Southern Tasmania
Regional Land Use Strategy

Background Report No. 2: The Regional Profile

March 2011

Southern Tasmanian
COUNCILS AUTHORITY

This document is detailed supporting information for the Southern Tasmania Regional Land Use Strategy 2010 - 2035.

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Acknowledgements

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1. Overview

1.1 Introduction

Across the twelve Local Government areas, the Southern Tasmania region comprises a total land area of 25,377.2 square kilometres, which constitutes 38 percent of the State's total area and is comprised of twelve (12) Local Government Areas, being Brighton, Central Highlands, Clarence, Derwent Valley, Glamorgan Spring Bay, Glenorchy, Hobart, Huon, Kingborough, Sorell, Southern Midlands and Tasman.

Southern Tasmania is the largest region of Tasmania in area and population, and contains the most densely populated and most populous city (the metropolitan area of Greater Hobart). Southern Tasmania's population comprises approximately 48% of the State's population.

The region presents a diverse landscape, which fundamentally influences within the social, economic and cultural welfare of the population.

The western part of the region, predominately defined by the Tasmanian Wilderness World Heritage Area (TWWHA), is a rugged and generally undeveloped glacially formed mountainous landscape of exceptional natural beauty situated in the path of strong moisture laden westerly winds. Natural values include glacially formed landscapes and alpine areas that present an impressive assemblage of karst and erosional features and pristine catchments. The TWWHA also holds a significant portion of cool temperate rainforests in the southern hemisphere, is highly elevated and contains Tasmania's highest mountains. The cultural and economic importance of the TWWHA to the Southern Tasmania region cannot be underestimated.

Adjacent to the TWWHA are large tracts of State Forests (referred to as the Southern and Derwent Forests). These are working forests which are managed not only for timber harvesting and regeneration but a range of other uses including tourism facilities and recreational opportunities. Smaller areas of State Forest are scattered across the remaining eastern half of the region.

Land under the management of Hydro Tasmania also comprises a significant component of region and comprises of the many hydro storage lakes and surrounding land in the western and highlands area. Land owned and managed by Hydro Tasmania is identified as private land and has not been included within the area under public land tenure.

Settlement and economic activity is focussed in the eastern half of the region. Greater Hobart is located at is geographic centre. Integral to the sense of place of Greater Hobart is the Derwent River, Mount Wellington and its surrounding mountain range and foothills. These natural features have significantly shaped the development of the urban area.

The Local Government areas comprising the Southern Tasmania region interrelate not only economically, but also through common physical, social and natural resources. Well developed industries such as agriculture, tourism, forestry and wild & farmed fisheries are dependent on the quality of the natural resource for long term viability and sustainability. There is also a high dependence on natural resources for urban maintenance functions through provision of electricity, clean air and water. The natural values of the Southern Tasmania region also provide exceptional recreational opportunities for the community as well as visitors to the State. Tourism opportunities are strongly based on these natural values as well as the historic heritage values of the region.

Notwithstanding these interrelationships, several distinct areas spreading out from Greater Hobart can be identified:

- To the north-west is the Derwent Valley district, characterised by the valley floor of the Derwent River and the immediately surrounding agricultural land, which due to access to water from the Derwent River, has had a history of crop production (hops and fruit) as well as grazing. More recently urban development from Greater Hobart has encroached into this area;
- To the north are the southern portions of the midlands district: an area characterised by broad valleys divided by timbered ranges of hills generally rising in elevation towards the north with the lowest rainfall in the State. The agricultural base is mainly constituted by large extensive dryland grazing and cropping land holdings with relatively small areas of intensive horticultural investment, where irrigation is available. Tourism based upon cultural heritage, whilst currently small, is rising in importance;
- In the far north-west of the region is the highland lakes district that is characterised by over 4000 lakes within a rugged and relatively undeveloped natural setting high in elevation. Hydro electric power production has driven the majority of development in the area, along with numerous small shack settlements, catering to world class recreational wild trout fishing industry.
- To the south are the Huon and Channel districts, which have historically been used for intensive horticultural and agricultural production (in particular apples and other fruits) and forestry. More recently, the area has become increasingly defined by activity associated with the aquaculture industry. Tourism and alternative lifestyle opportunities are also distinct characteristics.
- To the east of Greater Hobart is the East Coast. Characterised by small coastal settlements, the area is an important holiday district for locals and visitors due to its highly attractive natural assets. Fishing (wild and farmed), forestry and agriculture are also identified characteristics of the area.

The diversity of the region means that there will not be a ‘one fit’ solution for the whole region. The Regional Land Use Strategy arising from this project will address broad planning policies and actions. As recognised in the Decision Making Principles for the Regional Land Use Strategy, the more detailed and specific settlement strategy component will be divided into two sub-categories: one covering the metropolitan area of Greater Hobart and the other the remaining regional area. This approach recognises that major land use decisions in the metropolitan area have ramifications across the whole region and therefore need to be more carefully considered at the regional level.

The Regional Land Use Strategy will also need to recognise the important of sub-regional and local level planning in responding to the diversity of the region.

2. Understanding the Social-Economic Profile

2.1 Introduction

Decisions that relate to use and development play an important role in the achievement of both environmental and social goals for the region. In order to manage and strategically plan for growth and change that caters for the needs of the population, the characteristics of the population as they are now and may be in the future must be acknowledged and understood.

Effective regional planning requires analysis of the social, environmental and economic linkages between Southern Tasmania and Tasmania's two other regions: the Northern and Cradle Coast (north-west) regions; and analysis of the social, environmental and economic linkages within the region.

The data and analysis presented in this profile is based substantially on the Australian Bureau of Statistics (ABS) data. Information and analysis on population trends and ageing was drawn from the Demographic Change Advisory Council (DCAC), using the medium growth scenario.

The Southern Tasmania region being comprised of the twelve southern Councils has a boundary identical to that for the ABS Statistical Region. Under ABS classifications the Region is divided into sixteen (16) Statistical Local Areas. Where a Local Government Area is divided into Part A and Part B (as is the case with Derwent Valley, Kingborough and Sorell), Part A refers to the higher density, urban areas, whilst Part B refers to the lower density, rural areas. See Figure 1.

Further distinction is made between the Greater Hobart area and the remainder of the region. For the purposes of this strategy, Greater Hobart consists of Hobart Inner, Hobart Remainder, Glenorchy, Clarence, Brighton, Kingborough Part A and Sorell Part A.

The ABS defines various statistical units for the purposes of data collection and analysis. The major units are:

- **SD Statistical Division:** Largest geographic unit after the State/Territory; consists of one or more Statistical Subdivisions.
- **SSD Statistical Subdivision:** A regional geographic unit consisting of one or more SLAs
- **SLA Statistical Local Area:** A unit consisting of one ore more Collector Districts (area unit of approx. 200 households) based on LGAs or part thereof.
- **LGA Local Government Areas:** A geographic area under the responsibility of an incorporated local government.

The major units and their relationship to each other, with examples from the Southern Tasmania Region are shown below:

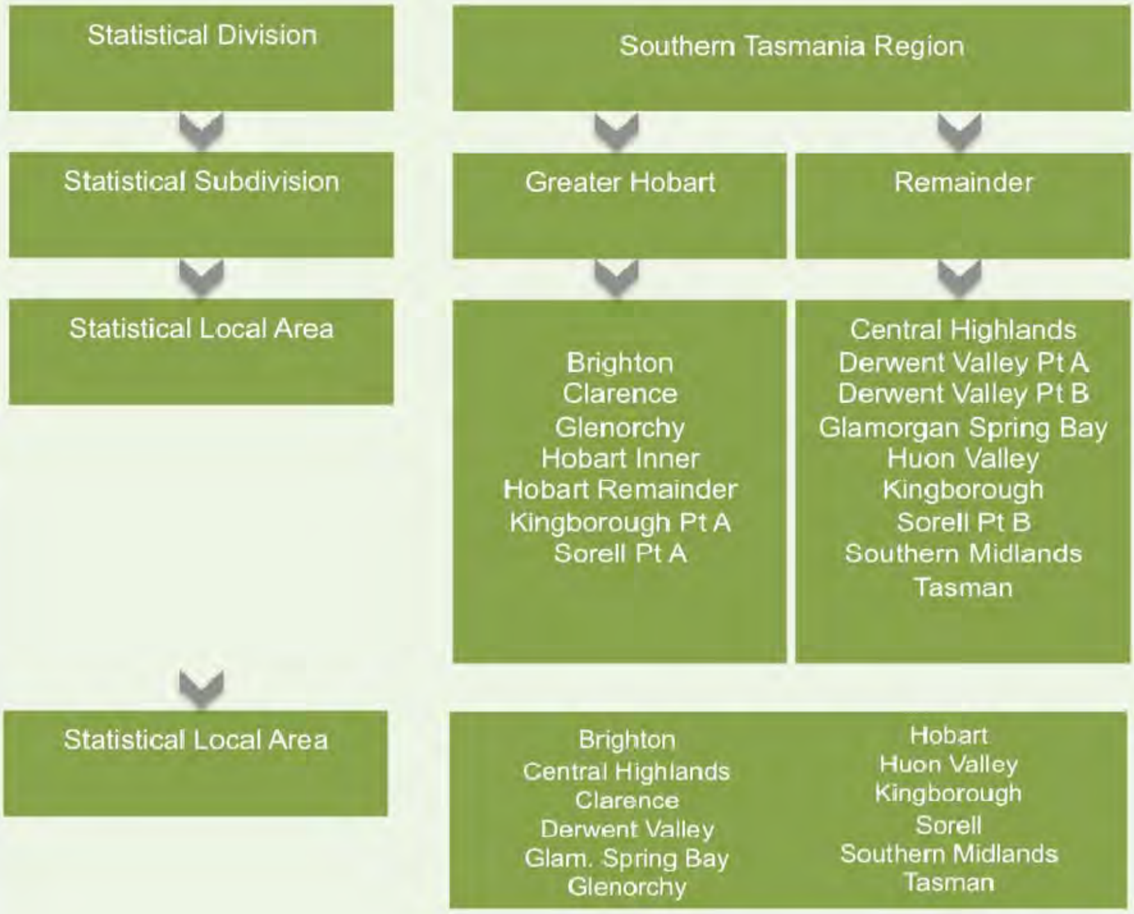

Figure 1: ABS Statistical Information *(Source: DIER 2006)*

3. Population and Social Characteristics

3.1 Current Population and Recent Population Growth

On census night 2006, Southern Tasmania had a total population of 235 458. Approximately 82% of the population live in the metropolitan area of Greater Hobart. Greater Hobart comprises all or part of the Local Government areas of Hobart, Clarence, Glenorchy, Kingborough, Brighton and Sorell. The region as a whole represents approximately 48% percent of the total Tasmanian population, which was 476,481 as of the 2006 Census.

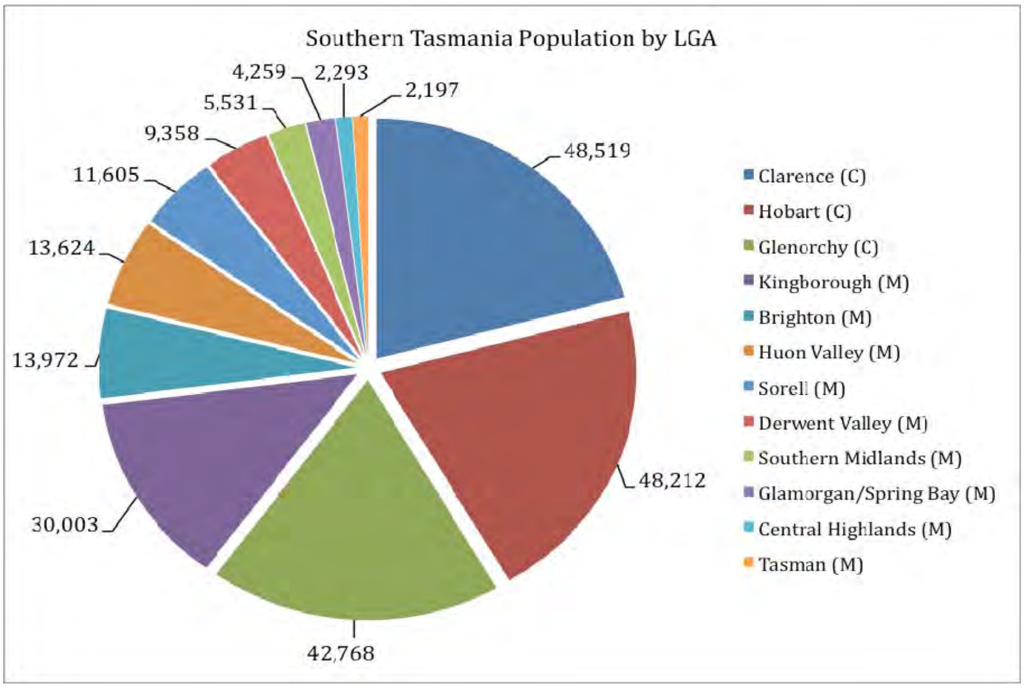

Figure 2: Southern Tasmania Population Chart *(Source: ABS Census, 2006)*

Over 2001- 2009, the Southern Tasmanian region has experienced an average annual population growth rate of 1.4%. The estimated residential population increased by 17,621 from 2001 to a total of 249,475 in 2009 (see Table 1). This growth is consistent with the Greater Hobart area where the population grew 14,315 (0.7%) to a total of 205,113 over the same period. As of 2009, the most populous LGAs in the Region are Clarence, Hobart and Glenorchy. No one Council dominates in terms of population with these three roughly equal and a fourth, Kingborough, a growing contender.

Population grew 6.5% for both Greater Hobart and the region as a whole over the nine-year period from 2001-2009 with all SLAs reporting positive growth. As shown by Figure 2, the greatest nominal growth was in Kingborough, Brighton and Hobart, whilst the smaller areas of Tasman, Southern Highlands and Central Highlands reported little change. The highest percentage change was seen on the edges of the major urban area in Brighton, Kingborough and Sorell with increases of 18%, 22.5% and 26.1% respectively.

Figures 3 & 4 show the population change across the region and Greater Hobart on a suburb basis. Strong growth is evident on the urban fringe of Greater Hobart in comparison to in established urban areas. The trend towards sea-change and tree-change residential lifestyles across the region is also evident.

