also emerging as attractive lifestyle locations that are still seen as commutable, especially in comparison by those who may have moved to Tasmania from the mainland. The creation of new residential areas on the interface of hazardous bushfire-prone areas is an issue requiring careful consideration.

The City of Launceston is developing structure plans to guide residential growth over the next 30 years in Alanvale, St Leonards, Waverley, and South Prospect. These plans focus on creating walkable neighborhoods linked to new local activity centers, with diverse housing options, including high-density developments within these centers. To support sustainable growth, infrastructure funding frameworks are being developed alongside the plans, ensuring a holistic approach to parks, sustainable transport, and essential services.

3.1.3 Housing, Placemaking & Growth

The delivery of new dwellings is intrinsically linked to 'placemaking', sustainable growth, and the creation of liveable commercial, civic, and cultural hubs. Neighbourhoods without access to necessary services, jobs and entertainment, are less economically viable and socially sustainable. This viability is often what translates to activation and 'placemaking' or a sense of vibrancy in our towns and villages and therefore impacts where growth is likely to continue to occur.

When housing is located to facilitate access to jobs, entertainment, recreation and social services, the quality of life of that community is directly improved, businesses are more viable and government services and infrastructure are more cost effective. The costs to households are also often lower as people spend less time travelling, transport costs are lower, and the costs of delivering new development and housing is reduced by being closer to infrastructure and services delivery. Decisions about how many houses, what types of houses and where new housing is located are an important part of managing growth in metropolitan areas like greater Launceston, but are also key when considering settlement patterns and housing typologies in smaller coastal and rural towns.

Supply and demand for residential land is inconsistent across the Northern Region. Some areas are considered highly constrained with current supply too low to meet forecast housing demand, whilst there is sufficient residential zoned land in certain areas.⁴⁴

As shown by Table 2, since the 2016/17 financial year:

- Over a third of new dwelling approvals in the Region were in the City of Launceston.
- The Councils of West Tamar, Meander Valley and Northern Midlands, which all immediately surround Launceston, have displayed high growth accounting for a total of 48.3% of the Region's dwelling approvals.
- The remaining mainland Council areas of Break O'Day, George Town and Dorset combined account for 17.2%, of dwelling approvals.
- Flinders accounts for just over 1% of dwelling approvals across the Region, but new dwelling approvals are more than double the share of the population, indicating more dwellings may be for purposes other than permanent residents.

Younger couples and families are often drawn to newer suburbs in the greater Launceston area due to there being ample supply and therefore more affordable housing options. However, some younger families are increasingly drawn to rural or coastal settlements due to lifestyle and environmental factors, as well as lower land prices and availability. The Region's older population are also attracted to the more lifestyle-focused and community-orientated coastal areas.

The more established areas of Launceston have historically been attractive for migrants, however there are patterns of this group relocating from inner-city areas to new subdivisions in outer suburbs in search of more affordable housing.

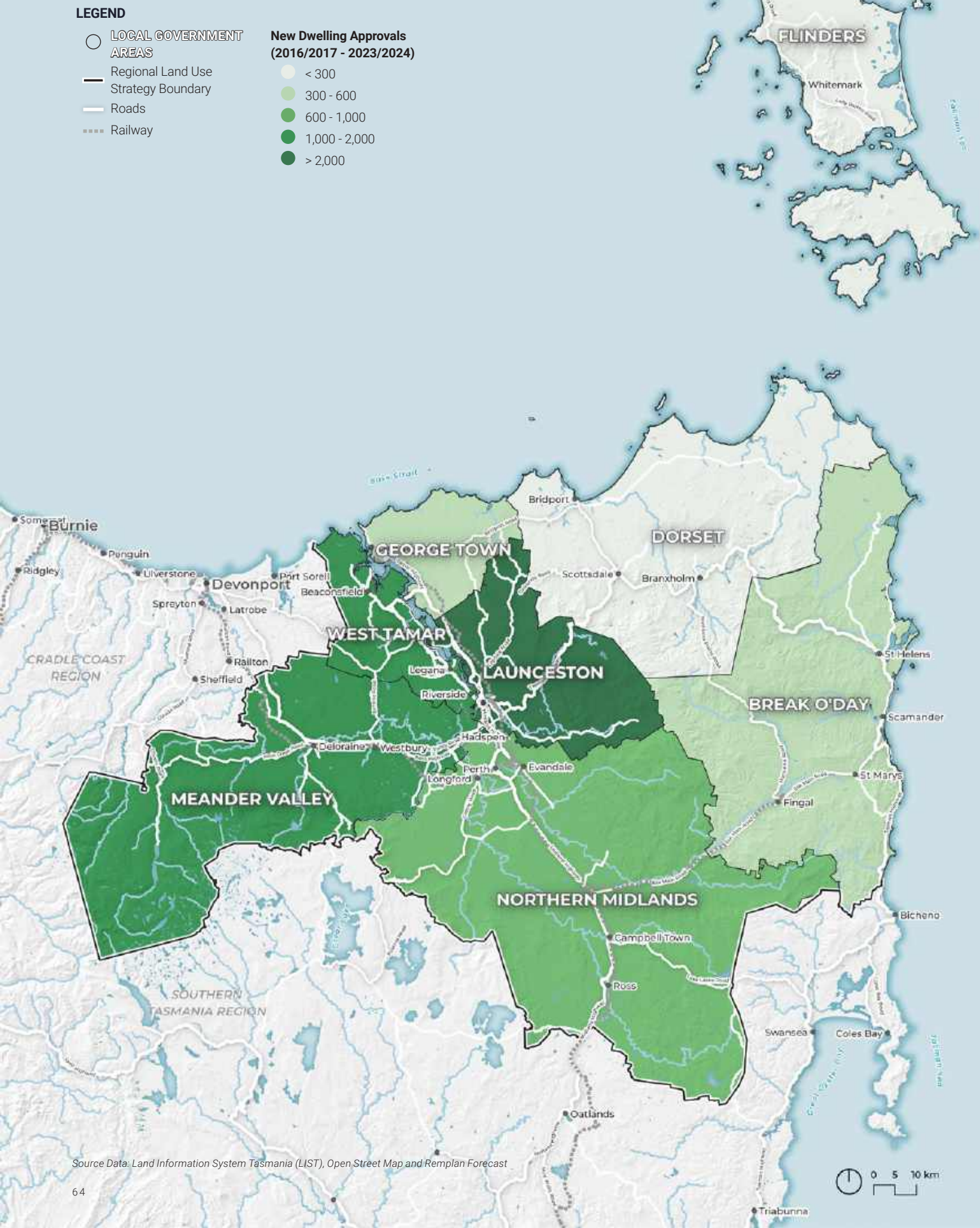
The different needs of these communities for social infrastructure and employment opportunities creates challenges for managing growth and ensuring access to services and facilities. Many cities and regions face the challenge of aligning infrastructure and service provision with population growth and change. This becomes particularly acute in cases where growth patterns result in the dispersion of the population over a wide area. Continued patterns of suburbanisation and sprawl in Northern Tasmania have resulted in a heightened need to extend and upgrade existing roads, water, sewer, electricity, and other essential services, and reinforced the reality of car dependence to access jobs, schools and services. A greater focus on infill, consolidation and renewal would assist in reducing car dependence and better targeting investment in infrastructure and services.

These issues are particularly noticeable in more isolated parts of the Region including the Furneaux Islands and parts of the north east. In addition to isolation, local populations and the resulting markets are small even by Tasmanian standards, leading to increasing construction costs, limited construction workforce and less cost-effective delivery of infrastructure. Regional land use planning in these areas should be informed by these challenges and locally specific strategies to address them.

Region	House	Other	Total New Dwellings	LGA Share of New Dwelling Approvals in Northern Tasmania (%)	LGA Share of Population (2023)
Launceston	1,834	192	2,026	33.4%	46.2%
West Tamar	1,129	18	1,147	18.9%	16.7%
Meander Valley	973	112	1,085	17.9%	13.7%
Northern Midlands	669	27	696	11.5%	9.1%
Break O'Day	400	0	400	6.6%	4.5%
George Town	336	15	351	5.8%	4.7%
Dorset	293	0	293	4.8%	4.5%
Flinders	58	16	74	1.2%	0.6%
Northern Tasmania	5,692	380	6,072	100.0%	100%

Table 3. New Dwelling Approvals in Northern Tasmania from FY2016/17 to FY 2023/24
Source: ABS (2021)

Figure 6. Northern Tasmania LGAs New Dwelling Approvals Types and sizes of housing SEQ



Approximately 86% of the existing housing stock in Northern Tasmania is separate houses and 12.3% are townhouses⁴⁵. The mix of housing types has remained largely unchanged in recent years. Approximately 94% of new dwelling approvals in Northern Tasmania between FY2016/17 and 2023/24 were single dwelling houses. There is a limited variety of dwelling types and sizes to meet current and evolving housing needs.

Houses are generally larger than required for the number of occupants, with an average of 2.39 persons per household across the Region and 45.7% of dwellings in Northern Tasmania being occupied by 1 or 2 people⁴⁶, despite the substantial majority of housing stock being larger, separate houses.

Average Household Size	Average persons per dwelling (2023)
Northern Tasmania	2.39
Break O'Day	2.07
Dorset	2.32
Flinders (Tas.)	1.93
George Town	2.32
Launceston	2.39
Meander Valley	2.41
Northern Midlands	2.39
West Tamar	2.50

Table 4. Average Household Size
Source: Remplan Forecast

This has resulted in housing stock that is increasingly underutilised with 'spare' capacity in many dwellings for more occupants. New housing construction is also predominately occurring in the form of low density and large lot subdivisions, in fringe urban areas and some rural living areas, which do not align with the type and size of housing that current and future residents will need. There is very little activity in urban or infill renewal development in central Launceston or other established towns across the Region. This is in part due to planning controls that restrict or make the approval of these developments more difficult, but is also a product of competition from greenfield growth which is not accurately accounted for.

The pattern of an ageing population, along with continued decreases in household size generally, will create the need for smaller and more varied housing, located near employment opportunities, services, and facilities.

Housing affordability

Housing affordability is an issue for Northern Tasmania, driven by population growth, a lag in delivery of new housing and limited housing diversity. Like many other regions in Tasmania, Northern Tasmania is grappling with the effects of a recent surge in population and residential demand that has significantly increased housing prices and affordability.

Migration has contributed to increased demand, price rises through increased financial capacity of new residents, and greater competition for housing. Furthermore, recent historically low interest rates, along with a range of housing subsidies (such as the Tasmanian First Home Owner Grant), have also played a part in driving up prices and intensifying competition. Tasmanians are increasingly having to compete for affordable housing to purchase and rent, and rates of home ownership are declining. The housing challenges in Northern Tasmania are becoming more severe due to the cost-of-living crisis, which is driven by inflationary pressures, slow wage growth and recent increases in interest rates. This has led to a decrease in the borrowing ability of first-time home buyers and an increase in the rates of rental and mortgage stress.

Housing stress is defined as more than 30% of household income spent on mortgage or rental payments. Within Northern Tasmania, this has a substantial impact on renters, with approximately one third experiencing housing stress, compared to approximately 10% of mortgage holders. More than a quarter of households are renters and the proportion of renters is increasing, meaning rental affordability is a significant and growing challenge. Rising inflation and interest rates also place additional strain on household finances. For residents, decisions about where to live are often driven first by housing affordability and availability, and this can lead to trade-offs against the need to travel for work, education or to access social services and entertainment. While the up-front costs of housing in more remote locations may be comparatively lower (or perceived as better value for money) the hidden costs of things like transport to access education, work and services are less of a consideration but may contribute over time to higher costs of living or lower quality of life.

Housing affordability is further impacted by limited housing availability, variability in demand, and relatively small markets which limit capacity to construct more housing and offer more diverse housing. More remote coastal locations and the Furneaux Islands in particular experience competing and often highly variable demands for housing due to permanent residents being out-priced by seasonal visitors and fluctuating seasonal workforce requirements.

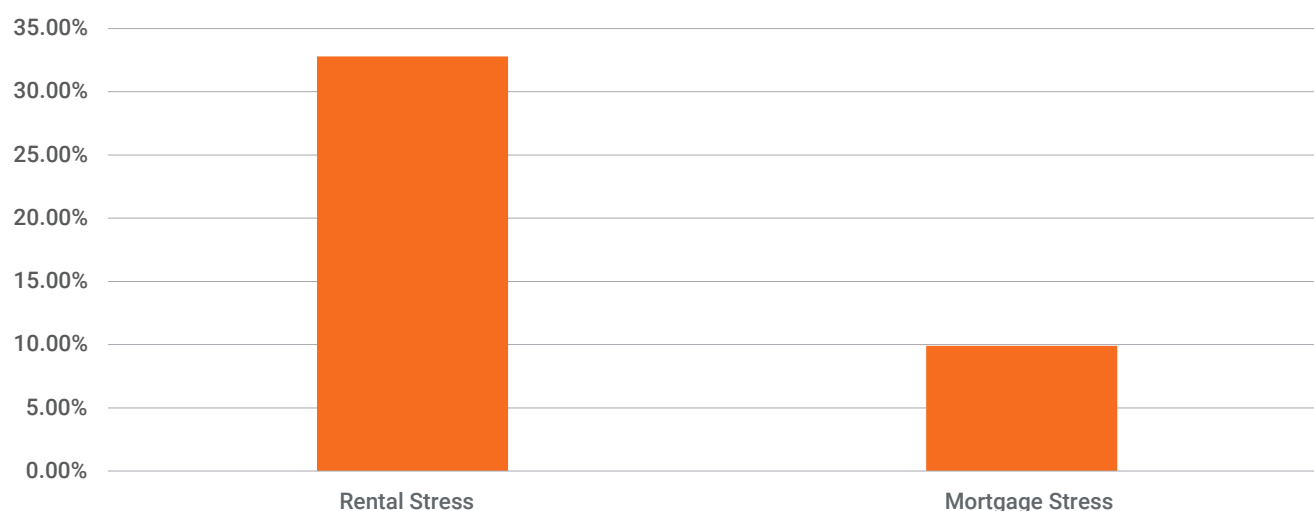


Figure 7. Northern Tasmania – Rates of Housing Stress
Source: ABS Census of Population and Housing 2021

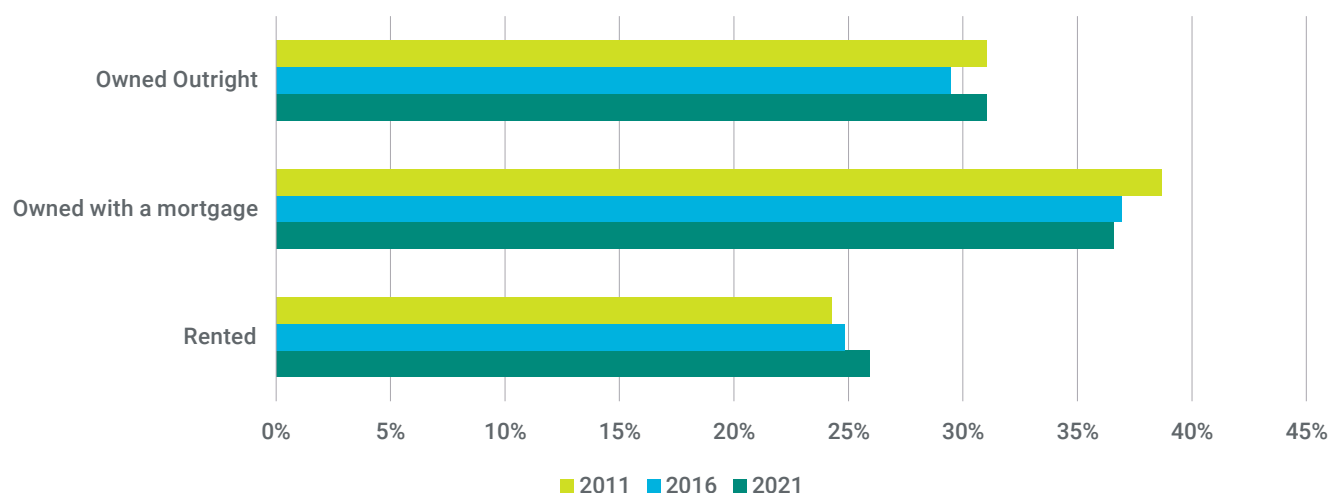


Figure 8. Northern Tasmania – Changes in Dwelling Tenure
Source: Remplan Community, Based on ABS Census 2021
Note: Excludes 'other' tenure types

Placemaking for Northern Tasmania

'Placemaking' describes the process by which spatial, economic, social and cultural levers can be pulled to create vibrancy of place; be it a city, town, village or particular area within an urban context. Placemaking is related to decisions about how growth will be managed across Northern Tasmania.

Different approaches to how the metropolitan area of greater Launceston grows, and how other townships across the Region respond to this growth, will impact on the potential to create enhance and sustain places that are vibrant, attractive and prosperous.

Northern Tasmania has an array of vibrant hubs and towns, spanning the major regional centre of Launceston which hosts year-round events and civic activity, through to small townships which, despite their smaller size, have unique identities that draw local and national and international visitors. These attractive features include economic or employment opportunities, the natural environment, history and heritage, or cultural, recreational and entertainment attractions. For many of these towns, opportunities to retain, uplift and in instances, diversify these unique identities and characteristics will be central to the ongoing success of these towns and villages.

For residents, decisions about where to live are often driven first by housing affordability and availability, and this can lead to trade-offs against the need to travel for work, education or to access social services and entertainment.

Growth in Greater Launceston

The current 2011 NTRLUS outlines challenges presented with the existing settlement pattern of the Region, being dispersed and characterised by relatively low residential densities, at approximately 10 dwellings per hectare.

To address these challenges the 2011 NTRLUS seeks to establish a regionally sustainable urban settlement pattern, outlining growth capacity for 20 years through a spatial framework comprising three key Regional Land Use Categories:

- Urban Growth Areas
- Rural Areas
- Natural Environment Areas

Within Urban Growth Areas, land is classified according to whether it's established and developed urban settlement or areas intended for urban development:

- **Priority Consolidation Area** – land in established urban areas focused on the Launceston Central Area, which supports a range of urban uses and development to provide improved access, services, amenity and liveability.
- **Supporting Consolidation Area** – comprising land in established suburbs which is separate from Priority Consolidation Areas and supports reliable and effective transportation, physically connects new urban settlements to existing communities and supports a wide range of services and facilities through access to existing or planned activity centres.
- **Growth Corridor** – comprising land contiguous with existing urban areas, including greenfield land, which will be developed to accommodate projected population growth where the land is determined to be suitable for urban development.

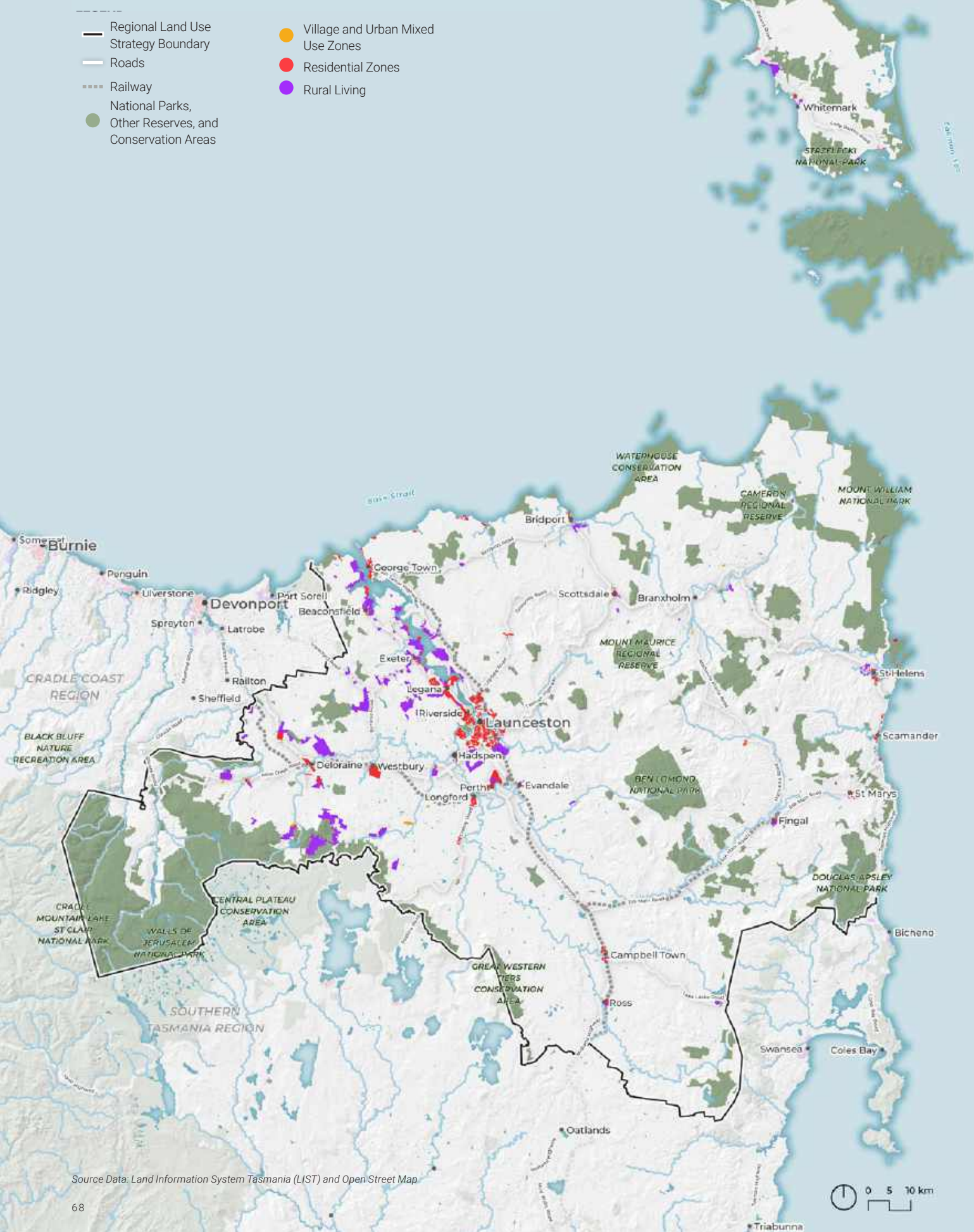
- **Future Investigation Area** – including Employment, Residential or Strategic Reserve Investigation Areas, identified in the Greater Launceston Plan to facilitate assessment of their potential for future urban development which will consolidate the Greater Launceston Area. These areas are considered by the existing NTRLUS to be inside an Urban Growth Area and can be rezoned for urban development, with an expectation that a local strategy for each spatial area will be produced prior to any applications for rezoning to urban uses.

The existing NTRLUS also sets a series of settlement pattern strategies which seek to promote the containment of settlements within identified Urban Growth Areas. There is a focus on consolidating and developing the Greater Launceston Area and sub-regional centres, through identification of infill opportunities within existing settlements and urban centres, and around activity centres and key public transport nodes and networks. The existing NTRLUS also sets intended density targets across the Northern Tasmanian Regional Activity Centre Hierarchy as follows:

Activity Centre Hierarchy	Locations	Infill Density target
Principal Activity Centre	Launceston CAD includes CBD and inner core frame areas	25+ dwellings per hectare
Major Activity Centre	Mowbray and Kings Meadows	
Suburban Activity Centre	Prospect, Legana, Prospect Vale, Newstead, Ravenswood and Riverside	Up to 25 dwellings per hectare
District Service Centre	George Town, Longford, Scottsdale, St Helens, Deloraine, Campbell Town and Exeter	
Neighbourhood or Town Centre	Lilydale, St Leonards, Perth, Newnham, Beaconsfield, Evandale, Norwood, St Marys, Youngtown, Bridport, Trevallyn, Westbury, Waverley, Windsor and West Launceston	N/A. Some residential adjoining in centre/ town residential development offering a greater mix of housing types and densities than outer lying residential areas.
Land or Minor Centre	N/A	N/A. May include residential land uses, however interspersed.
Specialist Centre	Launceston Airport / TRANSlink, UTAS City Campus	N/A. May include specialised accommodation relating to centre's focus (i.e. student accommodation).

Table 5. Existing NTRLUS - Northern Tasmanian Regional Activity Centre Hierarchy

Figure 9. Housing, Placemaking & Growth Management



The 2014 Greater Launceston Plan has also adopted a minimum target density in excess of 15 dwellings per hectare for infill development in urban consolidation areas, and a minimum target density of 15 dwellings per hectare for greenfield developments within the growth corridors. In addition, the plan outlines a strategic objective of achieving an approximate balance in future housing development of approximately 44 percent infill development in Priority Consolidation Areas focused on the Launceston Central Area and serviced by principal public transport routes, and approximately 56 percent greenfield development, focussed on identified growth corridors. The Greater Launceston Plan also outlines that the majority of greenfield growth (in excess of 75 percent) will be met in three key growth corridors, being:

- **St Leonards - Waverley corridor, City of Launceston:** extending south-east along the northern edge of the North Esk river valley, including planned residential areas of Waverley and St Leonards
- **South-West corridor, Meander Valley Council:** extending north and west from Prospect Vale to include the localities of Blackstone Heights and Travellers Rest and the planned community of Hadspen
- **Riverside - Legana corridor, West Tamar Council:** extending north from Riverside to include the Legana district and the adjoining Grindelwald and Rosevears areas.

Growth in Towns and Villages

The towns and villages of Northern Tasmania are deeply rooted in history, many with strong ties to early agriculture, forestry, fisheries, and other resource-based industries. Larger towns function as sub-regional hubs, offering administrative, retail, and commercial services, especially in areas where access to major urban centres is limited. Smaller villages serve local populations, with mixed-use centres providing essential daily services. Each town and village have unique characteristics that shape their identity and sense of place, making them important to protect and enhance. Additionally, towns like Scottsdale and St Helens act as vital service hubs, supporting surrounding remote communities with essential facilities and infrastructure.