Table 1: Estimated Residential Population by SLA 2001 – 2009 *(Source: ABS Estimated Residential Population 2009)*

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR
Brighton	12,915	13,028	13,205	13,640	14,030	14,364	14,822	15,198	15,807	2.0%
Central Highlands	2,316	2,309	2,355	2,308	2,350	2,318	2,316	2,339	2,324	0.0%
Clarence	49,594	49,572	49,750	50,096	50,316	50,796	51,143	51,506	52,140	0.5%
Derwent Valley	9,373	9,313	9,401	9,371	9,537	9,684	9,759	9,920	10,036	0.7%
Glam. Spring Bay	3,989	3,984	4,075	4,184	4,330	4,353	4,406	4,464	4,500	1.3%
Glenorchy	44,003	43,974	44,360	44,532	44,062	44,238	44,294	44,433	44,628	0.2%
Hobart	47,446	47,739	48,277	48,880	49,237	49,429	49,577	49,611	49,887	0.5%
Huon Valley	13,846	13,917	13,968	14,180	14,336	14,469	14,650	14,858	15,134	0.9%
Kingborough A	26,804	27,057	27,511	28,011	28,462	28,901	29,368	30,019	30,620	1.4%
Kingborough B	2,575	2,562	2,657	2,709	2,748	2,748	2,791	2,794	2,844	1.1%
Sorell A	10,036	10,137	10,263	10,487	10,770	11,094	11,400	11,732	12,031	1.8%
Sorell B	986	993	1,037	1,036	1,049	1,063	1,051	1,073	1,096	1.1%
Southern Midlands	5,730	5,758	5,791	5,834	5,827	5,839	5,863	5,934	6,054	0.6%
Tasman	2,259	2,260	2,222	2,258	2,270	2,316	2,299	2,317	2,374	0.5%
Greater Hobart*	**190,798**	**191,507**	**193,366**	**195,646**	**196,877**	**198,822**	**200,604**	**202,499**	**205,113**	**0.7%**
Southern Region	**231,854**	**232,603**	**234,872**	**237,526**	**239,324**	**241,612**	**243,739**	**246,162**	**249,475**	**1.4%**

* See Figure 1

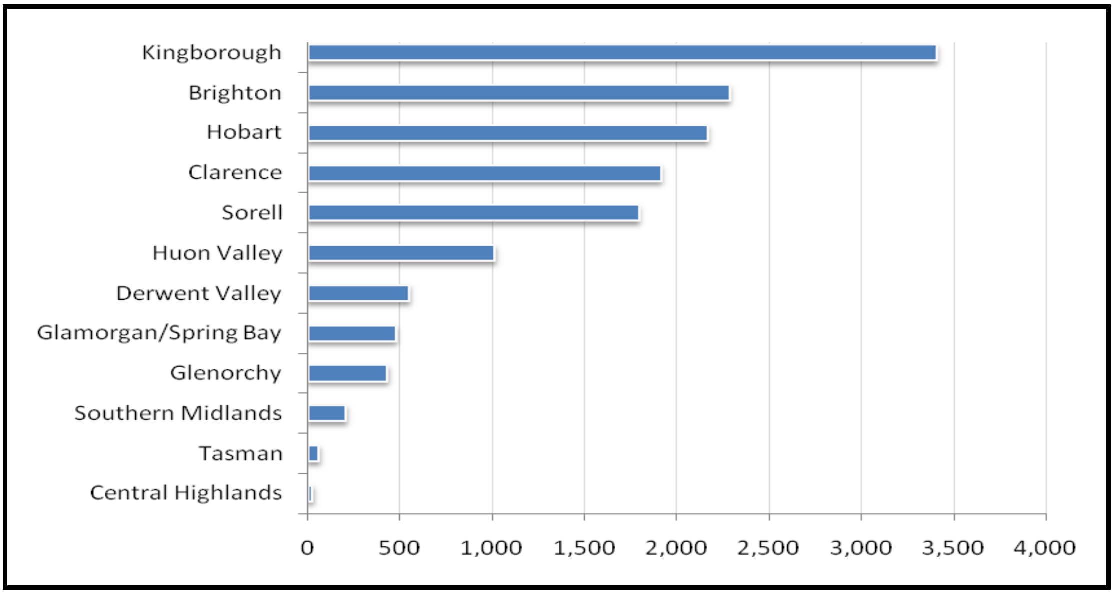

Figure 3: Population Growth by LGA, 2001 – 2009 *(Source: ABS Estimated Residential Population 2009)*

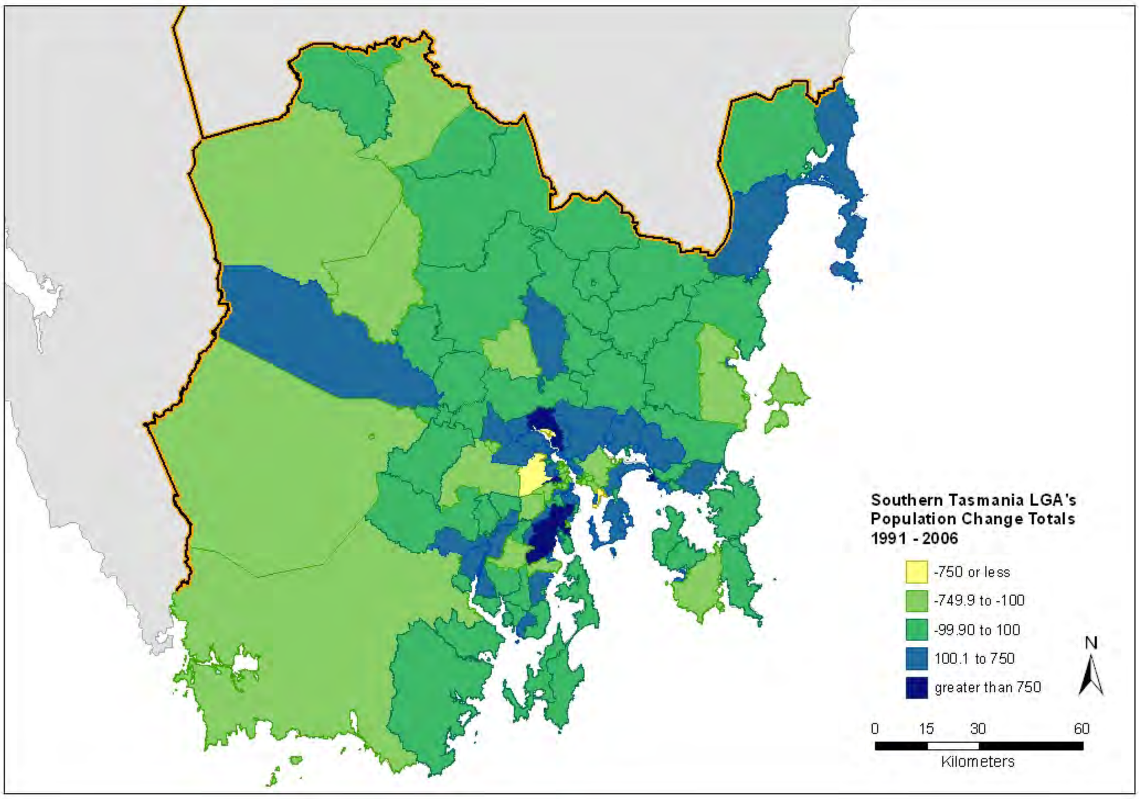

Figure 4: Southern Tasmania Population Change, 1991 – 2006 *(Source: ABS Census)*

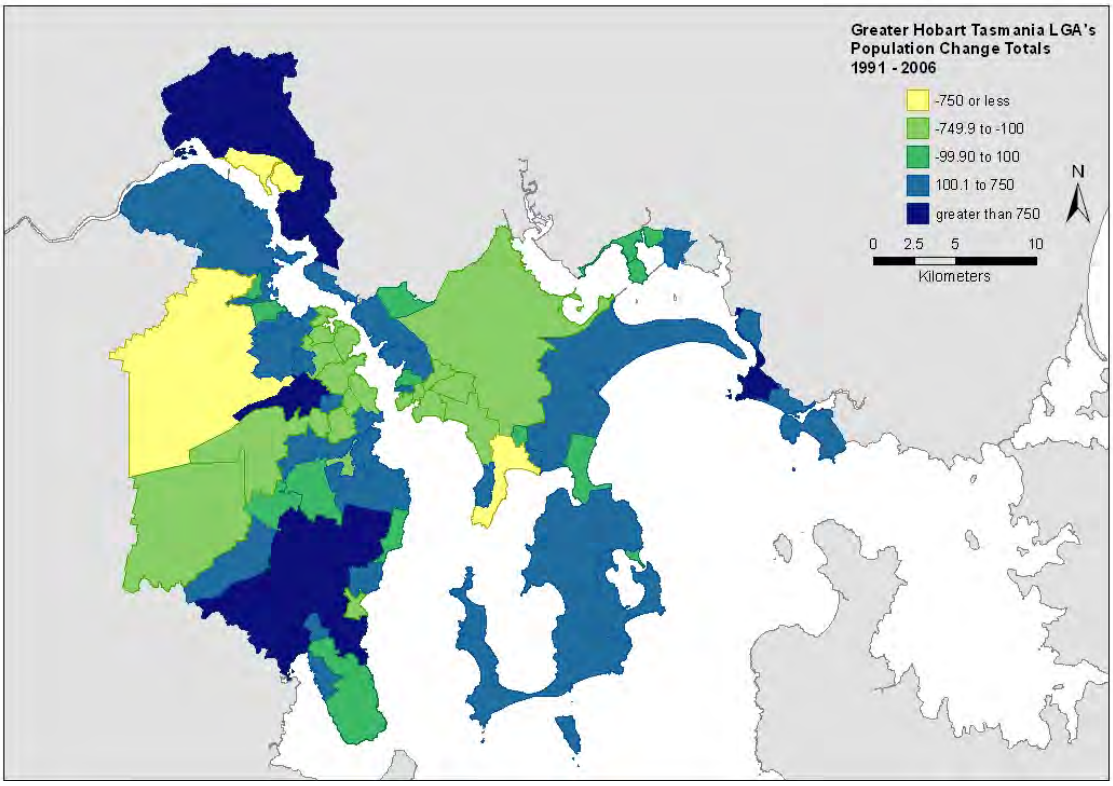

Figure 5: Greater Hobart Population Change, 1991 - 2006 *(Source: ABS Census)*

3.2 Population Growth Over Time

Over the 25-year period from 1986 – 2006, Census data shows that Southern Tasmania's population increased by 14.57% from 207,189 to 235,458 persons. Sorell (LGA) experienced the highest rate of population growth in this period, increasing a total of 46.5%, from 6,348 to 11,927 persons. Kingborough, Brighton and the Huon Valley LGA'S also experienced higher levels of population growth with increases of 30.7%, 23.1% and 22.5% respectively. Medium population growth was also experienced in the outer areas of, Tasman and Southern Midlands, Tasman and Glamorgan Spring Bay (19.7%, 19.5% and 11.7% respectively) providing further evidence of the trend towards sea change and tree-change residential lifestyles.

Not all Southern Tasmania recorded positive growth within this 25-year period. The residential populations of the LGAs of Central Highlands and Derwent Valley experienced declines of 38% and 5.9% respectively. The substantial decline in residential population of Central Highlands can in part be attributed to the abandonment of temporary Hydro Villages such as Tarraleah and Wayatinah as the associated workforce was relocated to new projects. Increased mechanisation and rationalisation of the agricultural and forest industries in both Central Highlands and Derwent Valley can also be cited as factors which influenced the decline in population. In the Derwent Valley, the gradual decline and eventual closure in 2000 of the Royal Derwent Hospital, in addition to the increasing mechanisation of the Boyer Paper Mill would have also influenced the decline in residential population.

Although at an LGA level Hobart experienced population growth of less than 1%, this figure is heavily influenced by the substantial population decrease in the SLA of Inner Hobart from 1002 persons in 1986 to 456 persons in 2006. Population growth in the SLA of Hobart (Remainder) did however experience an increase of 1.9%. For the region as a whole, the residential population of Greater Hobart has experienced a slightly higher rate of growth than the remaining region, with recorded growth rates of 16.42% and 12.9% respectively.

The strong growth in urban fringe areas and low growth in established areas has therefore been a consistent trend for the past 25 years.

Table 2: Residential Population Growth by SLA 1986 - 2006 (*Source: ABS Census 1986-2006*)

	1986	1991	1996	2001	2006	Total Growth	% Growth
Brighton	10,853	12,462	12,462	12,539	14,122	3,269	23.1%
Central Highlands	3,097	2,539	2,539	2,350	2,241	-856	-38.2%
Clarence	46,879	47,363	47,363	47,320	49,637	2,761	5.6%
Derwent Valley	10,045	9,473	9,473	9,005	9,482	-563	-5.9%
Glamorgan Spring Bay	3,715	4,012	4,012	4,036	4,188	473	11.3%
Glenorchy	40,883	43,002	43,002	42,445	43,413	2,350	5.8%
Hobart	47,356	46,369	46,329	46,622	47,703	347	0.73%
Huon Valley	10,854	12,887	12,887	13,141	14,001	3,147	22.5%
Kingborough Pt A	18,936	24,483	24,483	25,422	28,221	9,285	32.9%
Kingborough Pt B	1,870	2,113	2,286	2,456	2,617	747	28.5%
Sorell Pt A	5,793	7,344	7,286	9,584	10,894	5,101	46.8%
Sorell Pt B	555	630	950	931	1,033	478	46.3%
Southern Midlands	4,554	4,992	5,325	5,581	5,668	1,114	19.7%
Tasman	1,802	2,092	2,239	2,250	2,238	436	19.5%
Greater Hobart*	**170,697**	**178,243**	**180,965**	**183,932**	**193,990**	**10,132**	**16.4%**
Southern Region	**207,189**	**217,159**	**220,676**	**222,619**	**235,458**	**28,269**	**14.6%**

3.3 Population Projections

From an economic and strategic planning perspective, it is important to consider forecasts for population growth.

Table 2 below illustrates the five year growth trend leading up to 2007, using ABS Estimated Resident Population figures. Population forecasts are then provided in five year intervals up to 2032 based on medium growth scenario estimates undertaken by the State's Demographic Change Advisory Council (DCAC) (Department of Treasury and Finance).

DCAC estimates are derived from projecting past trends through a number of general assumptions and they do not take into account known looming constraints to significant further residential expansion in some hitherto high growth areas. At best they present a very approximate picture of what may occur in the absence of any strategic intervention on the part of the Regional Planning Project.

From the table below we see that population growth rate, based on projecting past trends, is expected to decrease over time for most areas. High growth areas such as Brighton and Sorell are expected to maintain the highest growth rates although this rate is expected to decline over each five year period. Hobart is expected to undergo stable growth whilst Kingborough is not expected to maintain the high growth shown over the 2012- 2017 period.