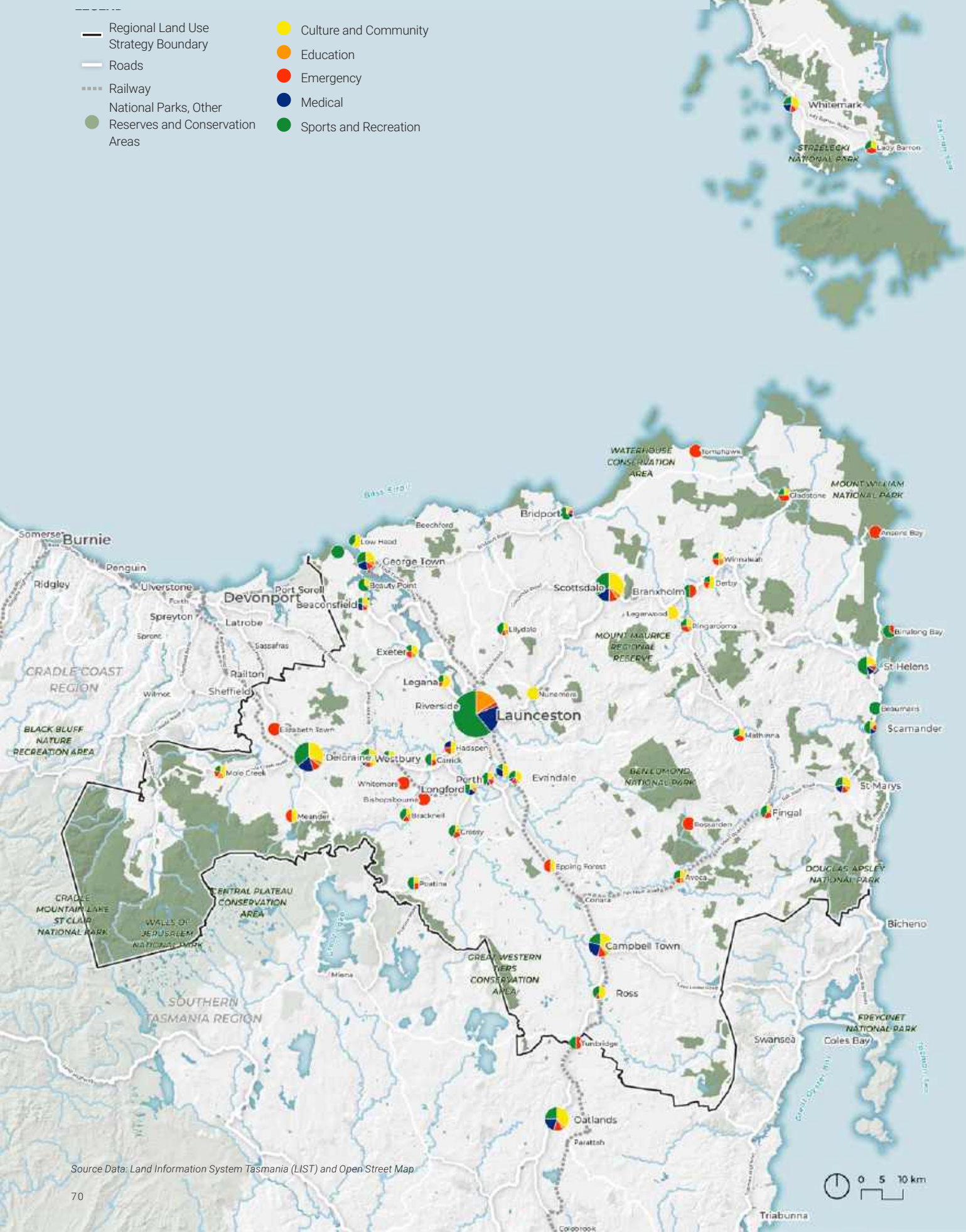
Population growth in Northern Tasmania's towns and villages is influenced by a variety of factors, including the Region's natural amenities and lifestyle offerings. Coastal areas are attracting retirees and young families from other states and major urban centres in Tasmania, leading to increased long-term resident populations. Simultaneously, tourist visitation, especially through short-stay holiday rentals, has intensified in these locations. However, these patterns bring challenges, such as ensuring adequate services for ageing populations in remote areas, particularly in aged care and healthcare. Effective planning is essential to address these demographic shifts while maintaining community vitality.

Economic diversification is crucial to the sustainability and growth of towns and villages in Northern Tasmania. Many traditional industries are transitioning to tourism or incorporating advancements such as irrigation-based agriculture and renewable energy. Tourism is particularly significant, with destinations like the Blue Derby Mountain Bike Trails and scenic coastal towns like Bridport and St. Helens, which attract both domestic and international visitors. However, the shift toward tourism-driven economies has placed pressure on housing availability, as permanent dwellings are increasingly converted to short-term accommodations, affecting the affordability for local residents.

The growing and changing populations of towns and villages require responsive infrastructure and services. Rural and coastal growth areas face challenges related to ageing populations, requiring upgrades to health and community facilities to maintain a good quality of life. Many rural living areas also lack adequate urban infrastructure, such as water supply and sewer systems, relying instead on self-contained services like on-site wastewater systems. Without careful management this can harm environmental values such as water quality. Seasonal population fluctuations from tourism impose further stress on existing infrastructure, underscoring the need for investment in both social and physical infrastructure.

Sustainable development is essential for the long-term viability of Northern Tasmania's towns and villages. Growth should be directed toward existing settlement areas to maximise the use of established utilities and infrastructure, while avoiding linear development along coastlines to preserve environmental and community values. Supporting neighbourhood and rural town centres is essential for strengthening local communities and encouraging population stability. Careful planning is also needed to manage economic growth, environmental conservation, and the diverse needs of residents and visitors alike, ensuring a sustainable future for the Region.

Figure 10. Northern Tasmania Region Social Infrastructure Overview



3.1.4 Social Infrastructure

Social infrastructure includes places and spaces that allow people to come together, support community life and celebrate and experience culture. This includes access to schools, TAFE and universities, hospitals, community health centres and medical centres, outdoor and indoor sport and recreation facilities like aquatic centres, sports courts and sports fields, parks and playgrounds, community centres, libraries, community arts and creative centres, museums, galleries and performing arts centres.

In Northern Tasmania, social infrastructure is highly concentrated in Launceston with major facilities such as UTAS Inveresk campus, Queen Victoria Museum/ Art Gallery, Launceston General Hospital, Australian Maritime College and TasTAFE. Existing provision of social infrastructure across the Region is also primarily isolated to the core townships including Launceston, Scottsdale, Deloraine and Campbell Town, which play an important role in the provision of services to residents of these towns, in addition to surrounding townships, including within rural and remote locations.

Population growth will put pressure on existing social infrastructure. However, it is important to recognise that communities are diverse, and needs will be different across the Region depending on the social, economic and environmental context. The community fabric of different areas has also changed, with lower proportions of school aged children, the loss of young people and skilled workers, and an ageing population. This leads to challenges like under-utilisation of existing infrastructure and facilities, where to plan for and provide schools and the availability of community spaces and health services to support older people and ageing-in-place. Maximising the use of existing well-located social infrastructure may also require the re-use or shared-use of existing facilities, to cost-effectively meet the changing needs of the community. Governance and ownership of assets are challenges for coordinated planning and delivery, and for shared use of existing facilities.

The forecast growth of towns and coastal villages will necessitate upgrades to existing as well as the delivery of new social infrastructure and services. Opportunities may exist to make better use of existing social infrastructure in these growing areas, facilitating the co-location of suitable and compatible social infrastructure. Growth will be more cost efficient if new housing is placed in locations that have good access to under-utilised social infrastructure and services. Comparatively, continuing to deliver new housing in isolated, greenfield areas on the fringe with minimal infill development in established areas is likely to create demand for governments to deliver new social infrastructure (at potentially great cost) while existing facilities operate below capacity or cannot be sustained.

Figure 10 maps the distribution of different types of social infrastructure, with larger circles indicating more social services and the colours representing the range of available services in each location. This illustrates the Region's heavy reliance on Launceston to access high-order community facilities and services. This means outer suburban areas within greater Launceston have ageing social infrastructure which is already at capacity. With forecasted growth in these areas (for example Perth which is forecasted population growth from 3,000 to 6,000 people) there is pressure on areas to upgrade existing and deliver new social infrastructure. This presents a gap in both the current regional network of social infrastructure and on newer suburbs/broad-hectare developments. In addition to new suburban growth areas, there is also relatively poor provision of social infrastructure and community services in coastal settlements, like Greens Beach and Bridport, which have experienced growth in permanent residents in a historically "*shack-style*" town that has until recently had relatively few permanent residents.

Many localities within Northern Tasmania are facing challenges of an ageing population, therefore the provision of community services, particularly health services, is a key focus for many towns. Whilst responding to the challenges of an ageing population remains important, it should not come at the expense of social infrastructure that is responsive to the needs of youth, including public open space, playgrounds and other local cultural spaces. Collectively, these spaces are vital for all community members and assist with attracting retaining younger people.

3.1.5 Theme 1: Opportunities and Challenges

Opportunities

- Relatively affordable housing combined with lifestyle and amenities, largely related to the natural environment, are key attractors for young people and families to the Region.
- Deliver more affordable housing for local people in the Region by supporting models that provide sustainable and suitable homes for people in towns and villages that could benefit from the economic uplift of a stable or growing population.
- Promote and support healthy, active outdoor lifestyles that attract and retain younger people to the Region.
- More equitable access to employment, education, health, and community services across the Region would assist to attract and retain people of working age support family retention and drives population growth.
- Regular monitoring of demographic trends to better inform adaptable and responsive growth strategies for the Region.
- Launceston's growing international student population is a potential avenue to grow the proportion of younger more qualified residents.
- Enabling and encouraging more diverse housing types, such as townhouses, apartments, and multi-dwelling options, so that housing better meets existing and projected needs of a changing population.
- Better coordination and masterplanning of greenfield developments to support varied housing options, more efficient use of land and better environmental and community outcomes.
- Leveraging population growth within the Region's existing urban areas and towns where the majority of social and physical infrastructure and services are located to enable more equitable, cost-effective and efficient growth.
- More compact and sustainable urban growth to diversify housing options, improve local access to jobs and services, and reduce car dependency.
- Encouraging compact, diverse housing within existing towns and villages can contribute to more vibrant centres and active main streets.
- The planning system enabling and incentivising more diverse and compact housing so that new housing is appropriate to the needs of an older population and smaller households.
- Co-locating community facilities and using existing cultural and community buildings can stimulate local creative industries, foster innovation, and enhance access to services, particularly in rural, coastal, and remote areas.
- Expanding and improving mental health and disability support services.

Challenges

- Affordability of housing is increasingly a challenge particularly for people on lower incomes.
- Broader issues, such as federal policies, high construction costs, and financing difficulties, constraining housing delivery and sustainable growth in the Region.
- Planning for fluctuations in the rate of population growth over the long term that are largely outside the control of governments but make planning for infrastructure and services challenging.
- Ageing populations, the departure of working-age professionals, and the loss of younger, skilled people to other regions or interstate are affecting community sustainability. Supporting ageing-in-place, and attracting and retaining a younger workforce, are important to sustainable population structures and access to services like health care and education.
- Rising housing demand in coastal areas, driven by lifestyle preferences and short-stay accommodation, increases pressures on housing affordability and availability.
- Opportunities for economic development and the delivery of human services (that rely on attracting qualified workers) are constrained by a tight housing market and lack of appropriate housing choices, particularly in locations with a strong tourist industry.
- Achieving the right balance between infill and greenfield residential development, and maximising the use of existing physical and social infrastructure.
- The historic dominance of low density housing combined with smaller households and an ageing population have led to underutilised housing stock.
- Statutory planning provisions (in the Tasmanian Planning Scheme) make the delivery of more compact and diverse housing difficult.
- More realistic assessments of the capacity of zoned land to accommodate housing, including consideration of environmental constraints to development of zoned land, use of 'vacant' land for holiday accommodation, and whether available land is suitable to accommodate the types of housing needed by the community in the right locations.
- Understanding the direct and indirect impacts of climate change across the region and its communities using indicators of social wellbeing, population and settlement patterns, housing supply and quality, and place making.
- Inconsistencies in heritage protection across council areas, with stronger recognition in Launceston and Northern Midlands compared to other areas.
- Adaptive reuse of heritage places is limited by legislation and planning controls.
- Aboriginal cultural heritage is under-represented and can be difficult to incorporate into planning processes. Ongoing collaboration with the Aboriginal community is needed to understand key needs and aspirations of Aboriginal people, and enabling Aboriginal people to care for their own communities and Country.





THEME 2

Climate, Landscape, Environmental Values, Natural Hazards & Environmental Risks

3.2 Theme 2: Climate, Landscape, Environmental Values, Natural Hazards & Environmental Risks

3.2.1 Natural Environment, Landscape Character and Climate

Landscape Character

The Northern Tasmania Region is defined by its expansive network of green and blue infrastructure, environmental assets and landscapes which is bounded by wilderness and the coast. The Region's landscape is characterised by undulating rural hinterland and green inland areas located in valleys and along river channels overlooked by mountainous eucalypt forests and escarpments.

The city of Launceston and many of the Region's urban areas are concentrated along the River Tamar, a tidal estuary stretching from Launceston to the Bass Strait.

The landscape along the northern and eastern coastline is varied and rugged, featuring stretches of rocky shorelines, exposed headlands, sheltered beach coves and sandy bays. Mountain ranges (particularly the Great Western Tiers), steep ridgelines and karst landforms (like Mole Creek) are prominent features across much of the Region, and provide a high level of scenic amenity and settings for outdoor recreation. Flinders also has dramatic and varied landscapes, from granite cliffs to rolling green farmland through the northern area of Flinders Island.

The Tasmanian Wilderness, a UNESCO-heritage listed area, frames a significant proportion of the south-western fringe of the Region (1,354km²). National parks, regional reserves and conservation areas are located across the Region. A significant expanse of this Region is densely forested and classified as threatened, endangered and priority vegetation.

These landscape features shape the lifestyle and movement of people across the Region, and serve as a major attraction for visitors and migrants. The Region's wilderness and wildlife are a significant driver for inter-state and international visitation. Nearly half of all tourists who visit Tasmania cite the natural environment as their primary reason for visiting the Region⁴⁷. The Region's economy is also heavily supported by the natural environment, with many agricultural industries and aquaculture producers depending on natural assets and resources. Additionally, towns like Derby have harnessed the natural landscape to transform the former tin-mining

town into an internationally recognised mountain-biking hub, creating economic success based on a combination of nature and recreation based tourism and adaptive re-use of redundant mining operations.

Natural Heritage

National Parks and other reserves

Figure 11 highlights the National Parks and other reserves of Northern Tasmania. The southern and western fringes of the Region are entirely National Parks and Conservation Areas including the Cradle Mountain – Lake St Clair National Park and Great Western Tiers Conservation Area, which form part of the UNESCO-heritage listed Tasmanian Wilderness World Heritage Area. Other National Parks are dispersed across the north-east and east of the Region. These national parks tend to follow the mountainous areas, such as the Ben Lomond National Park which is home to Tasmania's second highest peak and a striking glacial landscape. Other significant waterways and coastlines across the Region including the edges of coastal townships in Dorset, Break O'Day and Flinders encompass coastal conservation areas including the Waterhouse Conservation Area and Bay of Fires Conservation Area.

The extent and diversity of protected natural areas and landscapes contribute to the Northern Region's highly valued landscape character and the regional economy through ecological services and nature and recreation-based tourism. These provide employment opportunities often in more remote parts of the Region where job opportunities are limited and traditional industries may be transitioning or declining. The recreational and scenic landscape opportunities are highly valued by both residents and tourists.

Scenic and Landscape Protection Areas

In addition to formal conservation reserves, the Tasmanian Planning Scheme includes land use planning mechanisms to protect landscape and scenic values across the Region.

Different councils apply these controls to their area to reflect local conditions. **Figure 11** includes Scenic Protection Areas and Landscape Conservation Zones that apply under planning schemes.

Waterways and Wetlands

The Northern Region encompasses some of the State's most significant river and waterway catchments, focussed on the South Esk River and River Tamar catchments which are the major river and estuarine systems in the Northern Region.

Flowing north-east through towns and farmland, the South Esk River is the longest river in Tasmania. It rises near the Upper Esk in the north east, and joins the mouth of Kanamaluka/River Tamar at Launceston before entering the Bass Strait at George Town, covering a distance of over 250km. The South Esk River catchment, includes the South Esk River, Tinamirakuna / Macquarie River, the Break O'Day River, the Nile River, and the St Pauls River, along with their tributaries.

The South Esk River Catchment is an important source of water for farming, drinking water and hydro-electricity generation (i.e. Trevallyn hydroelectric Power station adjacent to the River Tamar north of Launceston). The River Tamar estuary, at nearly 70km long, has an important influence on the Region, contributing significantly to port activity, linking Launceston with the port at Bell Bay near George Town, and shaping the character of many towns including Launceston, Riverside, Legana, Beauty Point, Exeter and George Town. The River Tamar also includes a series of unique wetland ecosystem comprising mudflats, lagoons and islands filled with plant and animal life.

The northern (Bass Strait) and eastern (Tasman Sea) coastlines also features broad intertidal flats, saltmarshes and other smaller watercourses including inlets and estuaries. The Ringarooma River system is a key waterway within Northern Tasmania, flowing from a watershed below Mount Maurice to the Tasman Sea of the South Pacific Ocean. Located at the far north-east coast of Tasmania, between Cape Portland and Waterhouse Point, the Floodplain Lower Ringarooma River is a Ramsar site containing a complex wetland, coastal and estuarine ecosystem providing habitat for nationally threatened species.

The Meander River catchment is a natural area of land that drains water into the Meander River. The catchment includes the Great Western Tiers and the towns of Meander and Deloraine.

The land between Tasmania's Great Western Tiers and the East Coast Range represents one of Australia's 15 national biodiversity hotspots. The area is home to threatened animals including the Eastern Bettong and the Eastern Barred Bandicoot.

The Northern Slopes, Northern Midlands, Ben Lomond and Furneaux bioregions sit within the Northern Tasmania Region. Within these bioregions, there are several wetlands and waterways protected under the

Reserve Estate or listed under the Ramsar Convention on Wetlands.

Northern Tasmania's perennial rivers and vast quantity of water assets provides the Region a high level of water security for rural, urban, industrial and hydro-electricity uses.

Climate change

Tasmania's Northern Region experiences a temperate climate with moderate temperature ranges. Long-term average temperatures have increased by up to 0.15°C per decade since the 1950s. Rainfall distribution varies significantly across the Region, with coastal areas receiving more rainfall than inland areas. However, there has been a noticeable decline in average annual rainfall since the mid-1970s, particularly during autumn. The Region is expected to face more intense extreme weather events, posing risks to communities, infrastructure and the environment.

Very hot days could see temperature increases of up to 5°C, accompanied by longer heatwaves and an increased likelihood of bushfires. By the end of this century, average annual temperatures in the Region are expected to rise by around 3°C. The number of summer days exceeding 25°C will increase, and the hottest days of the year could be 3.5°C to 5.1°C warmer. Frost risk days are predicted to significantly decrease. Buildings, towns and cities will need to be designed to accommodate warmer temperatures, including more shade and better insulation.

Rainfall patterns are predicted to change. Short, intense rainfall events are projected to become more frequent, increasing the risk of flooding. Dry periods are also predicted to get longer and annual rainfall may drop by 9% to 14%. Evaporation rates are expected to rise by 23% to 24%, further stressing water resources for agriculture, human consumption and for fighting fires.

Coastal areas will face greater inundation risks. Current 100-year storm tide events may occur every five years by 2090. Communities, buildings and infrastructure on the coast may be at risk from inundation and this may require changes to land use patterns over time.

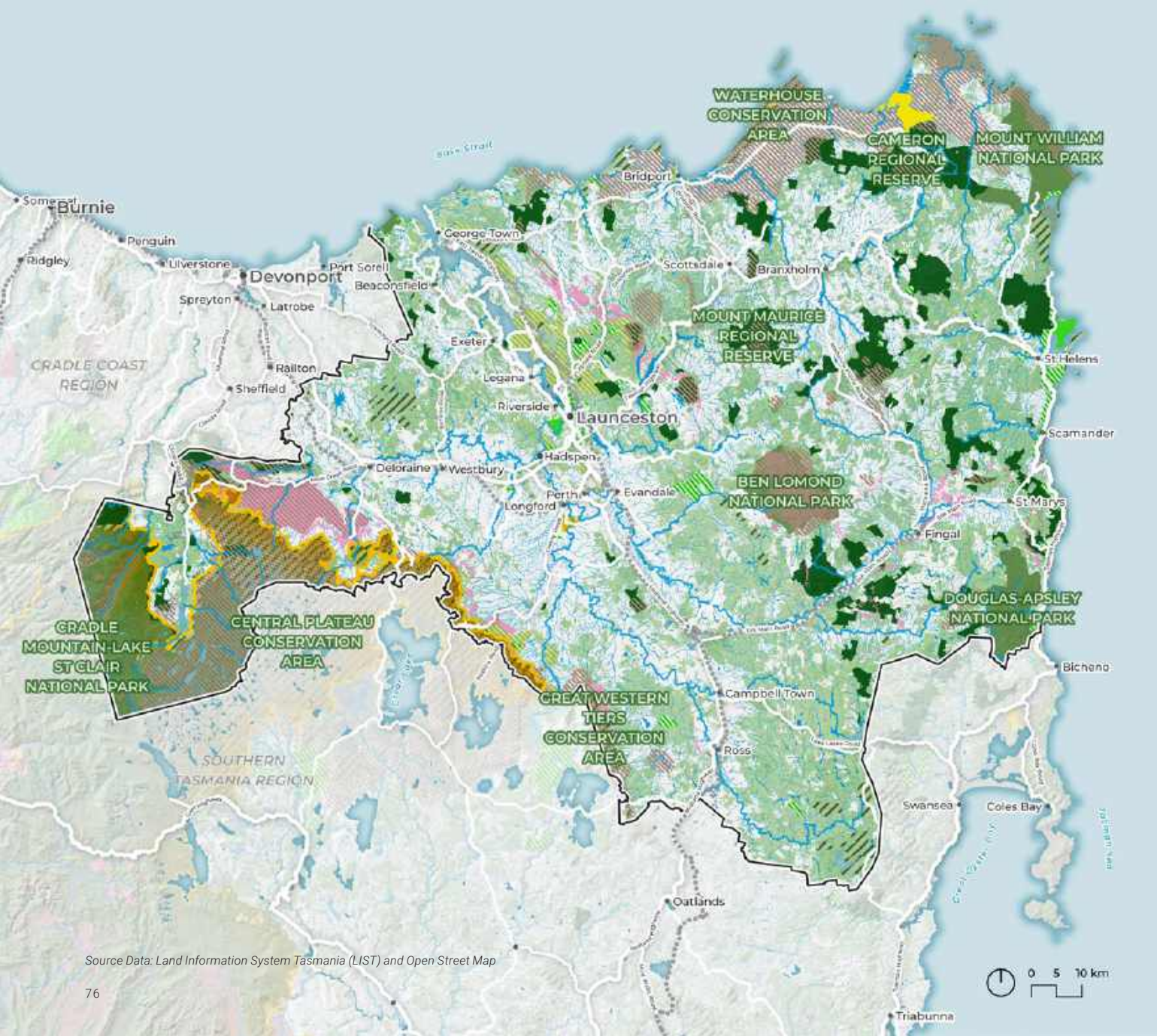
Fire risks will escalate, with the Forest Fire Danger Index projected to rise by 41% to 52%. Much of the Region is already under threat from bushfires, and closer consideration of settlement patterns, design of new developments and building construction standards will be required to address increased frequency and severity of bushfires.

To help the Region adapt to future climate change, the northeast councils engaged the University of Tasmania Climate Futures Tasmania to produce Individual Climate Profiles for each council area in the Region. Based on work led by the southern and northeast councils, they identified climate indices to support their decision-making processes for core roles of development planning, engineering and assets design and procurement (i.e. stormwater, roads and civil), emergency management, corporate services, environmental and public health services and facilities, community development and emergency management.

Figure 11. Natural Environment, Landscape Character and Climate

LEGEND

- Regional Land Use Strategy Boundary
- Roads
- Railway
- Waterways and Coastal Protection Areas
- National Parks
- Other Reserves
- Conservation Areas
- Open Space and Recreation
- Landscape Conservation Areas
- Scenic Protection Areas
- Threatened, Endangered and Priority Vegetation
- Tasmanian Wilderness World Heritage Area
- Ramsar Wetlands
- Geoconservation Sites
- CFEV Karst- Integrated Conservation Value



Source Data: Land Information System Tasmania (LIST) and Open Street Map

3.2.2 Natural Hazards & Environmental Risks

Natural hazards and environmental risks have implications for land use planning in Northern Tasmania, particularly given the Region's dispersed pattern of towns and urban areas, isolated residential areas, interfaces between natural and urban areas, and extensive coastline. The Region's strong agriculture and aquaculture sectors, nature based tourism, port activity and history of mining and forestry benefit from the Region's natural environment, but can also present threats to natural systems and environmental quality.

Land use planning is an important tool to assist in reducing the impacts of natural hazards and environmental risks by identifying:

- Where natural hazards are located and utilising mapping to see the highest risk areas.
- The areas where there is least risk from natural hazards to human life and therefore what types of development are best suited where (i.e. residential, industrial, commercial).
- Areas which may already be developed and have existing infrastructure and services to make the best use of already-developed land.
- How people and goods currently get around the Region and whether efficiencies can be achieved to reduce the distance and number of trips.
- Ecosystems that should be protected from land use impacts.
- Where the most ecologically and economically valuable water sources, ecosystems and flow regimes are that benefit natural systems and maintain agriculture and aquaculture productivity.
- Sensitive wetlands, riparian and coastal foreshore areas to be protected.

Natural Hazards

Northern Tasmania has historically been and will continue to be affected by natural hazards. Recent events of extreme flooding, bushfire, drought, biosecurity concerns and marine heatwaves have already resulted in environmental, economic and social impacts according to the Tasmanian Government⁴⁸. Climate change and its associated impacts, including sea level rise and an increase in extreme climate and weather activity, are already affecting Northern Tasmania. Increased intensity of east coast lows, increasing flooding and storm damage, changing rainfall patterns, and warmer temperatures are drying landscapes, increasing the intensity of bushfires and droughts, and impacting biodiversity.