Table 3: Five Yearly Population Growth Trends and Forecasts, 2002-2032 *(Source, ABS Estimated Residential Population 2009 and Demographic Change Advisory Council)*

	2002-2007 Change		2008-2012 Change		2013-2017 Change		2018-2022 Change		2023-2027 Change		2028-2032 Change	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Brighton	1,449	11.2%	1,852	12.5%	1,898	11.4%	1,968	10.6%	2,018	9.8%	2,041	9.0%
Central Highlands	2	0.1%	68	2.9%	44	1.8%	18	0.7%	-7	-0.3%	-53	-2.2%
Clarence	1,202	2.4%	1,241	2.4%	1,011	1.9%	857	1.6%	698	1.3%	572	1.0%
Derwent Valley	311	3.3%	388	4.0%	335	3.3%	311	3.0%	256	2.4%	176	1.6%
Glam Spring Bay	364	9.1%	326	7.4%	258	5.5%	211	4.2%	150	2.9%	92	1.7%
Glenorchy	235	0.5%	233	0.5%	39	0.1%	-66	-0.1%	-172	-0.4%	-286	-0.6%
Hobart	1,983	4.2%	1,747	3.5%	1,792	3.5%	1,832	3.4%	1,766	3.2%	1,675	3.0%
Huon Valley	623	4.5%	563	3.8%	470	3.1%	399	2.5%	275	1.7%	122	0.7%
Kingborough	2,270	7.7%	1,307	4.1%	2,906	8.7%	1,977	5.4%	1,870	4.9%	1,757	4.4%
Sorell	1,153	10.5%	1,093	8.8%	1,053	7.8%	1,032	7.1%	984	6.3%	879	5.3%
Southern Midlands	109	1.9%	-15	-0.3%	-87	-1.5%	-132	-2.3%	-30	-0.5%	-121	-2.2%
Tasman	57	2.5%	100	4.3%	7	0.3%	27	1.1%	32	1.3%	61	2.5%
Greater Hobart*	**8,603**	**4.2%**	**7,861**	**3.7%**	**9,034**	**4.1%**	**7,911**	**3.4%**	**7,420**	**3.1%**	**6,814**	**2.8%**
Southern Region	**9,758**	**4.2%**	**8,903**	**3.7%**	**9,726**	**3.8%**	**8,434**	**3.2%**	**7,840**	**2.9%**	**6,915**	**2.5%**

* see Figure 1

From 2012, Greater Hobart is expected to grow at a higher rate than the Southern Region as LGAs such as Southern Midlands and Central Highlands start to decline. Both areas are subject to diminishing returns of population growth with the five yearly change over 2002- 2007 dropping from 4.2% in both areas to 2.8% and 2.5% for Metro Hobart and Southern Regions over the 2027- 2032 period.

Population forecasts suggest areas such as Brighton, Kingborough and Hobart are to experience the greatest nominal population rise (see Figure 4). In particular, Brighton's population is anticipated to increase by over 9,400 residents or 62% between 2007 and 2032. Also expecting a large percentage increase is Sorell with forecasts indicating a 37% rise from current levels. Only the LGAs of Southern Midlands and Central Highlands are expected to have a decreasing residential population. Population projections for Greater Hobart indicate a growth of slightly fewer than 37,000 residents or just over 17%. Similarly for the Southern Region, a resident population some 16% or 39,400 larger is anticipated come 2032. Change in population over time is shown graphically in Figure 6.

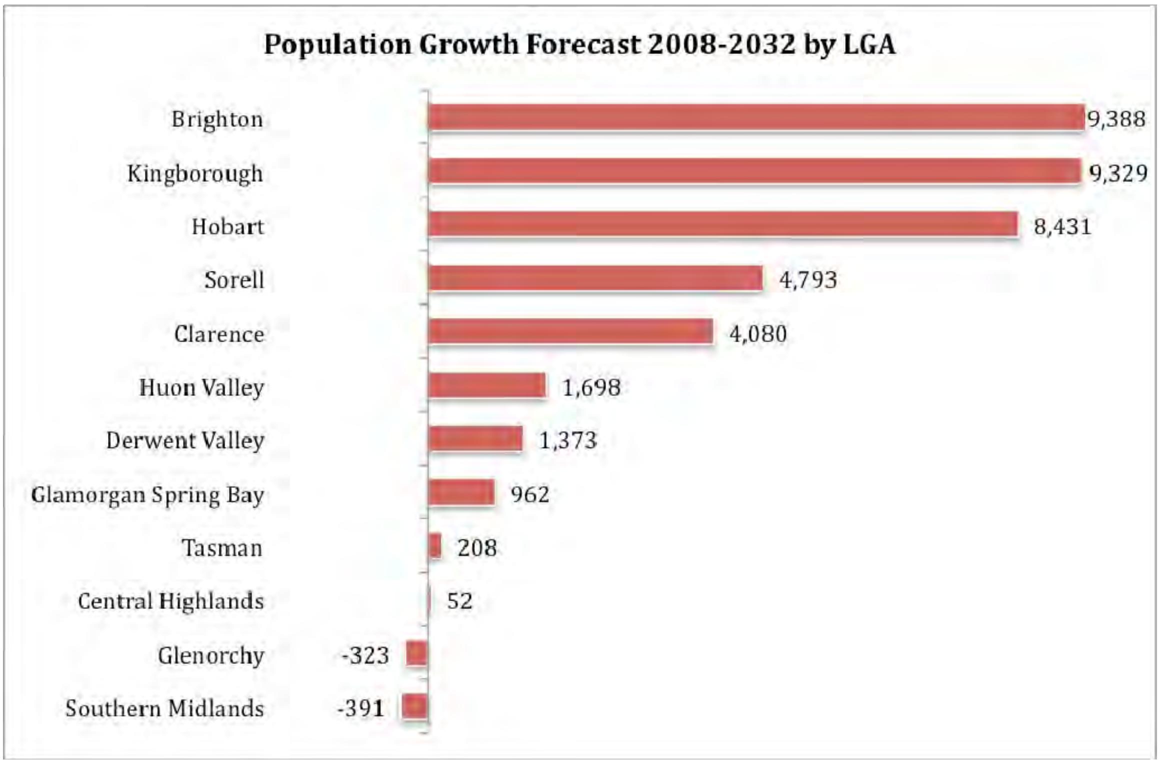

Figure 6: Population Growth Forecasts by LGA 2008-2032 *(Source: Demographic Change Advisory Council (DCAC))*

As alluded to above, it should be noted that all population forecasts are subject to significant uncertainties; Population growth in a particular location can be strongly influenced by availability and cost of residential development opportunities and planning constraints affecting this, by new or declining employment opportunities, and by the relative attractiveness of locations associated with lifestyle, physical setting and social status. The biggest uncertainties arise from migration both locally and to and from the region, not from births and deaths.

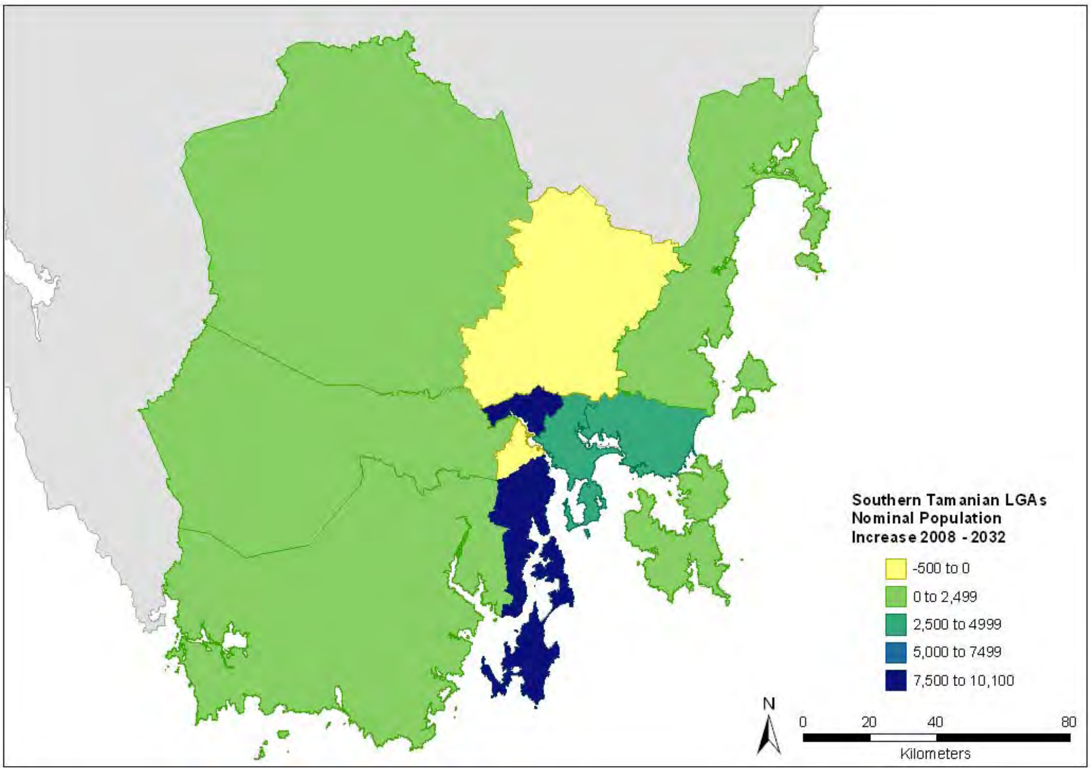

Figure 7: Nominal Population Increase by LGA, 2008–2032 *(Source: DCAC)*

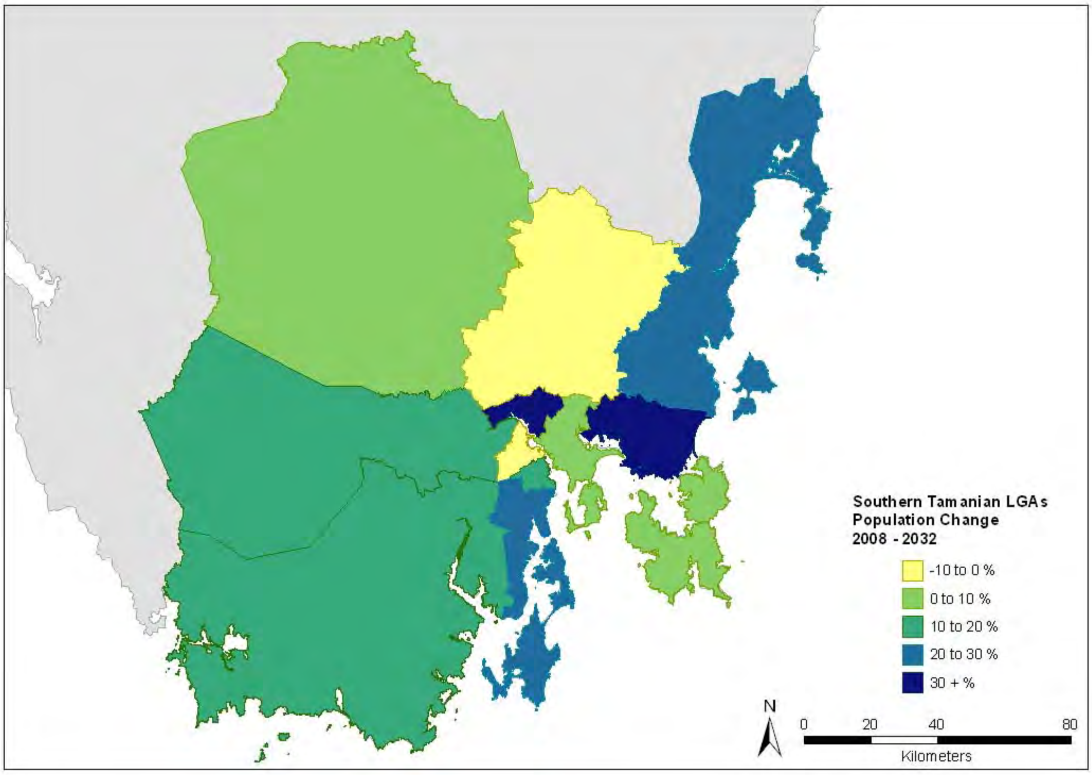

Figure 8: Percentage Population Increase by LGA, 2008-2032 *(Source: DCAC)*

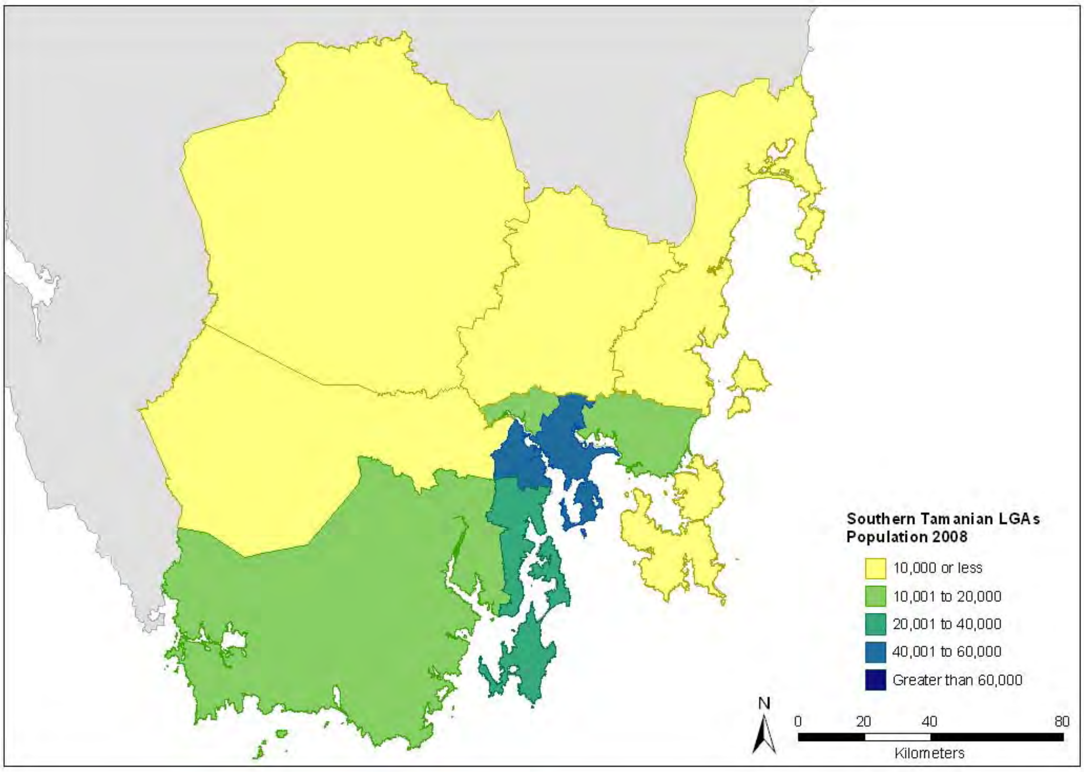

Figure 9: Population by LGA, 2008 *(Source: DCAC)*

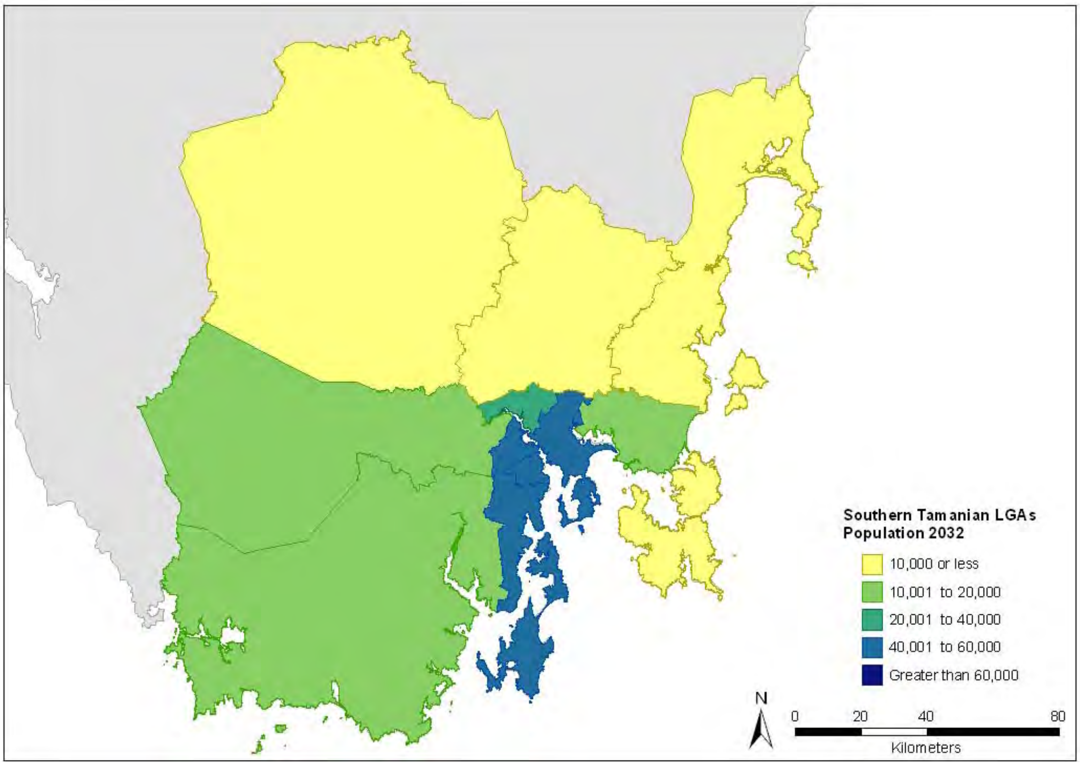

Figure 10: Population by LGA, 2032 *(Source: DCAC)*

Generally the population of the region is concentrated around Hobart and the more accessible inner Council areas of, Glenorchy, Clarence, and Kingborough. The next most populous Council areas near Hobart are Brighton, Derwent Valley, Huon Valley and Sorell. Derwent Valley, Huon Valley and (to a lesser extent) Sorell have large natural areas including significant conservation areas, and the concentration of population is towards Hobart. Areas experiencing the highest growth are also generally closer to Hobart, including Hobart, Brighton, Kingborough and Clarence. An exception is Glenorchy where there has been little current growth and growth is projected to slow and then decline over the forecast period for a net decrease. Sorell is an area experiencing significant growth somewhat physically removed from Hobart, however this growth rate is forecast to reduce over time.

3.4 Age Profile

Since 1996, the median age of Southern Region residents has been increasing. In the ten years ending 2006, all LGAs showed an increase in the median age of the residential population. The average median age across all LGAs was 34.1 years in 1996, rising to 39.6 years in 2006 (see Table 4).

Table 4: Median Ages by LGA, 1996 – 2006 *(Source: ABS Census)*

	1996	2001	2006	10 yr change %
Brighton	26	29	31	5
Central Highlands	35	39	43	8
Clarence	35	38	39	4
Derwent Valley	33	36	38	5
Glamorgan Spring Bay	39	43	47	8
Glenorchy	35	37	38	3
Hobart	34	36	37	3
Huon Valley	34	36	39	5
Kingborough	34	37	38	4
Sorell	32	36	39	7
Southern Midlands	35	36	39	4
Tasman	37	41	47	10
Average	**34.1**	**37**	**39.6**	**5.5**

Tasmania's population has been ageing since the late 1960s when Census data indicated a turning point in the median age. The percentage of Tasmanians aged less than 15 years has declined over time, and the percentage aged 65 and over has increased. It is projected that Tasmania's population will experience ageing more rapidly than, and before, all other Australian States and Territories.

Local Government Areas located on the periphery of the region have higher median ages in comparison to areas surrounding the capital city. In 2006, Glamorgan Spring Bay, Tasman and Central Highlands all reported a median age over 40 years with Tasman and Central Highlands experiencing a 10 and 8 year increase from 1996 median ages. This is the legacy of the failure of many of these areas to hold their young adult population in the past, albeit the attraction to retirement age people to move to areas such as the east coast. In contrast, the median age in Brighton is well below that of other regions with a median of 31 years in 2006, driven largely by the high concentration of public housing and the client groups that it catered for.

In general the areas closer to Hobart have a lower median age. This reflects the propensity of the working age population to locate near the employment centres of Greater Hobart, and families to locate in these areas close to schools and higher education. This is enhanced by the number of students at the university drawn from outside the region.

These findings are reflected in the age and sex pyramids for the region. As shown below, the pyramid forms a ‘block’ shape. Young people, aged between 0-14 years accounts for around 19% of the total population. Those of a working age between 15-64 years represent 66% of the population whilst mature age persons 65 years and over account for 15% of the Southern Region community. The ‘gap’ in young adults arises from the departure of many young people to mainland centres for employment and education opportunities – and to get a taste of the wider world.

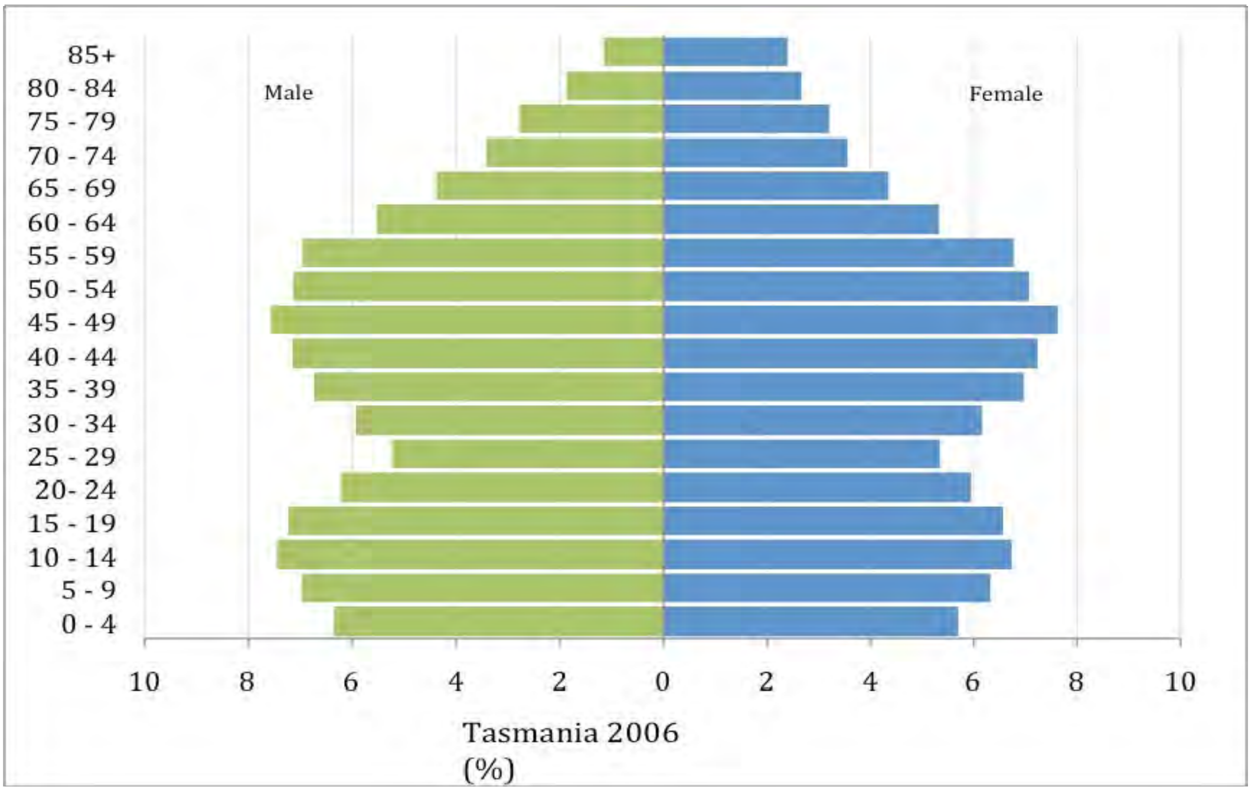

Figure 11: Age and Sex Pyramid, Tasmania, 2006 *(Source: ABS Census)*

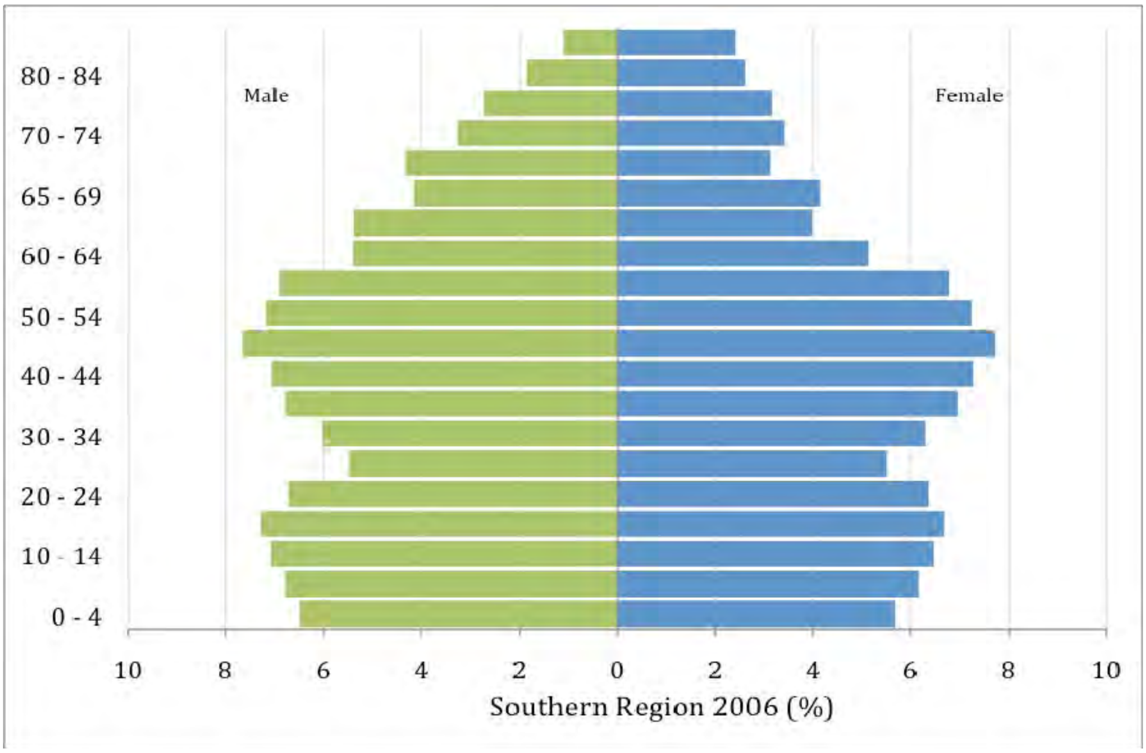

Figure 12: Age and Sex Pyramid, Southern Tasmania, 2006 *(Source: ABS Census)*

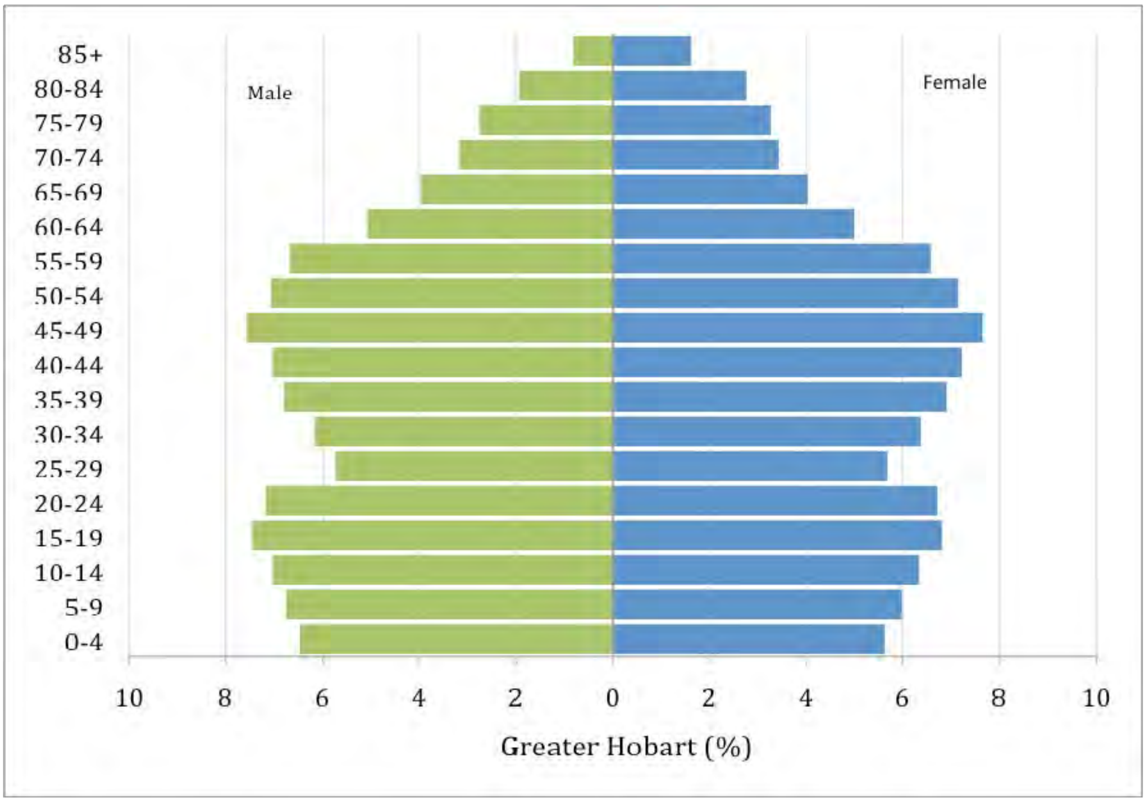

Figure 13: Age and Sex Pyramid, Greater Hobart, 2006 *(Source: ABS Census)*

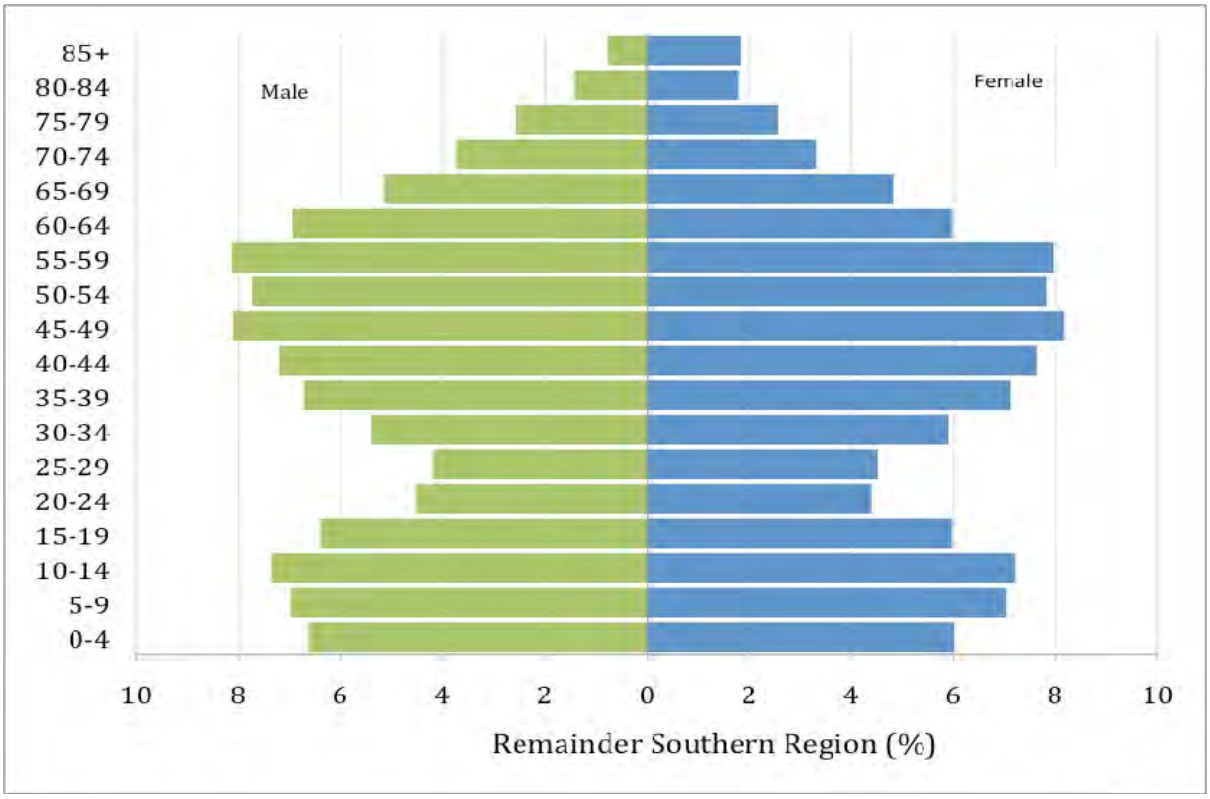

Figure 14: Age and Sex Pyramid, Regional Southern Tasmania, 2006 *(Source: ABS Census)*

3.5 Ageing Population

Tasmania's population is ageing both numerically and structurally:

- **Numerical ageing** refers to the absolute increase in the numbers of aged persons due to improvements in life expectancy; and

- **Structural ageing** is measured in terms of the increase in the proportion of the population aged 65 and over, as the declining birth rate brings about a decrease in the proportion of the population that is young. Tasmania's structural ageing is considered 'premature' due in part to excessively high net migration loss of young adults and in part to smaller but equally significant gains of older migrants.