Risks of inundation and riverine flooding in low-lying areas, landslide and accelerated coastal erosion are key concerns in Northern Tasmania, particularly as infrequent periods of heavy rainfall can occur.⁴⁹ In recent years, destructive flooding has impacted the Northern Region (2022), especially Launceston, Meander Valley, Northern Midlands and Break O'Day. Overtime, coastal areas along the north and east coast have been affected by accelerated coastal erosion following king tides and storm surges. Within Northern Tasmania, there is also an observed risk of historic flood protection infrastructure such as levees not providing sufficient protection for current and projected future flood events. Furthermore, a number of townships which rely on a single or small number of key road connections for access also presents a risk of isolation during flood events.

All of the Northern Region is classified as bushfire prone area and bushfires are becoming increasingly common. Significant bushfire events in recent history include the north-west bushfires (2016) and the 2018/19 bushfire season which impacted the broader state. Future bushfire seasons are likely to be longer, and fires more intense and destructive.

A significant proportion of the Northern Region is subject to landslip hazard and are identified as landslide affected areas due to the Region's steep topography across the hinterlands.

Based on the projected changes to Tasmania's climate by 2100, Northern Tasmania is likely to experience similar environmental changes that may translate into increased risk of natural disasters including:

- Increased coastal inundation and erosion of vulnerable coastal shorelines from more storm tide events and sea-level rises.
- Accelerated risk of river flooding and the impacts for surrounding inland residential and agricultural areas.
- Increased bushfire frequency and intensity.
- Periods of prolonged low rainfall reducing the storage levels for hydro-electricity generation, and increasing water demand from population growth and irrigation.
- Increased runoff in agricultural areas due to changes in rainfall and evapotranspiration.
- Increased risk of landslides as a result of extreme rainfall periods.
- Increased extreme weather events including more frequent, intense storm and flood events, increased coastal erosion, longer fire seasons, drought, and river flooding.
- 'Urban heat island' effects will continue to make developed urban areas warmer unless managed, increasing reliance on artificial cooling.

To keep people safe and protect the environment, land use planning the Region will need to continue to adapt to projected climate changes and the associated natural hazards. Evidence-based risk data such as up-to-date Tasmanian Strategic Flood Mapping, predicted sea level rise and coastal erosion mapping, bushfire and landslide prone areas will be a vital part of the land use planning toolkit to inform decisions and reduce risks. While much of this data now exists, there are some gaps in the level of detail (for example, more gradation in levels of hazard for bushfire prone areas) that if addressed would assist to make better informed land use planning decisions.

Environmental Risks

A range of economic activities are underpinned by the Region's unique natural environment and resources, particularly, agriculture, aquaculture, forestry and mining. The Northern Region's fertile soils support a range of agricultural activities including dairy and beef production, cropping, and significant horticulture. Rural land and agricultural land uses predominate across the Region, with the most fertile land situated in valleys.

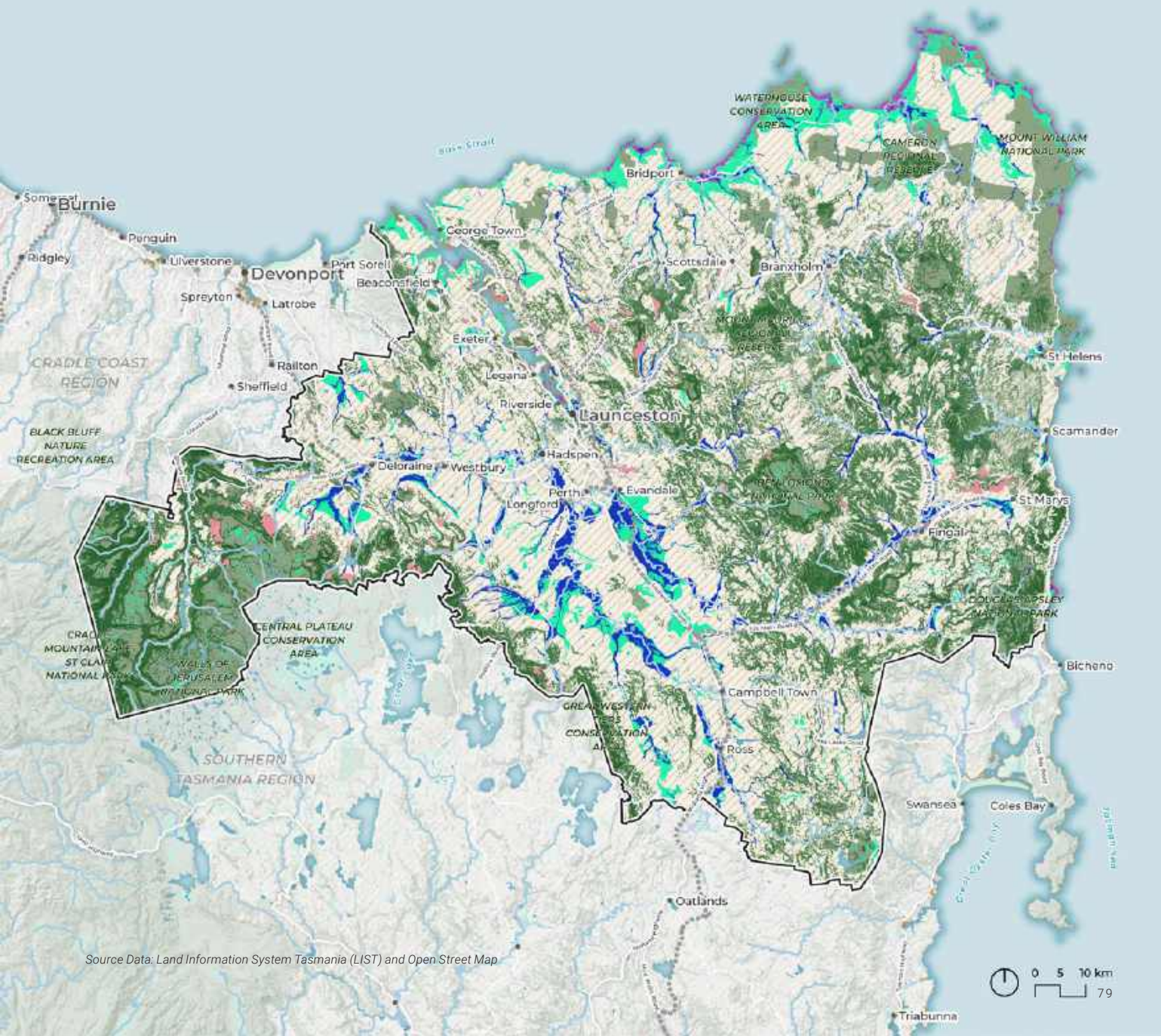
The following challenges arising from human impacts and interventions are likely to increase pressure on the natural systems of Northern Tasmania:

- Increased environmental pressure from the growing population, particularly the encroachment of larger lot subdivisions and development on agricultural land and conservation areas.
- Pressures from agriculture on the natural environment including changes to water tables and water quality, degradation of native vegetation and decline in biodiversity and soil structure.
- Legacy impacts of contamination from heavy industry including land and water pollution and ongoing air quality impacts.
- Land, water and air pollution from mining, light industrial production and port activity.
- Impacts on native forests, ecological diversity and connectivity from forestry operations.
- Impacts of growing viticulture and horticulture industries due to favourable climatic conditions, impacting settlement patterns, natural and water resource planning.
- Impacts linked to the introduction and spread of invasive species.
- Impacts from aquaculture on marine ecosystems and water quality.
- Changing sea-water temperatures creating conditions for invasive marine species and changing the growth and distribution of marine vegetation, with associated impacts on recreational and commercial fishing, and aquaculture.
- Loss of wildlife and their natural habitats through urban sprawl and greenfield development as the population continues to grow.

Figure 12. Natural Hazards & Environmental Risks

LEGEND

- Regional Land Use Strategy Boundary
- Roads
- Railway
- National Parks, Other Reserves and Conservation Areas
- Landslide Hazard
- Landslide Affected Areas
- 1% AEP CC Flooding
- Coastal Inundation
- Coastal Erosion
- Inland and Coastal Acid Sulphate Soils
- Bushfire Prone Areas



Source Data: Land Information System Tasmania (LIST) and Open Street Map

3.2.3 Theme 2: Opportunities and Challenges

Opportunities

- Celebrate, protect and promote the Region's natural landscapes and wildlife as significant drivers for inter-state and international visitation.
- Guide and enable innovation and adaptation to support the retention and growth of nature-based tourism and recreation land uses.
- Collaborate with Tasmania's research institutions (i.e. UTAS) and regional programs (i.e. NTARC, NEDRF, NRM Nth) to implement climate-first decision-making approaches to embed resilience in regional land-use planning.
- Implement climate risk assessments and adaptation plans, developed through NTARC, to manage changing natural hazards through land use planning.
- Prioritise and facilitate emissions and waste reduction and contribute to reducing land and water contamination through more sustainable and efficient planning for land use growth and change.
- Support innovations in agriculture and aquaculture that prioritise the protection and sustainable management of natural assets.
- Apply sustainable approaches to growth management across the Region to balance the need for more housing and changing housing needs of the community with the preservation of the Region's natural environment and its value to the community and economy.
- Utilise insights provided by the State GIS mapping database of natural hazards and values to inform sustainable and resilient land use patterns.

Challenges

- Enabling growth of urban areas, towns and villages while protecting the Region's highly valued natural environment.
- Planning responses to increased risk of inundation and riverine flooding, landslide and accelerated coastal erosion in existing low-lying urban areas and towns, including areas already developed and land that is zoned but not yet developed, or has potential for more intensive land use under current planning controls.
- Communicating climate change and natural hazard related risks to the community and stakeholders, where increased risk is predicted and constraints on the use of land have changed.
- Long term maintenance and resilience of transport networks impacted by natural hazard events and ensure regional land use considers potential access and evacuation matters.
- Ensure regional land use planning considers the increased frequency and intensity of potential natural disasters and new challenges (i.e. climate change migration) in a changing and more variable climate environment.
- Balancing conservation of the Region's natural assets and the viability and sustainability of industry, agriculture, aquaculture, and tourism.
- Planning to avoid identifying land for new development that is exposed to unacceptable bushfire risk, with predicted changes to bushfire frequency and intensity.
- Maintaining up-to-date spatial data on natural values and natural hazards, and providing clear direction on how to apply data and information to regional and local land use planning with limited resources and when risk assessments are changing due to climate change.
- Limited assessment of different risk levels for some natural hazards (for example, bushfire prone land) currently makes it difficult to determine areas suitable for different land uses.
- Improving the consistency of applying planning controls that protect the natural environment, and resourcing within local government to undertake necessary assessments to inform planning controls designed to protect the natural environment and manage natural hazards.



Flinders Island
Ethos Urban



THEME 3

Economic Activity & Infrastructure

3.3 Theme 3: Economic Activity and Infrastructure

3.3.1 Economic Activity and productivity

The Region's Economy

Northern Tasmania's economy contributed more than a quarter of Tasmania's Gross Regional Product (GRP) in 2024⁵⁰ and continues to contribute to the state's economic growth. It has a diverse economic base, with a blend of more established urban centres, semi-rural and rural areas, with variance in economic activities and employment across the Region.

The Region has a significant rural population base and has sustained traditional industries in Agriculture, Forestry and Fishing which still make strong regional economic contributions. As Launceston continues to grow, the economy has diversified, with an increasing focus on population and consumer serving industries, especially health care and social assistance. Across the Region, the largest employment and industry sectors include:

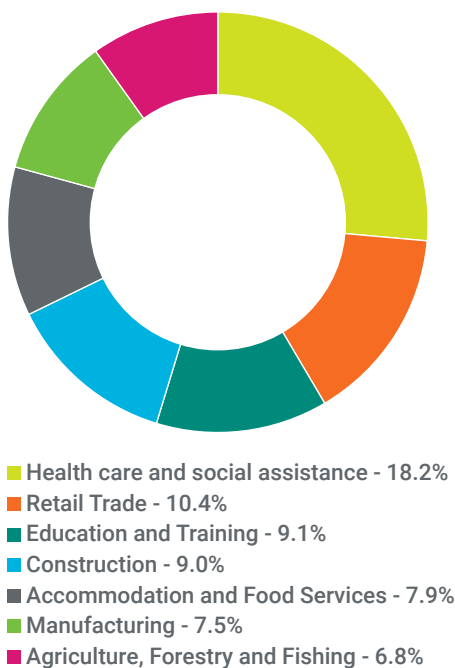


Figure 13. Northern Tasmania largest employment and industry sectors⁵⁸

Key industries and employment sectors vary across the Region, with higher concentrations of population-serving activities in Launceston and West Tamar, manufacturing and construction in George Town, Meander Valley, Northern Midlands and West Tamar, and the dominance of agriculture, fisheries and forestry industries in rural and coastal areas.

Northern Tasmania's economic performance is strongly influenced by its population patterns. Periods of economic growth typically align with periods of population growth and increasing consumer purchasing power. The Region's strong visitor economy is also growing and diversifying, with tourists increasingly attracted to the Region's unique environmental offerings, land and water-based recreational activities, gastronomy and viticulture.

In recent years, Tasmania's economy has performed well, underpinned by a major population and tourism 'boom' post COVID-19. The Northern Region's diverse economy assists to insulate it from cyclical downturns in specific sectors and provides a diversity of options for long term economic growth.