Two features of ageing that play a part in Tasmania's ageing population are natural decline and absolute decline. Natural decline will occur as deaths exceed births, a situation expected to occur in Tasmania within the next two decades. Absolute decline will occur if the number of migrants are insufficient to replace the decreased births and increased. According to research undertaken by Natalie Jackson by 2051:

- 13.3% of Tasmania's population is projected to be aged under 4 years, compared to 20.1% in 2004;

- 33.8% of the population is projected to be aged over 65 years, compared to 14.3% in 2004; and

- The median age is expected to increase to 52.

Notwithstanding the limitations of long term projection, given the uncertainty of external influences on migration (for example the relocation of existing residents in mainland cities due to negative amenity impacts of accelerating and large population increases), analysis of the projections by the Demographic Change Advisory Council also support this research. Figures 15 & 16 below show the spatial analysis of the ageing population.

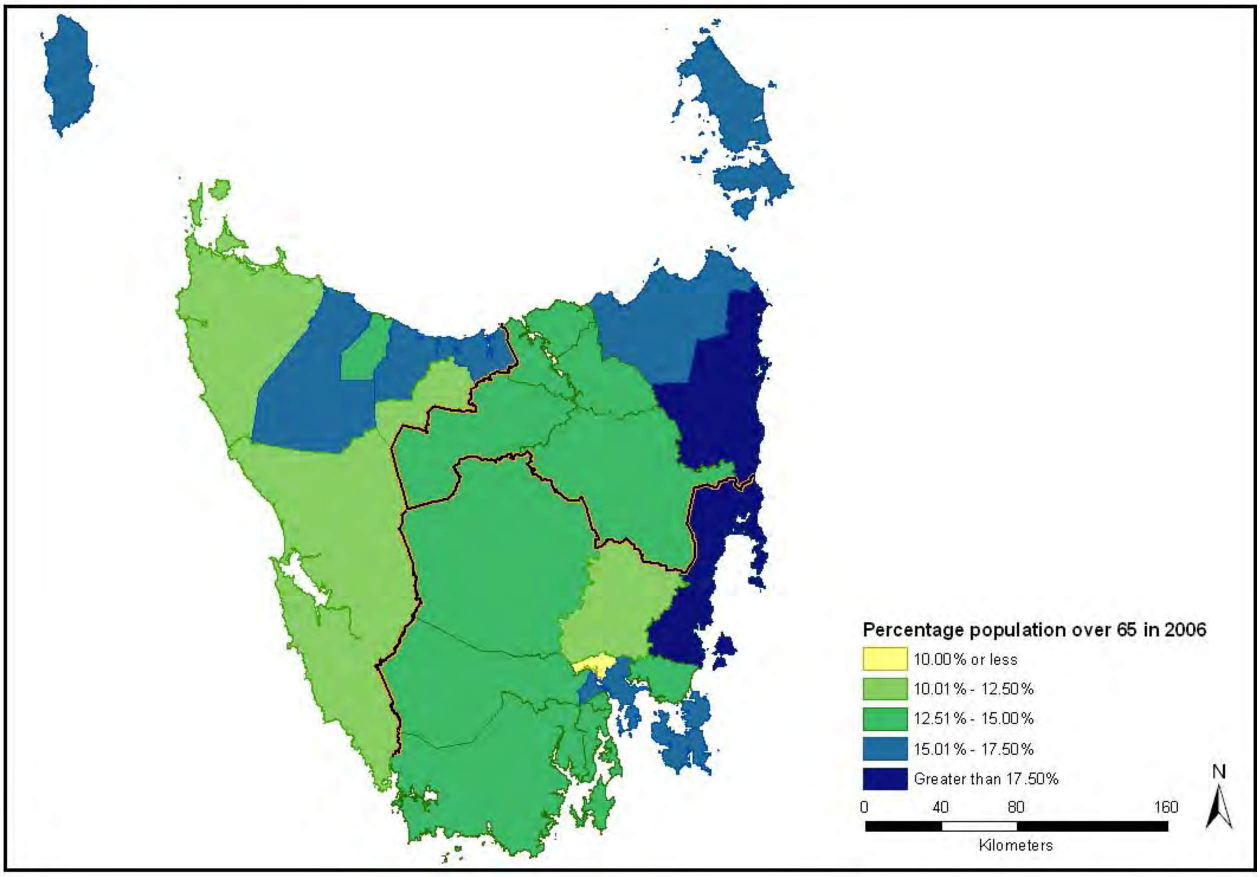

Figure 15: Population over 65 by LGA, 2006 *(Source: ABS Census)*

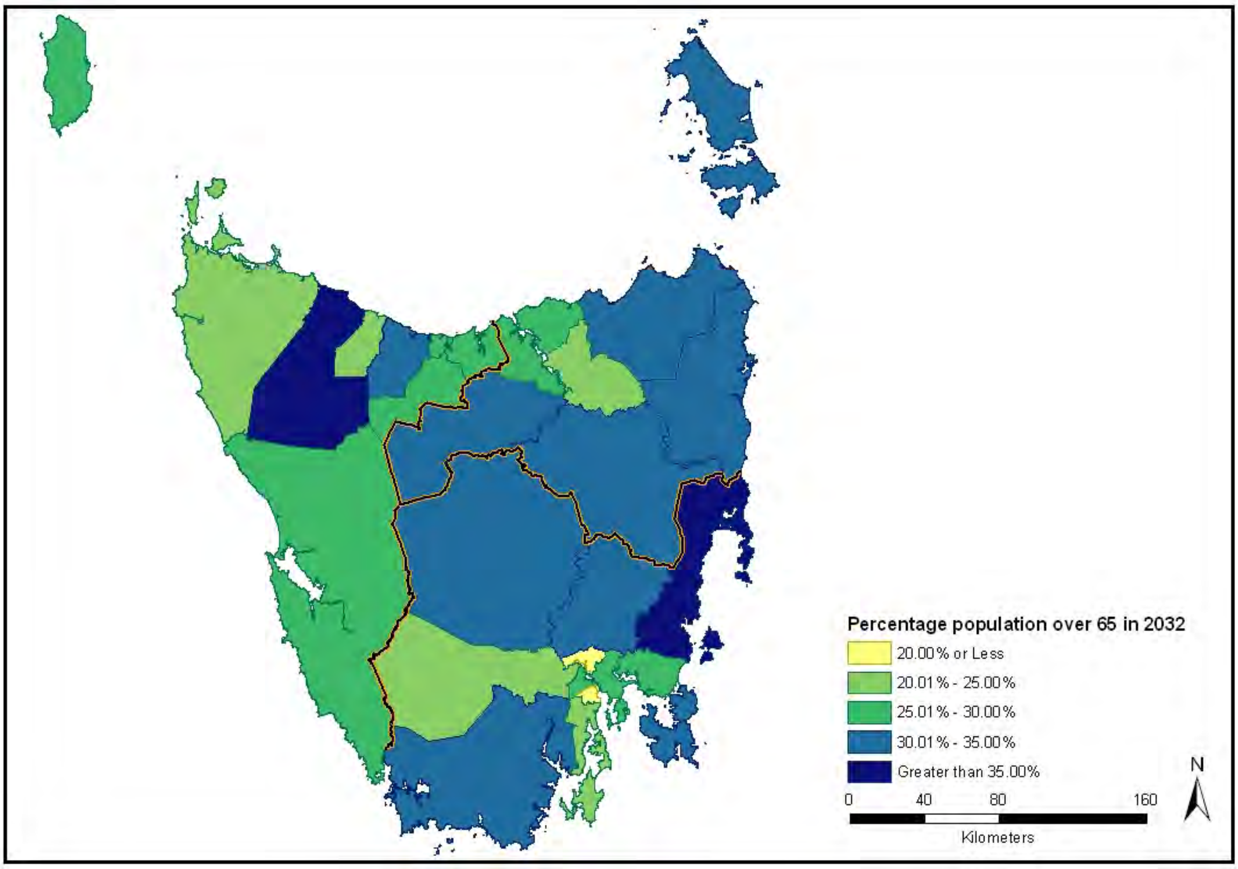

Figure 16: Population over 65 by LGA, 2032 *(Source: DCAC)*

Force of ageing is also a relevant consideration. Force of ageing measures the average percentage point increase per year in the population aged over 65 years. The higher the average yearly increase, the faster the population is ageing. According to the force of ageing figures for the region's LGAs, over the period 2006-2032 the inner city areas of Greater Hobart are projected to age the slowest while the outer rural LGAs, with the exception of Sorell and Derwent Valley, are projected to age the fastest (Figure 17). These figures correlate with the trend of families and younger people locating in urban areas closest to the main employment and education centres, with the sea and tree change relocation trends of people heading towards retirement.

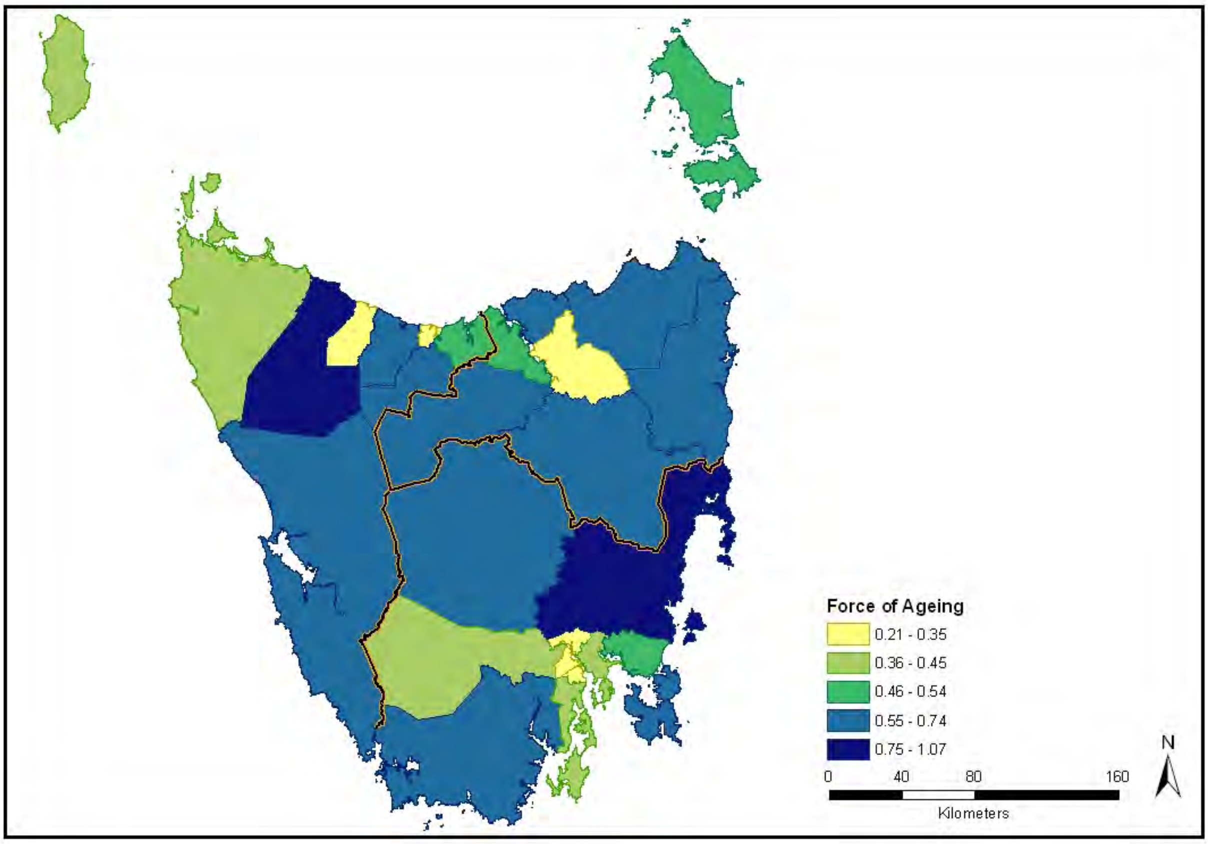

Figure 17: Force of Ageing by LGA *(Source: ABS Census and DCAC)*

3.6 Migration and Country of Origin

Immigrants form a very low percentage of the population in the region and the State, although more recently Tasmania has become a more attractive option for interstate migration. Along with Greater Launceston, Greater Hobart has the greatest numbers of overseas immigrants which is reflective of the employment and housing opportunities for migrants within these areas (Figure 18). This is reflective of the nation wide trend since the mid 1980s for overseas immigrant to settle in urban areas (Hugo 1999), although Tasmania is the State least affect by overseas immigrant settlement.

Tasmania does capture greater numbers of interstate migrants. The pattern of settlement of interstate migrants does differ considerably from that of overseas immigrants. The areas seeing the highest increases in interstate migrants are outside of the main urban areas. This supports the notion that interstate migrants are attracted to Tasmania as a lifestyle change, seeking rural and coastal based settlements where the ‘pace of life’ is more sedate than that associated with an urban lifestyle. Interstate migrants, particularly those who previously lived and worked in the large mainland cities, are less concerned with the travel distances from rural and coastal settlements to employment opportunities that are experienced in the Tasmanian context.

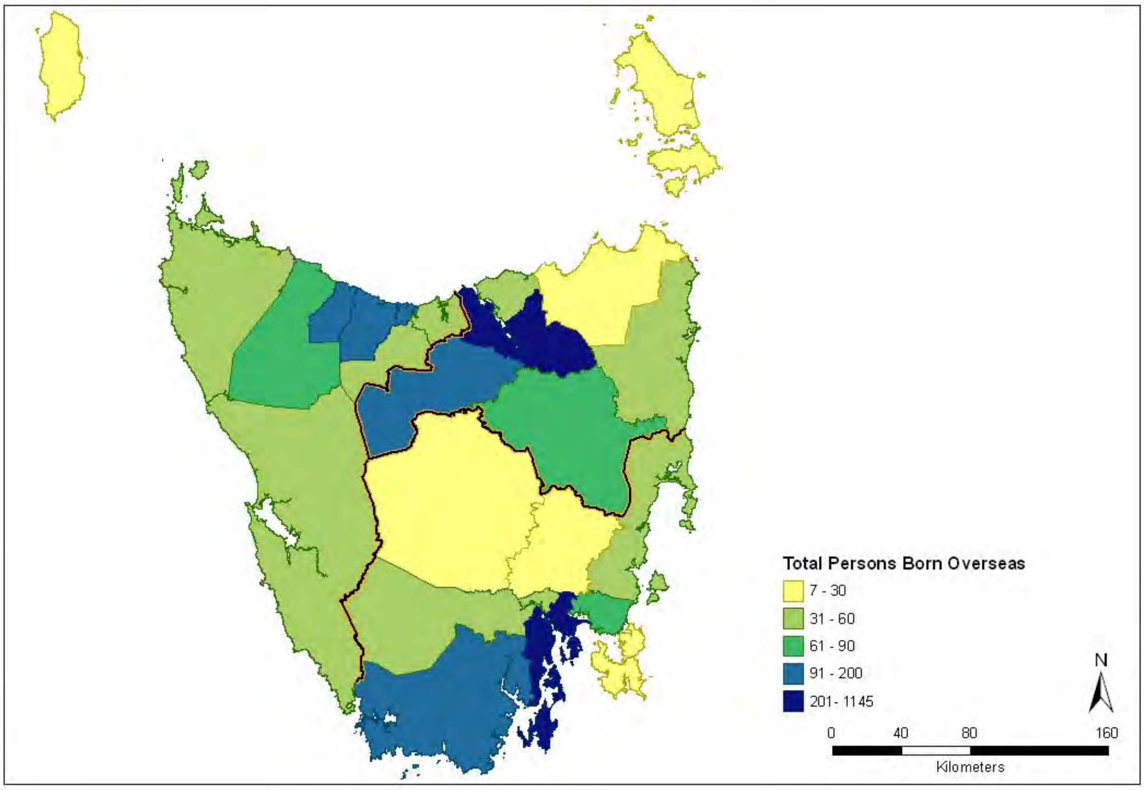

Figure 18: Total persons born overseas by LGA, 2006 *(Source: ABS Census)*

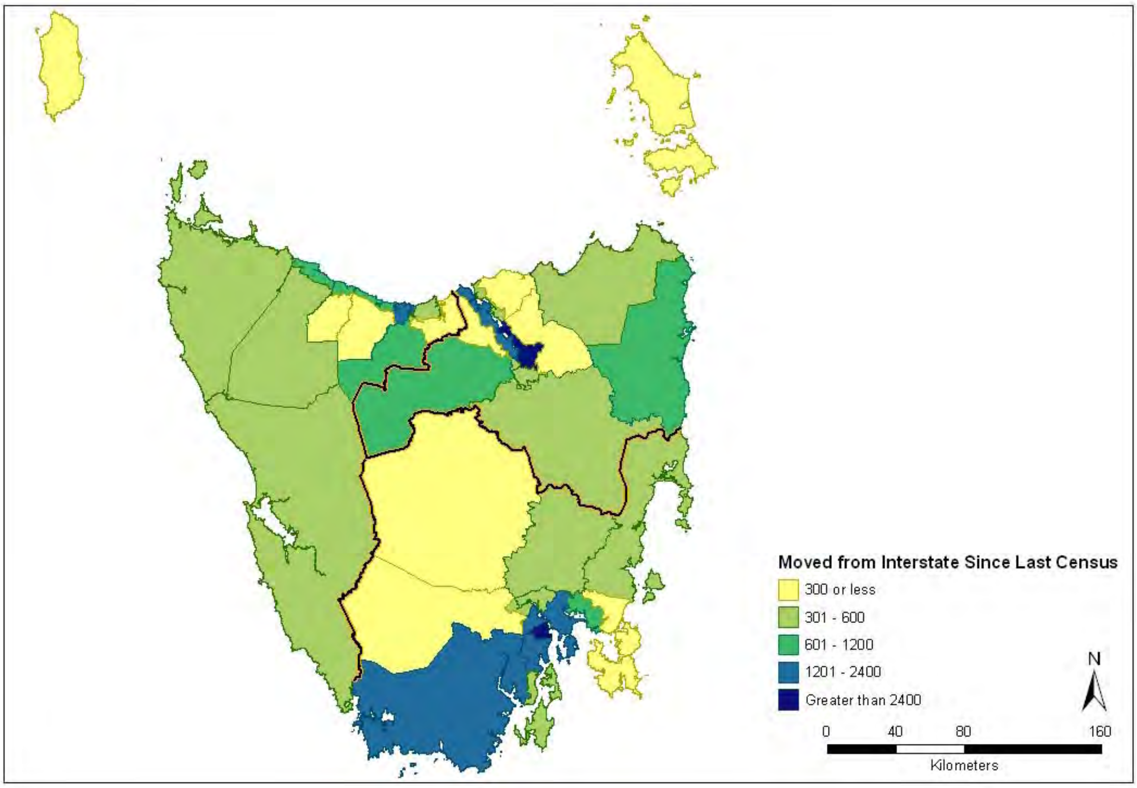

Figure 19: Total Persons moved from Interstate since last census *(Source: ABS Census)*

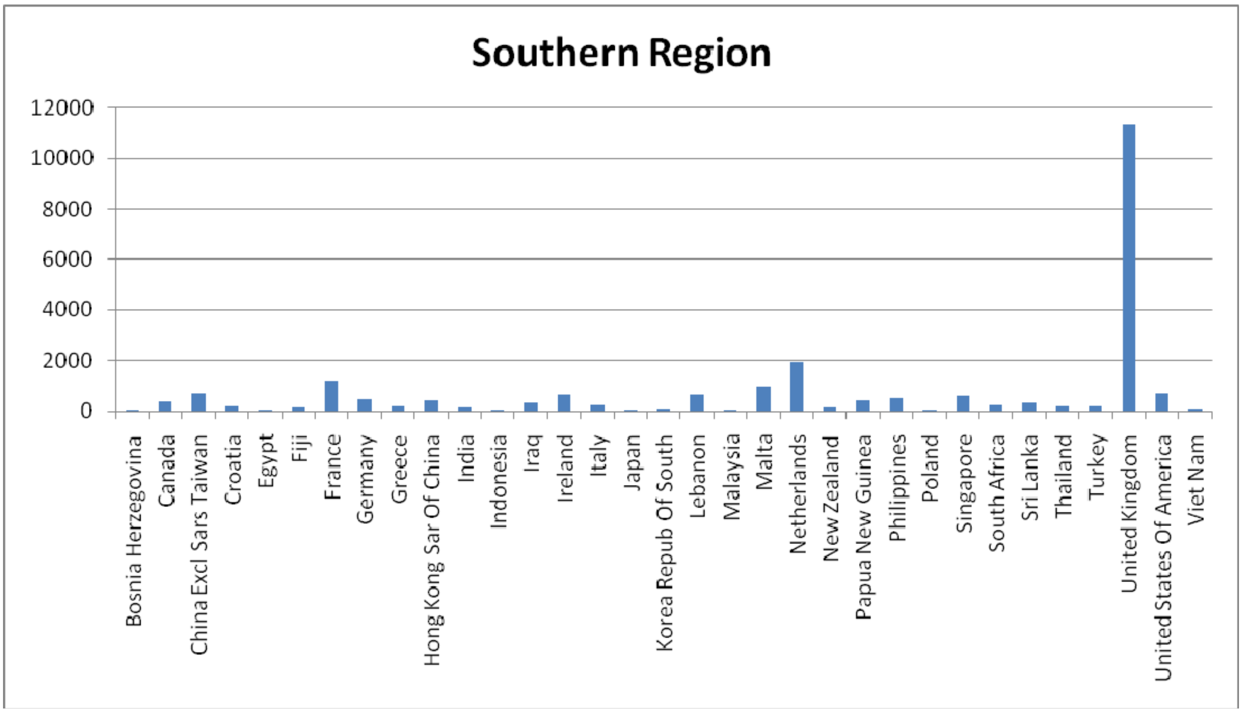

Figure 20: Country of Origin for Southern Tasmania, 2006 *(Source: ABS Census)*

In terms of country of origin, Figure 20 provides evidence that immigrants to Tasmania and the region are firstly from a predominantly English speaking background and secondly from European nations whose cultural and social characteristics are not dissimilar to the existing community. The highest proportions of overseas migrants are from the United Kingdom, followed by the Netherlands.

3.7 Household Size and Composition

Household sizes in the region are fairly consistent, with no individual LGAs significantly different from the regional trend. The average household size is 2.4 persons per dwelling. Household size is projected to decrease to 2.0 to 2.1 persons per dwelling over the next 20 years. The region has a relatively high proportion of smaller households with over 52% or 55,867 homes occupied by no more than two persons (see Table 4). These findings did not differ between the Southern Region and Greater Hobart areas.

Table 5: Household Size – Number of Persons Usually Resident, 2006 *(Source: ABS Census)*

	Number of persons usually resident						
	1	2	3	4	5	6 or more	Total
Brighton	806	1,548	316	858	364	189	4,681
Central Highlands	263	351	107	96	46	27	890
Clarence	4,627	6,626	2,999	2,801	1,039	452	18,544
Derwent Valley	795	1,217	564	532	217	108	3,433
Glamorgan Spring Bay	487	764	174	160	76	27	1,688
Glenorchy	5,568	5,864	2,636	2,156	851	401	17,476
Hobart	6,207	6,475	2,723	2,429	849	286	18,969
Huon Valley	1,170	1,943	735	722	345	200	5,155
Kingborough	2,432	4,017	1,784	1,971	742	303	11,249
Sorell	1,179	1,671	711	676	234	116	4,587
Southern Midlands	458	728	322	328	139	67	2,042
Tasman	278	393	124	90	28	14	927
Greater Hobart *	**20,474**	**25,592**	**10,991**	**10,700**	**4,024**	**1,710**	**74,091**
Southern Region	**24,270**	**31,597**	**13,795**	**12,819**	**4,930**	**2,190**	**89,601**
% Total	**27.1%**	**35.3%**	**15.4%**	**14.3%**	**5.5%**	**2.4%**	**100.0%**

* See Figure 1

The greatest concentration of smaller households of 1- 2 residents, is found in Hobart and Glenorchy (see Table 5). In particular, Hobart has over 74% of all households with no more than two residents. Clarence has a greater number of medium sized households and large households in the study area. In 2006, there were 5,800 medium sized households of 3- 4 residents accounting for 31% of total homes and a further 1,491 larger households in excess of five usual residents. Generally, smaller households represent 62% of all homes in the Southern Region with around 30% medium in size and 8% accommodating for larger numbers of residents.

Table 6: Small, Medium and Large Households by LGA, 2006 *(Source: ABS Census)*

	1-2 persons		3-4 persons		5+ persons	
	Number	% Total	Number	% Total	Number	% Total
Brighton	2,354	50.3%	1,774	37.9%	553	11.8%
Central Highlands	614	69.0%	203	22.8%	73	8.2%
Clarence	11,253	60.7%	5,800	31.3%	1,491	8.0%
Derwent Valley	2,012	58.6%	1,096	31.9%	325	9.5%
Glamorgan Spring Bay	1,251	74.1%	334	19.8%	103	6.1%
Glenorchy	11,432	65.4%	4,792	27.4%	1,252	7.2%
Hobart	12,682	66.9%	5,152	27.2%	1,135	6.0%
Huon Valley	3,113	60.9%	1,457	28.5%	545	10.7%
Kingborough A	5,730	56.1%	3,496	34.2%	987	9.7%
Kingborough B	722	69.5%	258	25%	58	5.5%
Sorell A	2,615	62.2%	1,277	30.3%	316	7.5%
Sorell B	234	61.6%	108	28.4%	38	10%
Southern Midlands	1,186	58.1%	650	31.8%	206	10.1%
Tasman	671	72.4%	214	23.1%	42	4.5%
Greater Hobart *	**46,066**	**62.2%**	**22,291**	**30.1%**	**5,734**	**7.7%**
Southern Region	**55,867**	**62.4%**	**26,614**	**29.7%**	**7,120**	**7.9%**

* see Figure 1

Over 60% of households in the region are family households (family households are defined as households with two or more people related by blood, marriage (including step-relations), adoption or fostering and who may or may not live together. Of those family households the predominant types are equally couple families with children (28%) and couple families with no children (26%). The other major household type within the region is lone person households. The regional composition in Southern Tasmania is similar to that of the Northern and North-West regions, although the North-West has marginally more family households.

At the LGA level, both Glamorgan Spring Bay and Tasman have the highest proportion of couples with no children. This is consistent with attraction of these areas to older retired or semi-retired generations, which is also reflected in these areas having the highest median age for the Southern Region, at 47 years. Brighton and Glenorchy have the highest proportion of households with children within the region. These two areas also have the highest percentage of single parent families. See Figure 22. As shown in Table 4, Brighton's residential population also has the lowest median age at 31 years.