Education and qualification levels in Northern Tasmania are lower than the Tasmanian and wider Australian averages. Northern Tasmania faces a major economic challenge with an ageing population and the migration of young people to the mainland for work and education which reduces its skilled workforce. This makes it harder to sustain economic growth and attract high-value, innovative industries.

In summary, Northern Tasmania's main employment characteristics and opportunities are related to:

- Health care & social assistance, driven by the location of major facilities, like the Launceston General Hospital, within the Region, and the further investment and expansion of these facilities (e.g. implementation of Launceston General Hospital Precinct Masterplan).
- Growing employment opportunities in the health care and social assistance sectors in response to the Region's ageing population.

- Other key industries including education, public administration and retail are directly linked to serving the needs of the Region's community.
- Increasing growth in accommodation and food services, including food and viticulture based tourism within the Region, focussed on wineries, distilleries, lavender, dairy, beef and fishing, provides economic opportunities which also support synergies with traditional agriculture industries.
- Agriculture and food processing continue to be important within the regional economy. Further innovations in agricultural process and improved irrigation infrastructure, provide opportunities to add value, strength and diversity to agricultural produce and employment.
- Construction is also a major employer within Northern Tasmania, reflecting continued and sustained activity particularly in housing construction over recent years, despite supply pressures and constraints on materials.
- The Port of Bell Bay is a critical hub for Northern Tasmania's (and the whole state's) economy around supply chain and freight logistics. It facilitates opportunities for emerging industries (including renewable energy generation) alongside the consolidation of established operations within the forestry and mineral sectors.

Key economic figures:⁵¹



10.4 Billion
Gross Regional Product

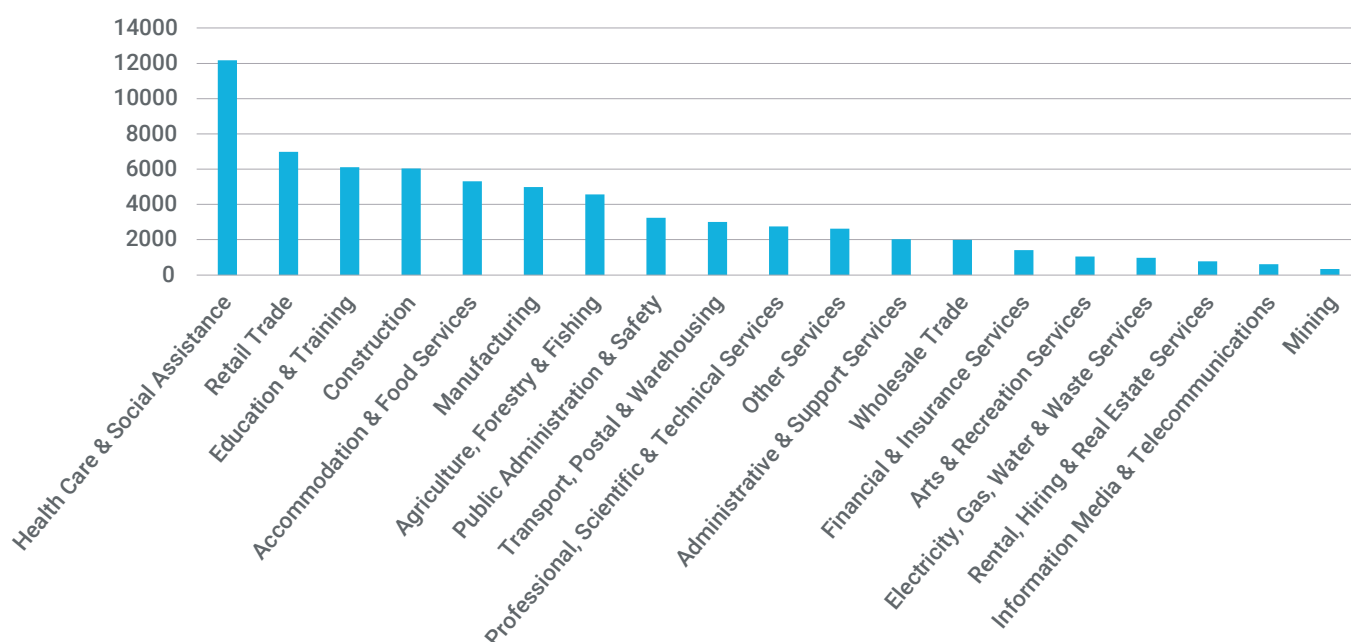


66,969 Workers
Workforce



Largest industry of Employment
Health care + Social assistance
18.2% of all jobs

Figure 14. Key industries of employment in Northern Tasmania
Source: Remplan Economy, based on ABS 2021 Census Place of Work Employment



Industrial Uses and Activity

Key industrial uses and associated activity is located across central and northern areas in the Region. Bell Bay and George Town support the state's largest heavy industrial precinct and light industrial activities. The Precinct comprises a diverse range of resource manufacturing including metal smelting, alloy production and forest processing facilities, and is responsible for 59% of all Tasmania's manufactured exports.⁵²

The emerging Launceston Airport TRANSLink precinct also presents a growing key industrial location within the Region. It provides freight and logistics services, taking advantage of its location adjacent to Launceston Airport and key transport corridors. A Feasibility study and business case are to be prepared to support the delivery of a Launceston Airport TRANSLink Facility.

Other smaller or specialised industry clusters are scattered throughout the Region, some with links to specific industries like forestry and timber milling (e.g. Branzholm), aquaculture (e.g. Launceston, Break O'Day, Dorset and Flinders), and agricultural production (e.g. many areas across Meander Valley, Flinders, Dorset and the Northern Midlands).

Agriculture, Mining, Forestry and Aquaculture

Primary production has historically been important to the Northern Region, facilitating employment opportunities across the rural and coastal areas with high quality agricultural land and aquaculture opportunities. Some of these historically important industries are declining or transitioning to different methods of production, particularly with forestry and aquaculture.

Agriculture, Forestry and Fishing is one of the dominant industry of employment in⁵³:



1,134 Jobs

Northern Midlands



1,056 Jobs

Meander Valley



734 Jobs

Dorset



117 Jobs

Flinders

Irrigation is a strong driver of agricultural production and the growth of fruit and vegetable crops, however can have significant impacts such as the occurrence of dryland salinity, water quality and aquaculture. Potato and lavender farms across Dorset and the vast berry farms at Hillwood in George Town and Christmas Hills in Meander Valley are dependent on irrigation and large-scale production for efficiency. Expansive vineyards (for example across Rosevears, Rowella, Pipers River and across much of West Tamar) have continued to expand across the north-eastern and southern parts of the Region. Some rural economies are diversifying through the growing emergence of agricultural value-add activities which are increasingly attracting tourists. The growth in agritourism is seeing the integration of industry sectors that were previously separate.

Whilst not as substantial as agriculture, aquaculture makes an important contribution to the regional economy with marine farming leases operating across different parts of the Region, including some inland areas (i.e. salmon ponds and hatcheries in Bridport and Springfield) and coastal areas (i.e. oyster farms in St Helens).

Tourism

Tourism is a significant contributor to the Region's economy. Tourists are primarily attracted to visit the Northern Region due to its unique environmental offerings, land and water-based recreational activities, historic cultural heritage, gastronomy and viticulture, arts and culture.

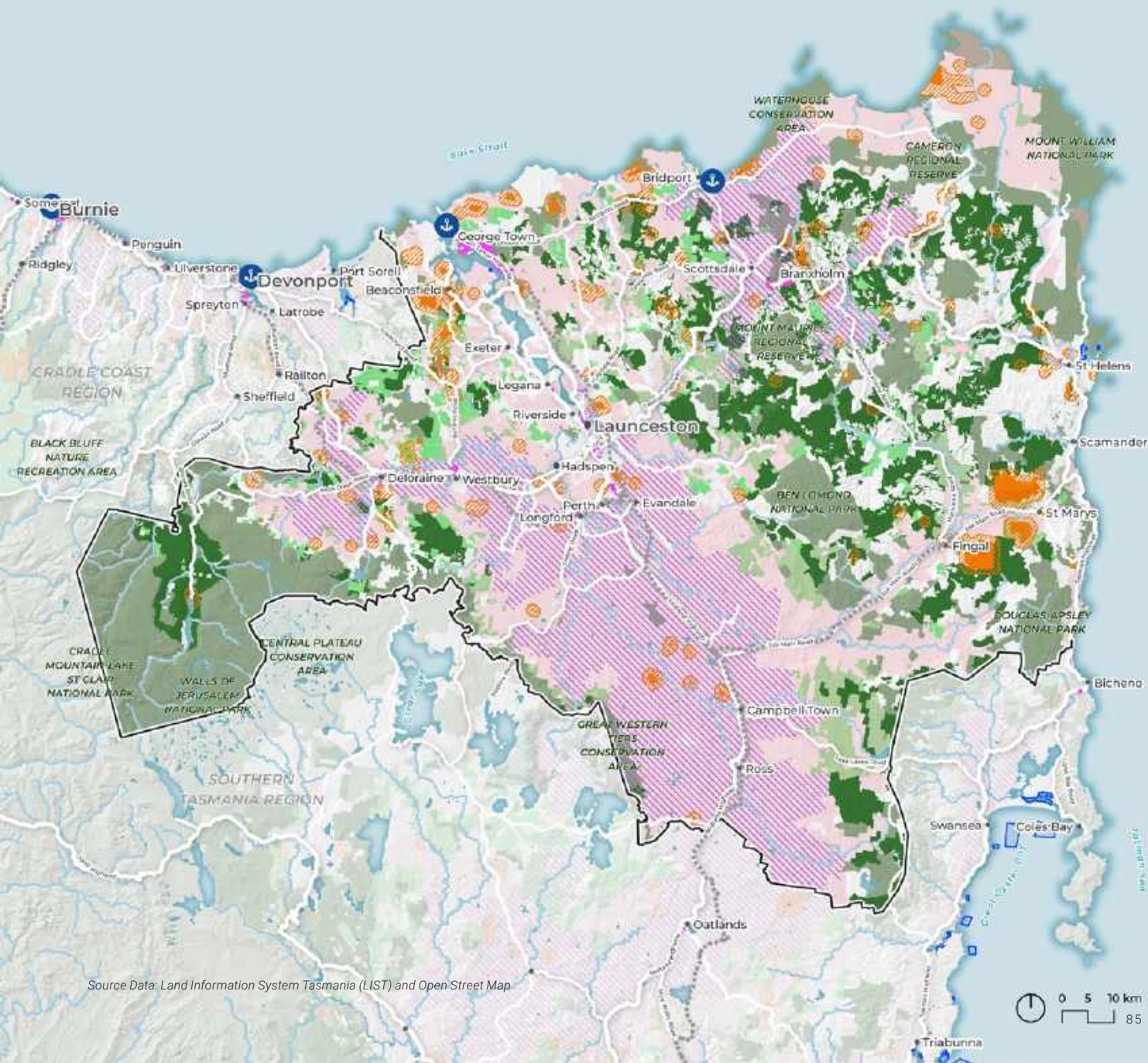
The Northern Region tourism sector was significantly impacted by the COVID-19 pandemic, like elsewhere in Australia and globally. The Region has seen immense growth in outdoor tourism, for example mountain-biking, hiking and bush-walking, vineyards and wineries, lavender farm visitation, fishing and other forms of wilderness activities.

Many tourists will choose to stay in Launceston and make day trips to key sights around the region. Towns such as Derby, Bridport, Flinders Island and north-eastern coast areas which form the Bay of Fires all experience significant short-term growth in visitation in both on and off-season periods. However the increasing demand for short stay accommodation in these areas combined with requirements for seasonal worker accommodation, is placing stress on existing infrastructure and housing supply. Whilst benefiting the local economy and driving accommodation choice to meet the demand of tourists, these benefits will need to be balanced with the availability and affordability of housing for permanent residents, key workers and seasonal workers is critical to the viability of these towns and other industries, like health care and agriculture.

Figure 15. Economic Activity & Productivity

LEGEND

- Regional Land Use
- Strategy Boundary
- Roads
- Railway
- National Parks,
Other Reserves, and
Conservation Areas
- Mining Leases and Buffer
- Agricultural Areas
- Industrial Use
- Commercial Use
- Forest Management and
Controlled Woodlands
- Private Timber Reserves
- Marine Farming
- Irrigation Districts
- Ports



Source Data: Land Information System Tasmania (LIST) and Open Street Map

0 5 10 km
85

3.3.2 Movement and Connectivity

Northern Tasmania's regional transport system comprises the National highway network, State roads, main arterial roads, council-owned roads and related infrastructure that facilitate the movement of people to and from greater Launceston, as well as across the cradle coast and southern regions.

Freight rail runs along the western edge and down through the central spine of the Region, providing connections to Bell Bay, which processes 86% of imports to Tasmania, alongside Burnie and Devonport located outside of the Region. The freight rail network extends from the intermodal terminal at Brighton (south of the Region) to Bell Bay (Tasmania's major bulk port). There are also connections to central Launceston and Fingal in the east. Bridport, on the northern edge of the Region, provides a terminal for Bass Strait ferry services to Lady Barron Port on Flinders Island. Freight ships transport livestock from Flinders Island to Bridport and the Australian mainland.