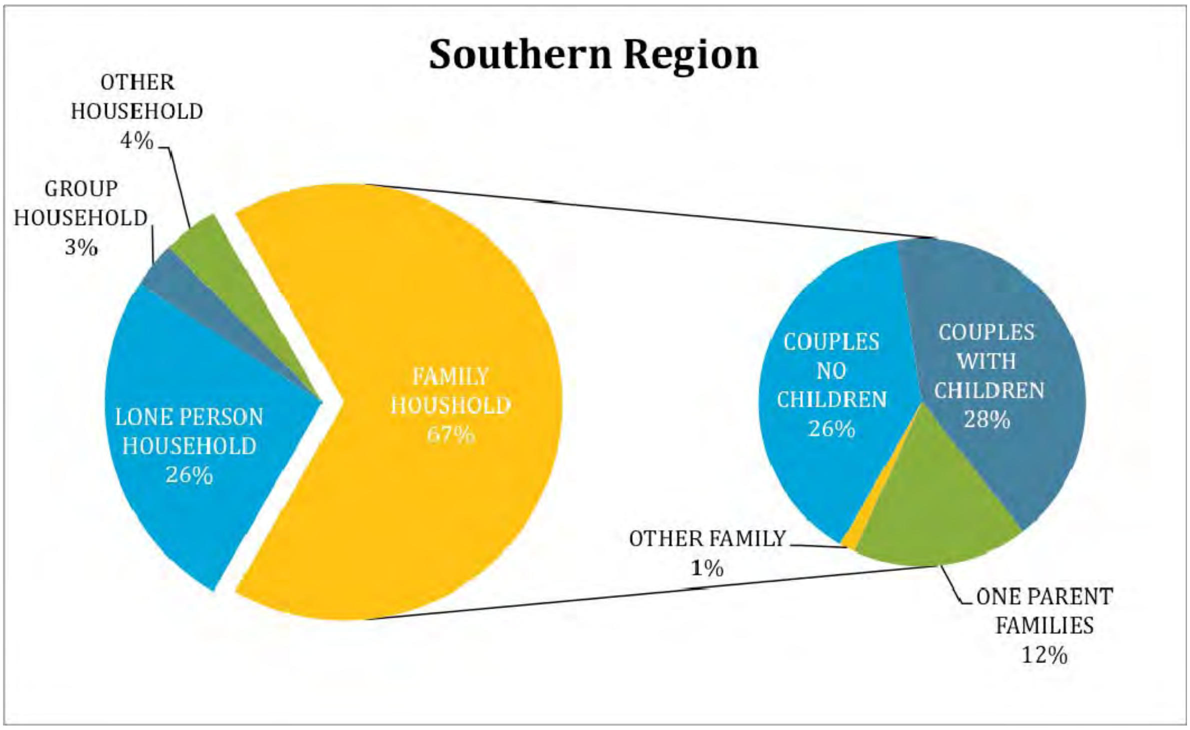

Figure 21: Household Family Type for Southern Tasmania Region, 2006 *(Source: ABS Census)*

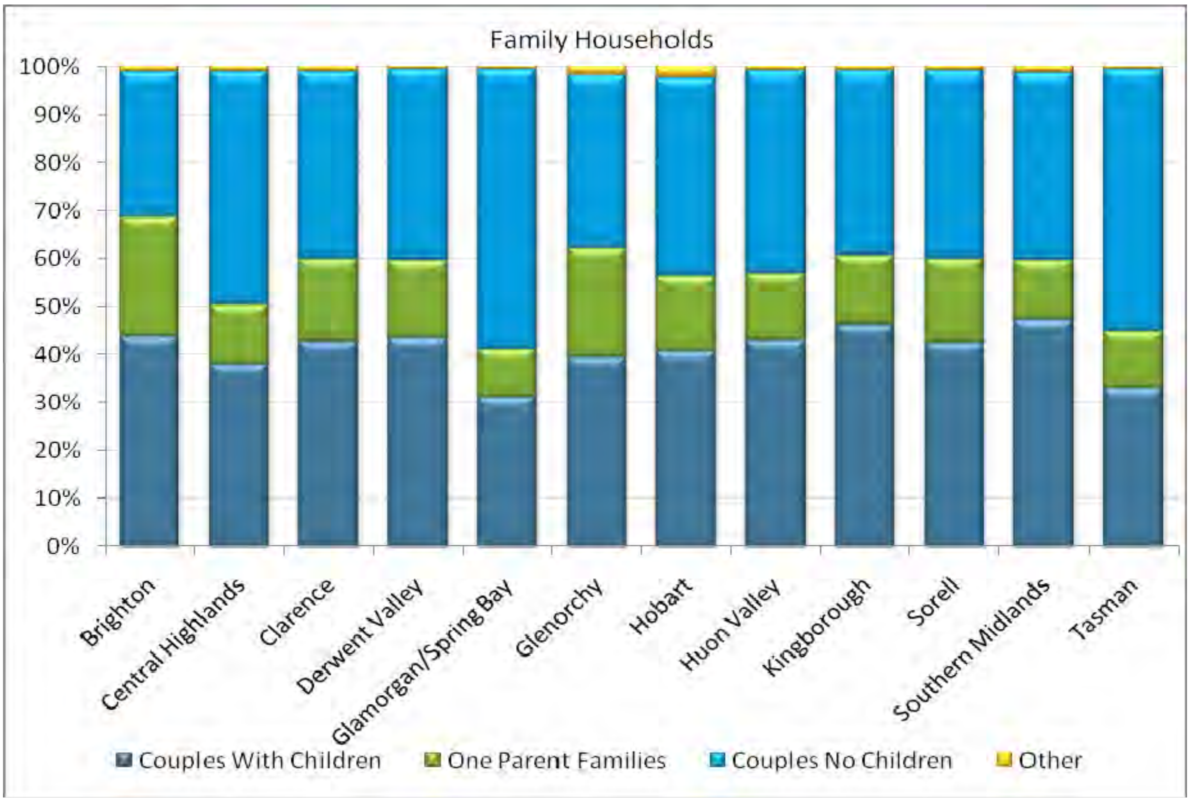

Figure 22: Household Family Breakdown by LGA, 2006 *(Source: ABS Census)*

As shown in Table 7, over the 25-year period from 1986 – 2006, there have been substantial changes in household type, with declining numbers of households comprising couple families with children (-10.4%) and substantially increased numbers of households comprising single parent families (39.3%), couples without children (30.1%) and lone person households (42.3%). Despite the changing nature of family and household composition, the total number of households in Southern Tasmania has increased 21.5% in the 25-year period from 1986-2006. These changes are primary considerations when determining future housing needs for the region's population as it highlights the need for a variety of housing options in terms of dwelling size, type affordability, accessibility, location and appropriateness.

Table 7: Changes in Household Type 1986-2006 *(Source: ABS Census)*

	1986	1991	1996	2001	2006	% Increase
Couple family with children	29,146	29,265	28,066	26,603	26,398	-10.4
Couple family without children	17,197	18,304	20,429	22,572	24,615	30.1
One parent family	6,657	8,050	9,002	10,498	10,969	39.3
Other family	972	821	861	863	940	-3.4
Multi-family household	980	434	484	429	814	20.4
Lone person household	13,992	16,850	20,998	23,532	24,268	42.3
Group household	2,659	2,822	3,146	2,855	3,229	17.7
Total households	**71,603**	**76,546**	**82,986**	**87,352**	**91,233**	**21.5**

3.8 Private Dwelling Characteristics

Each census provides an opportunity to identify how many private dwellings there are in a given statistical area. Private dwellings are divided into two groups.

An occupied private dwelling is defined as the premises occupied by a household on census night. An unoccupied private dwelling is a structure built specifically for living purposes and capable of being lived in, but unoccupied at the time of the census. Vacant houses, holiday houses, huts, cabins (other than seasonal worker's quarters) and houseboats are therefore counted as unoccupied dwellings; but vacant tents, garages and caravans (if not normally occupied) are not. While unoccupied dwellings include dwellings vacant because they have been newly completed, dwellings vacant for demolition or repair, dwellings to let and dwellings where the household was absent on census night, there are also a useful indicator of the presence of holiday homes.

Areas with high proportions of holiday homes, generally experience greater seasonal fluctuations in population which results in different characteristics for which to plan for (both in terms of community and infrastructure needs).

Table 8 outlines the number of dwellings in each SLA in the last three census periods and the changes to the number of occupied versus unoccupied dwellings. Table 8 confirms that Central Highlands, Glamorgan Spring Bay, Kingborough Pt B and Tasman SLAs are all popular holiday home locations with the consistently high proportions of unoccupied dwellings across all three census periods.

Interestingly of all SLAs the most noticeable change in the region over time between the ratio of occupied to unoccupied dwellings in an SLA is in Hobart Inner and Sorell Pt A. Hobart Inner has from 1996 to 2006 experienced an increase in unoccupied dwellings of over 13%. While Sorell Pt A has experienced the opposite effect with an increase in occupied dwellings at the expense of unoccupied.

When comparing this against population growth over the same period (Table 9 and Figure) the reason for these changes become apparent. Inner Hobart's increase in unoccupied dwellings is a result of a population decrease in the same period of time. Although caution should be exercised in the use of these figures as the unusually high population figure for 1996 could be a statistical anomaly. Furthermore there is no increased physical evidence of high vacancy rates in Hobart Inner across the same period of time.

The statistics for Sorell Pt A does however support the anecdotal evidence of the conversion of what were previously 'shack' type settlements into 'dormitory suburbs' in order to accommodate a growing population in Greater Hobart. This is most evidence in the Southern Beaches suburbs.

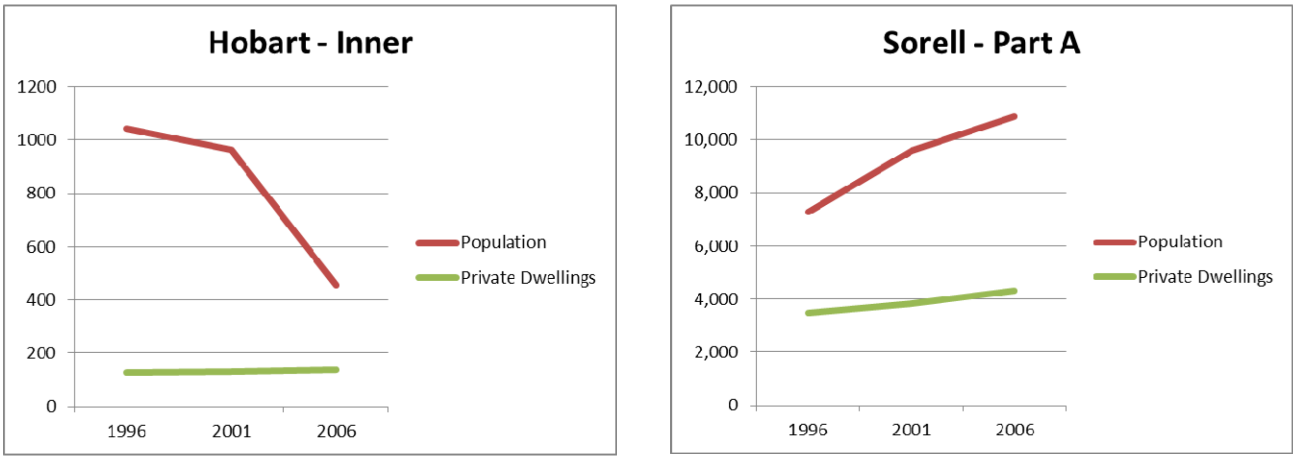

Figure 23: Comparison of population and number of private dwellings in Hobart Inner and Sorell Pt A Statistical Local Areas, 1996-2006 *(Source: ABS Census)*

Table 8: Number of Occupied and Unoccupied Private Dwellings by SLA 1996 to 2006 *(Source: ABS Census)*

	Total No. of Private Dwellings			No. Occupied			%Occupied			No. Unoccupied			%Unoccupied		
	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006
Brighton	4,274	4,592	5,087	4,057	4,348	4,911	94.9	94.7	96.5	217	244	176	5.1	5.3	3.5
Central Highlands	2,494	2,414	2,609	976	950	993	39.1	39.4	38.1	1,518	1,464	1,616	60.9	61.6	61.9
Clarence	19,246	19,850	20,737	17,724	18,448	19,205	92.1	92.9	92.6	1,522	1,402	1,532	7.9	7.1	7.4
Derwent Valley	3,673	3,757	3,904	3,339	3,390	3,564	90.9	90.2	91.3	334	367	340	9.1	9.8	8.7
Glamorgan Spring Bay	3,086	3,309	3,611	1,678	1,770	1,822	54.4	53.5	50.5	1,408	1,539	1,789	45.6	46.5	49.5
Glenorchy	18,510	18,871	19,297	17,302	17,705	18,096	93.5	93.8	93.8	1,208	1,166	1,201	6.5	6.2	6.2
Hobart Inner	146	160	188	129	132	140	88.4	82.5	74.5	17	28	48	11.6	17.5	25.5
Hobart Remainder	21,049	21,680	22,142	18,971	19,739	19,981	90.1	91	90.2	2,078	1,941	2,161	9.9	9	9.8
Huon Valley	5,835	6,047	6,498	4,713	4,930	5,285	80.8	81.5	81.3	1,122	1,117	1,213	19.2	18.5	18.7
Kingborough Pt A	9,389	10,148	11,238	8,760	9,494	10,488	93.3	93.6	93.3	629	654	750	6.7	6.4	6.7
Kingborough Pt B	1,473	1,755	1,881	905	1,044	1,116	61.4	59.5	59.3	568	711	765	38.6	40.5	40.7
Sorell Pt A	4,685	4,943	5,294	3,473	3,831	4,332	74.1	77.5	81.8	1,212	1,112	962	25.9	22.5	18.2
Sorell Pt B	482	485	502	349	369	392	72.4	76.1	78.1	133	116	110	27.6	23.9	21.9
Southern Midlands	2,257	2,341	2,378	1,975	2,076	2,130	87.5	88.7	89.6	282	265	248	12.5	11.3	10.4
Tasman	1,907	2,017	2,128	893	925	993	46.8	45.9	46.7	1,014	1,092	1,135	53.2	54.1	53.3
Greater Hobart*	**77,299**	**80,244**	**83,983**	**70,416**	**73,697**	**77,153**	**91.10%**	**91.84%**	**91.87%**	**6,883**	**6,547**	**6,830**	**8.90%**	**8.16%**	**8.13%**
Remainder of Region	**21,207**	**22,125**	**23,511**	**14,828**	**15,454**	**16,295**	**69.92%**	**69.85%**	**69.31%**	**6,379**	**6,671**	**7,216**	**34.03%**	**30.15%**	**30.69%**
Southern Region	**98,506**	**102,369**	**107,494**	**85,244**	**89,151**	**93,448**	**86.54%**	**87.09%**	**86.93%**	**13,262**	**13,218**	**14,046**	**14.26%**	**12.91%**	**13.07%**

* see figure 1

Table 9: Comparison between population and number of dwellings by SLA, 1996-2006 (Source: ABS Census)

	1996			2001			2006		
	Private Dwellings	Pop^n	No. of Dwellings per Person	Private Dwellings	Pop^n	No. of Dwellings per Person	Private Dwellings	Pop^n	No. of Dwellings per Person
Brighton	4,274	12,462	2.92	4,592	12,539	2.73	5,087	14,122	2.78
Central Highlands	2,494	2,539	1.02	2,414	2,350	0.97	2,609	2,241	0.86
Clarence	19,246	47,363	2.46	19,850	47,320	2.38	20,737	49,637	2.39
Derwent Valley	3,673	9,473	2.58	3,757	9,005	2.40	3,904	9482	2.43
Glamorgan Spring Bay	3,086	4,012	1.30	3,309	4,036	1.22	3,611	4,188	1.16
Glenorchy	18,510	43,002	2.32	18,871	42,445	2.25	19,297	43,413	2.25
Hobart Inner	146	1043	7.14	160	964	6.03	188	456	2.43
Hobart Remainder	21,049	45,329	2.15	21,680	45,658	2.11	22,142	47,247	2.13
Huon Valley	5,835	12,887	2.21	6,047	13,141	2.17	6,498	14,001	2.15
Kingborough Pt A	9,389	24,483	2.61	10,148	25,422	2.51	11,238	28,221	2.51
Kingborough Pt B	1,473	2,286	1.55	1,755	2,456	1.40	1,881	2,617	1.39
Sorell Pt A	4,685	7,286	1.56	4,943	9,584	1.94	5,294	10,894	2.06
Sorell Pt B	482	950	1.97	485	931	1.92	502	1,033	2.06
Southern Midlands	2,257	5,325	2.36	2,341	5,581	2.38	2,378	5,668	2.38
Tasman	1,907	2,239	1.17	2,017	2,250	1.12	2,128	2,238	1.05
Greater Hobart	**77,299**	**180,965**	**2.34**	**80,244**	**183,932**	**2.29**	**83,983**	**193,990**	**2.31**
Remainder of Region	**21,207**	**39,711**	**1.87**	**22,125**	**38,687**	**1.75**	**23,511**	**41,468**	**1.76**
Southern Region	**98,506**	**220,676**	**2.24**	**102,369**	**222,619**	**2.17**	**107,494**	**235458**	**2.19**

* see figure 1

3.1 Dwelling Characteristics

Southern Tasmania's residential building stock is classified into four categories: separate houses; semi-detached houses; flat, units & apartments; and other dwellings (i.e. caravans, tents, cabins etc). In the 10-year period from 1996 – 2006, there has been relatively little change in the proportions of each of these types of dwellings across the Southern Tasmania region. As shown in Table 10, separate houses are the primary dwelling type within the region, comprising approximately 85% of the total housing stock.