Launceston Airport, the nation's 12th busiest airport, performs well above the comparative population of the Region. In 2018/2019, the airport accommodated more than 1.35 million passengers, with this projected to grow to 2.5 million by 2040⁵⁴.

Despite its remote location, air and sea connections are maintained to Flinders Island from mainland Tasmania and Australia, providing an important passenger and freight connection to this community. However, these connections are vulnerable to inclement weather, which can disrupt the continuity of access and services.

Bass, East Tamar, and Midland Highways are the highest order roads in Northern Tasmania. The access they facilitate between cities, towns, villages and other municipalities across the Region and the broader Tasmanian highway network, is critical for local movement, regional connectivity, freight and tourism. The Industry Road and Dalrymple Road route running north/south between Launceston and the North East is continuing to grow in importance as a freight route while Frankford Road provides important connections from the north west to Bell Bay.

Main towns and settlements across the Region are serviced by a bus based public transport network. The focus of the network is to transport passengers to and from Launceston as the principal activity centre and for urban Launceston, including Prospect, Riverside, Kings Meadows and Mowbray to the Launceston CBD. Intercity services connect Launceston to the north west coast and Hobart. Regional services also connect to the east coast via Fingal/Avoca, Burnie and Devonport, St Helens and St Marys.

However, most residents in the Northern Region are reliant on cars for most of their travel. Only 1.2% of trips to work across the Region were via public transport, while 73.6% were by private vehicle.⁵⁵ Limited public transport coverage, distance between work, home and services due to low density and dispersed settlement patterns, dominant car culture and undulating topography are key reasons for the high car dependency and limited uptake of public transport across the Region.

At the same time, only 0.4% of trips to work were by bicycle and 4% via walking⁵⁶. Uptake of active transport in the Region has been limited, despite strategic initiatives and projects planned to be delivered and council specific strategic plans such as the *Greater Launceston Passenger Transport Framework and West Tamar Trail Strategy*.⁵⁷

Growth in outer urban and greenfield areas places increased pressure on the road network, while being difficult to service with public or active transport. Encouraging higher density development, particularly near existing services, is important in supporting improved economies of scale in service provision and providing greater modal choice for households. Maintaining a more efficient, reliable and functional commuter zone within Greater Launceston, connections to surrounding towns and outer villages in balance with ensuring the effective movement of freight transport across the Region, are important considerations.

Planning for a sustainable cost-effective transport network for the Northern Region requires integration of land use, transport and utilities planning. Moving toward a higher proportion of travel by public transport, walking and cycling will require a coordinated approach to land use, infrastructure and service planning. Land use planning decisions, in particular, can make a significant contribution to increasing the proportion of travel undertaken by public transport, walking and cycling. For example, by locating housing near existing public transport corridors, and supporting infill and more compact urban forms. Notwithstanding, it is recognised that not all areas, particularly Flinders, have the capability to establish an integrated public transport network.

Conflicts and competition for road capacity between freight vehicles, residents and visitors utilising main roads is also a critical issue in the Region, heightened by the challenging terrain, variable road conditions and existing bottlenecks. The engineering efforts and costs associated with the steep terrain and upgrading alignments and road conditions are also extensive and a hurdle for future planning.

Figure 16. Movement & Connectivity

LEGEND

- Regional Land Use Strategy Boundary
- Railway
- Strategic Infrastructure Corridors (Strategic and Recreational Use) Act 2016
- National Parks, Other Reserves, and Conservation Areas
- ✕ Launceston Airport
- ✕ Flinders Airport
- ⚓ Ports
- Highway/State Roads
- Arterial/Sub-Arterial Roads
- Bus Routes
- Premier Road Freight Network
- Bass Strait Island Services



Source Data: Land Information System Tasmania (LIST), Open Street Map and Overview of Tasmania's Freight System, Strategic Infrastructure Corridors (Strategic and Recreational Use) Act 2016

3.3.3 Utilities

The expansion of smaller coastal communities and rural residential areas, as more people relocate to outer towns and villages across the Region (refer to **Theme 1**), increases pressure on current infrastructure and network services areas. This pressure is exacerbated by the Region's ageing population and the opportunity to support ageing in place. Demographic shifts and population growth in the outer areas also place stress on the efficient use of existing infrastructure and necessitate the need to expand and upgrade networks.

The delivery of essential utility services such as water, sewage, electricity and telecommunications is influenced by the patterns of growth and changes in factors such as population density in residential areas, the location of major industries and employment centres and increasingly in the future, climate change. Certain industries, such as large-scale manufacturing, require substantial amounts of water or electricity, and the availability of these resources can significantly impact the choice of business location, as well as the ability to move or expand these operations.

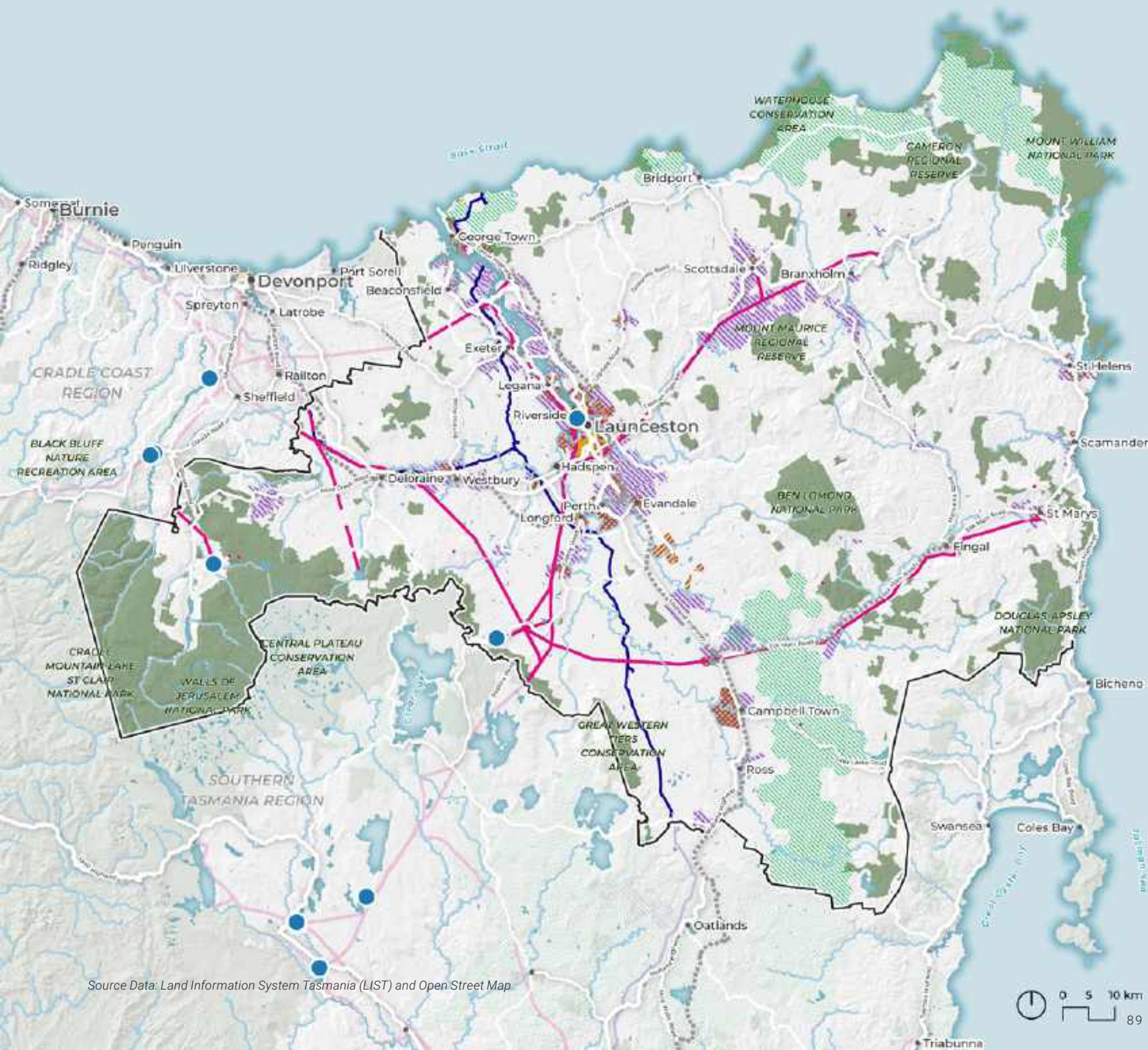
Key issues related to the provision of utilities infrastructure and services networks across the Northern Tasmanian Region include:

- Trunk utilities are concentrated on the western side of the Region, while eastern areas along the coastline are experiencing growth pressure but don't have access to trunk utilities (i.e. St Helens, Scamander, Binalong Bay).
- Inequitable distribution of costs amongst developers to support the long-term planning and delivery of key services across the Region.
- There are challenges with the telecommunications (phone and internet) infrastructure outside of existing settlements, which leads to underserviced new residential areas, such as new developments on industrial land or new residential subdivisions far from existing fixed-line networks. This constrains the likelihood of providing new connections.
- Existing connectivity issues in smaller coastal settlements and remote rural residential areas, particularly those which rely on satellite connections e.g. Flinders Island or experience population fluctuations in peak seasons.
- Frequent issues with stormwater management due to lack of necessary upgrades to ageing and insufficient infrastructure across the Region, impacting the capacity for coordinated growth.
- Issues with existing powerlines (overhead vs underground) and the associated risk considering increased likelihood of extreme weather events including more frequent and intense storms, flood events and bushfires.
- Issues with necessary service provisions for key industries (i.e. hydrogen production facilities and solar farms), where infrastructure has not kept pace with emerging economic opportunity and industrial development opportunities.
- Issues in existing built up areas that significantly restrict the capacity of existing areas to redevelop and densify (i.e. combined stormwater-sewerage, stormwater systems designed for less impervious surfaces).
- Challenges associated with coordinating and aligning growth with service provision by state government agencies (i.e. TasNetworks, Taswater), particularly in areas with changing populations or remote locations.
- Upgrades to the TasNetworks Electricity Network is required to enable the further expansion of key economic and employment hubs such as the TRANSLink Precinct and further developments at the Launceston Airport.

Figure 17. Utilities & Serviced Areas

LEGEND

- Regional Land Use Strategy Boundary
- Roads
- Railway
- National Parks, Other Reserves, and Conservation Areas
- Water Serviced Land
- Sewer Serviced Land
- Renewal Energy Zones
- Existing Hydro Assets
- Electricity Transmission Corridor
- Gas Pipeline Easement
- Gas Distribution Pipe



Source Data: Land Information System Tasmania (LIST) and Open Street Map

3.3.4 Theme 3: Opportunities and Challenges

Opportunities

- Land use planning that values and enables both traditional and emerging industries, creativity, entrepreneurship and research and development leveraging the Region's strengths.
- Planning frameworks accommodate the evolution of agricultural and tourism related businesses, recognising the benefits of co-location and integration between sectors (for example agritourism, eco-tourism, native food and bush medicine).
- Attract investment and growth of the Region's agriculture and tourism industries through the UNESCO Creative City of Gastronomy designation awarded to the Region in 2021.
- Provide for employment opportunities and attract workers, particularly to more remote parts of the Region in health care and education to support investments in major facilities and infrastructure and improve access to services for an ageing population.
- Strengthen the role of Northern Tasmania as a destination for tourism based on recreation, nature-based activities, viticulture and food.
- Build on the unique characteristics and traditional economic base of smaller towns and villages to increase and diversify local economic activity, job opportunities, improve resilience to economic cycles and impacts from mega-trends.
- Protect high quality agricultural land and invest in irrigation infrastructure, supporting innovations and continued growth in food processing and value-add food industries.
- Land use planning recognises the importance of freight infrastructure in the Region to economic development for Tasmania, and the role of key freight terminals including the Launceston Airport, the Port of Bell Bay and adjacent heavy industry precinct.
- Increase patronage of the existing public transport system by encourage infill development and consolidation to make public transport more cost-effective.
- Explore infrastructure funding options to support strategically funded provision of utilities, transport infrastructure, parks and community facilities for new, growing or changing communities.
- Collaborate with utility providers and stakeholders (energy, gas, and water) to coordinate land use and infrastructure planning to support growing and changing community needs and maximise the efficiency of infrastructure investment.

Challenges

- Protecting high-value agricultural land and natural assets from the pressures of land use change or interface issues driven by population growth and urban expansion.
- Adapting to the impacts of climate change across key sectors of the Region's economy, particularly agriculture and tourism.
- Improving access to high-value employment and training opportunities for younger people, skilled and professional people in rural and remote locations.
- The isolation of communities caused by the constraints of topography and challenges of improving transport infrastructure.
- The competing use of major roads for freight transport, tourism traffic, and residential travel creates safety issues and pressure to upgrade infrastructure often through challenging terrain.
- Protect key passenger and freight corridors from encroachment by incompatible land use and development.
- Improving coordination between councils, State government and utility companies so that planning for growth is integrated with assessment of the capacity of existing infrastructure networks and services and the costs and impacts of extending or augmenting infrastructure.
- The lack of infrastructure contribution mechanisms to support developers, spread development costs provide alternative funding sources for planning and delivery of key infrastructure needed to support growth across the Region.
- Increasing costs of infrastructure provision and ongoing maintenance across all levels of government.
- Address the tensions between different industries that rely on the same natural resources, such as forestry and tourism, or built form/land use, such as workforce and tourist accommodation.
- Protect strategic resources from incompatible land use to ensure sufficient supply of materials to the building and construction industry.



PART 4 — FINDINGS AND NEXT STEPS



4.1 Findings from the State of Play

The opportunities and challenges for each theme in **Chapter 3**, along with the insights from the eight councils in the Region in **Chapter 2**, have been reviewed and synthesised into **key findings**. Associated with the findings are **gaps, challenges** and **needs** that provide further depth and direction to inform a Vision for the Region and Regional Strategic Directions. These will in turn inform the next phases of preparing the new NTRLUS.



People, Communities and Growth

Key findings of the State of Play	Gaps, challenges and needs
Historic cultural heritage is integral to the identity of, and for bringing visitors to, many places across the Region.	- The recording, assessment and listing of historic cultural heritage is inconsistent across the eight councils in the Region. - Mechanisms to permit adaptive re-use of heritage items are limited and can be a constraint to active management, conservation and use of heritage items. - The stigma associated with heritage listed items is often seen as a deterrent for development and adaptive reuse, rather than being celebrated as a unique characteristic of the Region's identity and major drawcard for visitors and future residents.
Aboriginal people retain strong connections to Country and have valuable knowledge to contribute to sustainable land use management.	- Understanding who can speak for Country is not clear amongst non-Aboriginal people. - The history of conflict and displacement of Aboriginal people and associated trauma is particularly acute in Northern Tasmania. - The palawa's connection to lutruwita is particularly strong and is continuous in Northern Tasmania. - Policies, practices and processes for collaboration with, involvement of and leadership by Aboriginal people are opportunities to improve land use planning practice, but are currently limited in Tasmania.
The capacity to continue to supply new housing must be maintained to accommodate projected needs of a growing and changing community.	- Clear and up-to-date information on population growth and change, and population projections, including climate migration, are needed to inform the required supply of housing and plan for infrastructure. - Population forecasts do not account well for highly variable rates of growth and change that have occurred historically and are likely to occur over the 30 year life of the Regional Land Use Strategy. - Current approaches to the assessment of residential land supply and housing capacity do not fully consider the real development capacity of vacant zoned land, infill potential, consolidation opportunities, and the availability of or ability to deliver enabling infrastructure. - There are gaps between population policies at the state, regional and local levels and the links to land use planning are not clear. - Opportunities exist to proactively apply strategic land use planning to implementation of population policies around the attraction and retention of residents.
The current housing stock across the Region is not well matched with the needs of households, particularly as the population ages and households get smaller.	- The draft Tasmanian Planning Policies (TPPS) and draft Medium Density Design Guidelines aim to facilitate more diverse housing that match housing types with housing need. - Planning and delivery mechanisms (particularly under the TPS) currently constrain housing diversity by preferencing or permitting a limited range of housing types. - The TPS doesn't encourage, or in some cases permit, delivery of these housing types. - Housing is climate resilient and opportunities are identified to increase the resilience of legacy development.
Low density urban areas, towns and villages have limited housing diversity, poor access to services, jobs and amenities, and poor social outcomes.	- Social infrastructure like schools, health care, and community centres, and established transport networks are concentrated in existing urban areas and towns, and much of this infrastructure has capacity to support growth. - The costs of providing social infrastructure to support continued outward expansion are relatively high, and outward growth without appropriate planning and/or delivery of social infrastructure increases inequity and further under-utilises existing facilities. - Measures in the current NTRLUS to limit the outward growth of towns and cities are limited to urban or settlement boundaries, which are not effective on their own as a means of controlling and directing growth. - Mechanisms to encourage and enable alternatives to greenfield growth, particularly more compact and diverse urban areas, towns and villages, are limited in the TPS. - There is currently limited alignment of statutory planning provisions to State and Regional policy and strategic planning outcomes in relation to housing diversity, affordability and suitability, which constrains the planning and delivery of more compact, efficient and equitable land use patterns.



The Natural Environment, Natural Hazards and Environmental Risks

Key findings of the State of Play	Gaps, challenges and needs
Access to and appreciation of the natural environment are key attractors to people visiting or moving to the Region	- The 2024 draft Population Discussion Paper⁵⁹ and research undertaken by Destination Tasmania both clearly establish a link between visitation from interstate or overseas leading to new residents moving to the Region. Nature-based lifestyle opportunities are a key attractor. - Land use planning controls to protect areas of scenic natural value or biodiversity value are applied inconsistently. - There is a lack of funding and resourcing to undertake comprehensive assessments of scenic landscape values and biodiversity values to inform land use planning provisions
Population growth and continued outward expansion of urban areas, towns and villages risks impacting on the natural values of the Region.	- Pressures on the natural environment from a growing population are often in locations with highly sensitive or valued natural assets, particularly the coast. - Measures in the current NTRLUS and other parts of the land use planning system to contain outward growth and impacts on the natural environment have not materially changed patterns of growth.
Interactions between cities, towns, villages, infrastructure and the natural environment creates exposure to natural hazards including flooding, bushfire and coastal erosion.	- Some established towns, villages and urban areas are located on land at risk of flooding or coastal inundation, and new information including climate change modelling and more comprehensive flood modelling more accurately assesses risks. - New information is available on the potential increased extent or severity of natural hazards as a result of climate change and should be used to inform regional and local land use planning decisions. - The land use planning response to increasing natural hazard risks does not currently consider how to address issues with areas that are already developed or how to avoid exposing communities to risk when planning for growth. - The ability to improve connections within the Region is constrained by the natural environment, particularly steep topography and waterways, and natural disasters like flooding and landslip sometimes cut off access for periods of time to parts of the Region.



Economic Activity and Infrastructure

Key findings of the State of Play	Gaps, challenges and needs
Industry and economic activity are dynamic, and new ways of growing and diversifying the Region's economy are emerging.	- Land use planning is currently focused on separation of land uses and does not accommodate changes to industry and business operations particularly where different land uses (such as tourism and agricultural production) are increasingly combining to diversify and strengthen local economies. - Leveraging Launceston's role as a key centre for tertiary education and higher order services and understanding and maximising the opportunities to distribute the benefits of these strengths across the Region.
More diverse economic activity is central to supporting growth and sustaining communities in across the Region.	- A more open approach to assessing land uses that contribute to social and economic development outcomes would enable innovation, growth and diversification of the Region's economy. - Leveraging the Region's reputation for high quality food and wine through planning frameworks that permit and encourage the combination of agriculture/aquaculture and tourism enterprises.
The unique advantages of climate and geography create niche opportunities for agricultural production and aquaculture that are central to the economy of some parts of the Region.	- Protecting key agriculture and aquaculture areas in the Region including wine and food production in the Tamar Valley and Meander Valley, beef cattle on Flinders Island, wineries and fisheries on the east coast. - There is a gap in understanding for how to respond to the impacts of a changing climate in these specialist production locations, including more frequent fires, changes to water quality due to rainfall changes, changes to water temperature, availability of water for irrigation. - It is difficult to protect sensitive agricultural production (eg wineries) from interface impacts through appropriate land use controls.
An ageing population in some parts of the Region increases demand for workers in aged care, health care and retail.	- Attracting skilled and qualified workers and enabling them to stay for the long term is a challenge in more remote parts of the Region. - Families or households with multiple workers seeking financial stability are difficult to attract with the Region's current employment capacity. - Access to quality education, sports and recreation, and ongoing training and career progression are limited in some parts of the Region. This can be a constraint to attracting workers in key sectors needed to support an older community.
Maintaining and improving transport connections across the Region will support efficient movement of goods and services, growing tourism travel and expand economic development opportunities.	- Climate change is predicted to increase the intensity and frequency of floods and fires, putting already strained and expensive to maintain transport infrastructure under more pressure. - Access to Flinders Island/the Furneaux group is already impacted by adverse weather and changes to weather patterns may increase impacts on the access for both people and goods essential to the economic and social sustainability on the islands.
The broader economic benefits from key industry and logistics facilities like the Port of Bell Bay is recognised for their role in growing renewables based activities and providing for exports of the Region's produce.	Measures to protect heavy vehicle and rail access to and from the Port of Bell Bay and facilitate the efficient movement of freight from the impacts of incompatible development are unclear, and would benefit from a regional approach to avoid conflicts.
There is a growing understanding of the relative costs, benefits and issues with expanding infrastructure networks to support growth in order to meet housing needs.	- Decisions about where growth occurs and when do not fully account for infrastructure needs, costs, or impacts beyond individual council areas. - A regional approach to planning for growth that integrates infrastructure and land use planning would contribute to prioritising growth where the costs and benefits of infrastructure provision best support population and economic growth. - The lack of compact and mixed use development near key transport routes is hindering public transport patronage and efficiency (particularly in the City of Launceston) and leading to costly and inefficient to services.

4.2 Next steps for the NTRLUS

The following diagram summarises the NTRLUS drafting process. The State of Play Report will be followed by and will inform the development of a Vision and Regional Strategic Directions to conclude Phase 1 of the new NTRLUS project. Stakeholder engagement will be central to agreeing the Vision and Regional Strategic Directions in the next stage of Phase 1.

Community engagement, managed and implemented by NTDC, will also play an important role in building on and refining the findings of this report to inform the new NTRLUS.

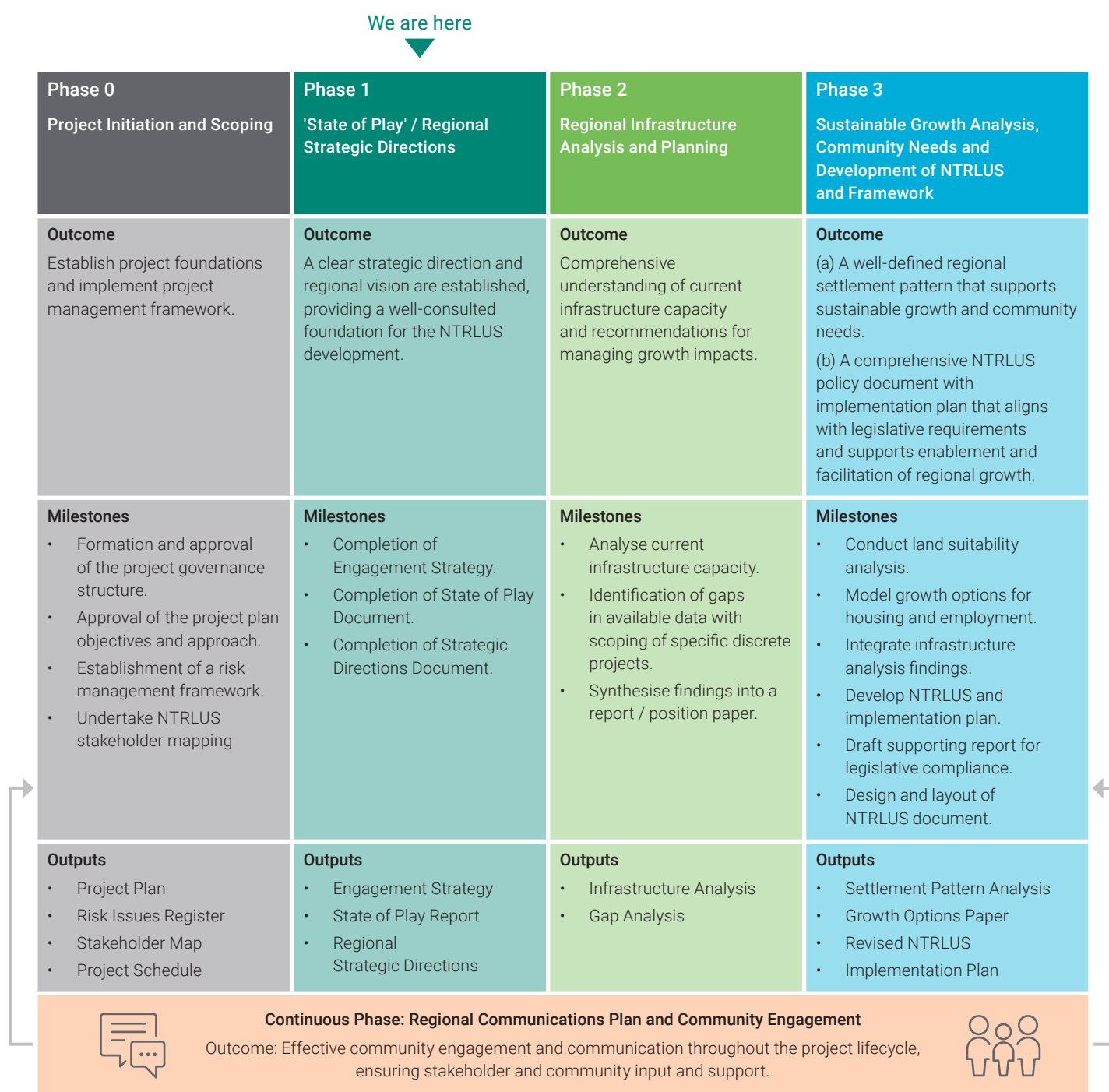


Figure 18. NTRLUS Process and Timing

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