Table 10: Percentage of Dwelling Types - 1996-2006 *(ABS Census)*

	1996		2001		2006	
	Southern Tasmania	Greater Hobart	Southern Tasmania	Greater Hobart	Southern Tasmania	Greater Hobart
Separate	84.5%	82.9%	85.4%	83.3%	85%	82.4%
Semi-Detached	5.3%	6.1%	5.4%	6.3%	5.2%	6.2%
Flats etc.	9.2%	10.6%	8.4%	9.8%	9.1%	10.7%
Other	1.0%	0.5%	0.8%	0.6%	0.7%	0.7%

3.2 Household Income

Household income quintiles defined by the *Australian Bureau of Statistics* depict low to high income households by gross weekly income (based on national income distribution). Under this standard, those in the lowest quintile are households earning less than $499 gross weekly income. In contrast, high income households are those with a combined income exceeding $2,000 in weekly income.

Table 11 below shows the proportion of households by each income quintile within Southern Tasmania. This shows a relatively even spread of household wealth. The lowest quintile represents the highest proportion of households with around 25% of population falling in this cohort for both the Southern Region and Metro Hobart area. Generally, households in Metro Hobart have slightly higher incomes although both areas are similar in the distribution of wealth amongst the community.

Table 11: Weekly Household Income, 2006 *(Source: ABS Census)*

	Weekly Household Income Quintiles				
	<$499	$500-$799	$800-$1,199	$1,200-$1,999	$2,000 +
Brighton	26.5%	23.4%	22.9%	19.9%	7.2%
Central Highlands	35.9%	29.5%	20.3%	10.2%	4.1%
Clarence	21.9%	21.8%	21.0%	21.3%	13.9%
Derwent Valley	30.6%	22.9%	20.7%	18.6%	7.2%
Glamorgan Spring Bay	35.7%	24.7%	20.5%	14.0%	5.1%
Glenorchy	30.3%	24.3%	21.4%	17.3%	6.8%
Hobart	20.8%	18.7%	20.2%	19.8%	20.5%
Huon Valley	29.6%	25.8%	22.5%	15.5%	6.6%
Kingborough A	18.3%	19.4%	21.4%	24.5%	16.4%
Kingborough B	29.4%	24.9%	21.2%	16.7%	7.7%
Sorell A	26.8%	23.8%	23%	18.6%	7.7%
Sorell B	28.9%	28.1%	21.5%	15.2%	6.3%
Southern Midlands	28.7%	23.6%	22.6%	17.8%	7.25
Tasman	40.0%	28.8%	18.3%	9.4%	3.4%
Greater Hobart *	**24.1%**	**21.6%**	**21.1%**	**20.0%**	**13.1%**
Southern Region	**25.0%**	**22.1%**	**21.2%**	**19.4%**	**12.3%**

- see Figure 1

Households located on the periphery of the region show lower levels of weekly income (Figure 24). The LGAs of Tasman, Centrals Highlands, Glamorgan Spring Bay and Derwent Valley all have in excess of 30% of households in the lowest income quintile. In contrast, those areas central to the Southern Region account for the greater share of high income households. As shown above, Hobart, Kingborough and Clarence are the only LGAs with over 10% of households in the highest income cohort.

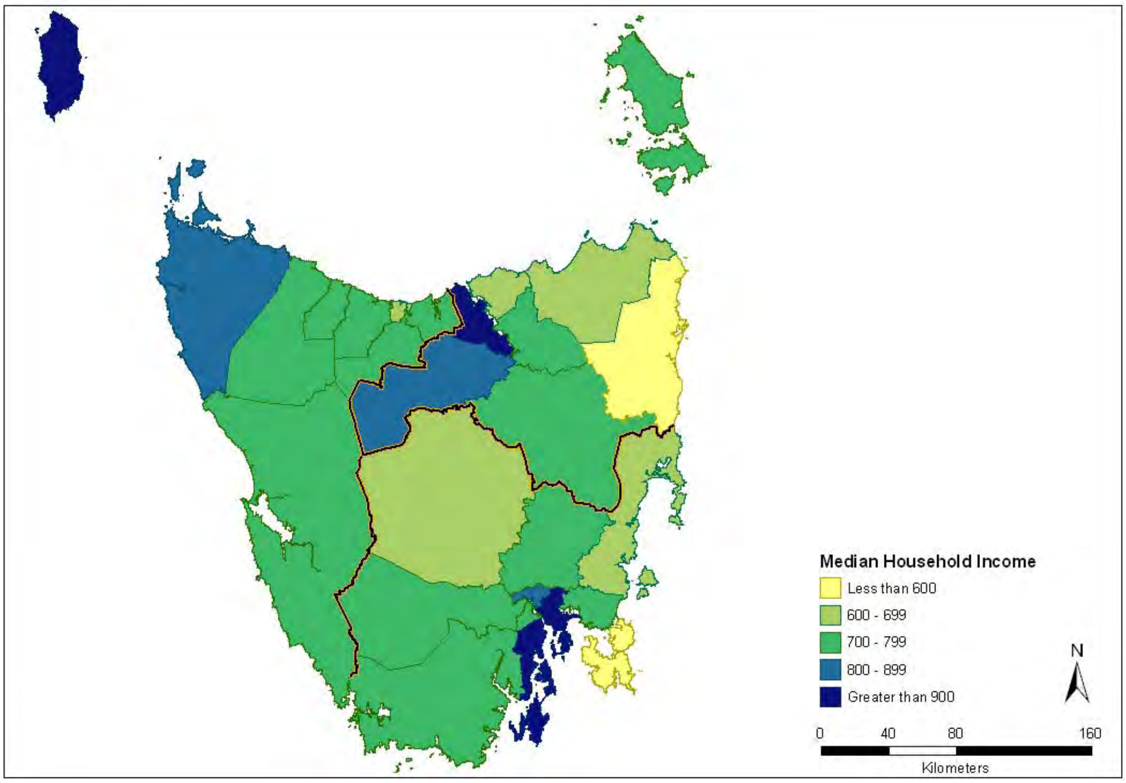

Figure 24: Median Household Income, 2006 *(Source: ABS Census)*

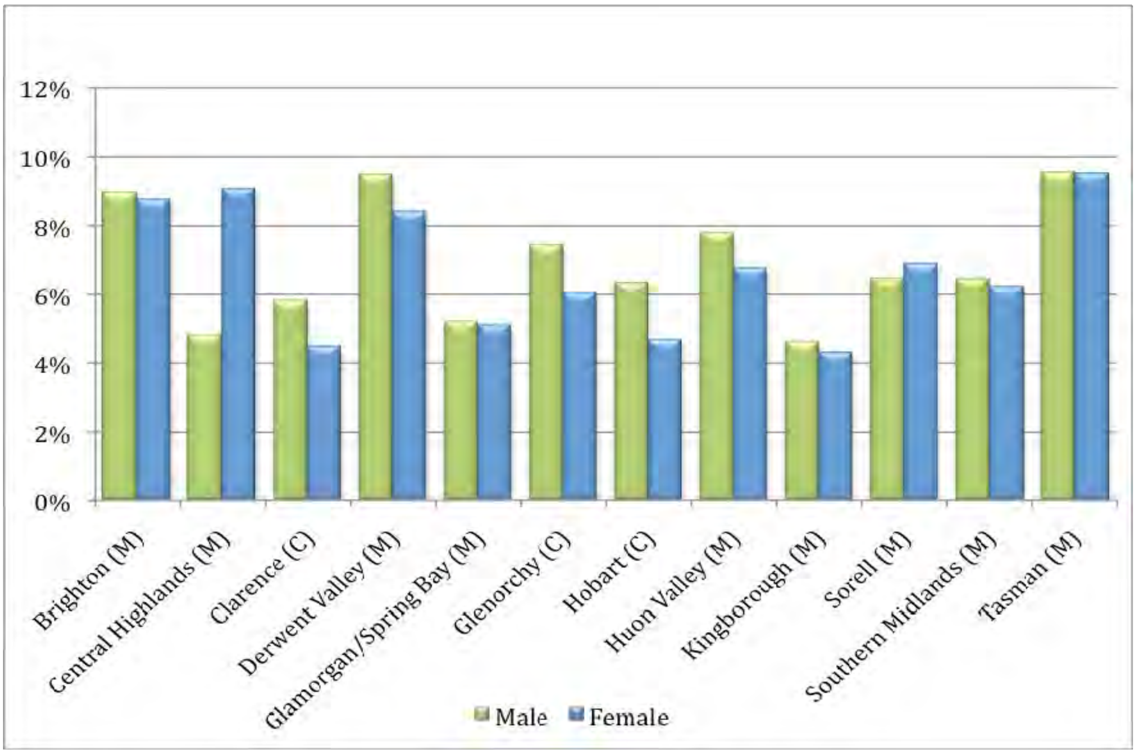

Figure 25: Unemployment rates for Southern Tasmania region by LGA, 2006 *(Source: ABS Census)*

3.3 Education

Tasmanian school retention rates are below the national average, although there are significant regional differences. As demonstrated by Figures 26, 27 and 28 below, students in both the Southern and Northern regions are more likely to complete Year 12 or equivalent than their peers in the North-West region. This likelihood further increases when examining students in the urban areas of Greater Hobart and Launceston as compared to rural areas. In August 2008, the apparent retention rate of full-time Tasmanian students from Year 7/8 to Year 12 was 64.8%, compared to 62.1% in 1998. The apparent retention rate for females in 2008 was 71.1% and 58.9% for males.

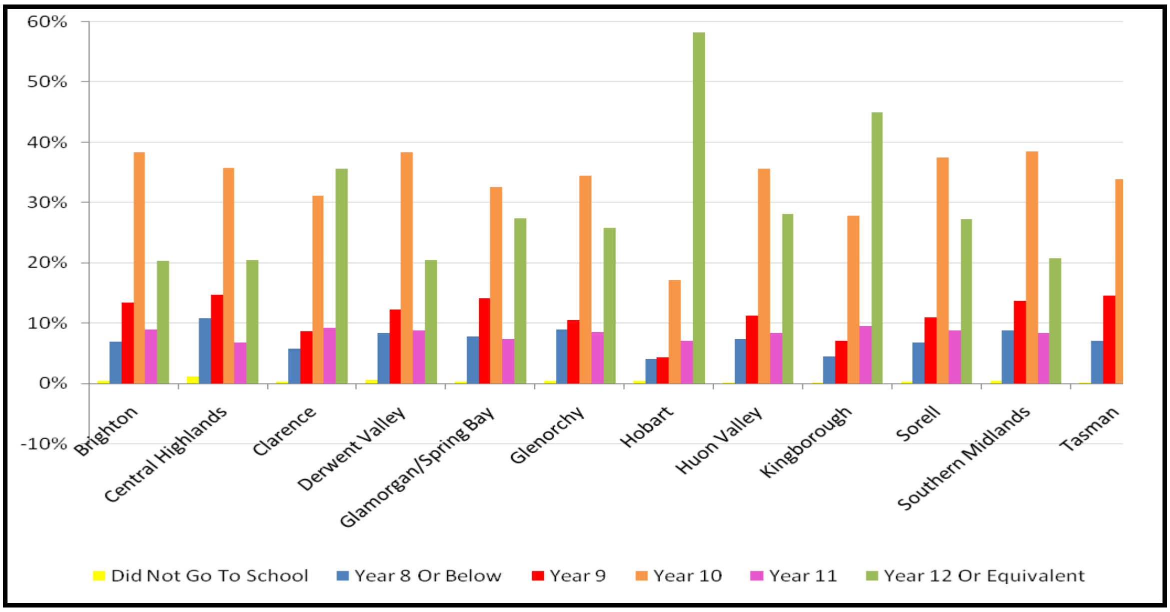

Figure 26: Southern Tasmania school retention rates, 2006 *(Source: ABS Census)*

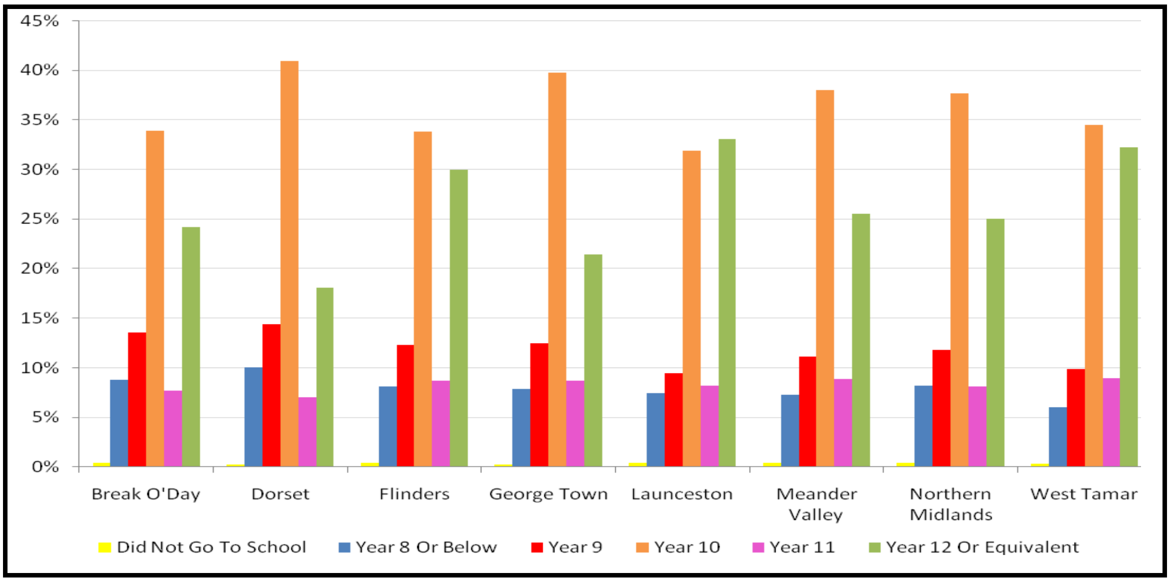

Figure 27: Northern Tasmania school retention rates, 2006 *(Source: ABS Census)*

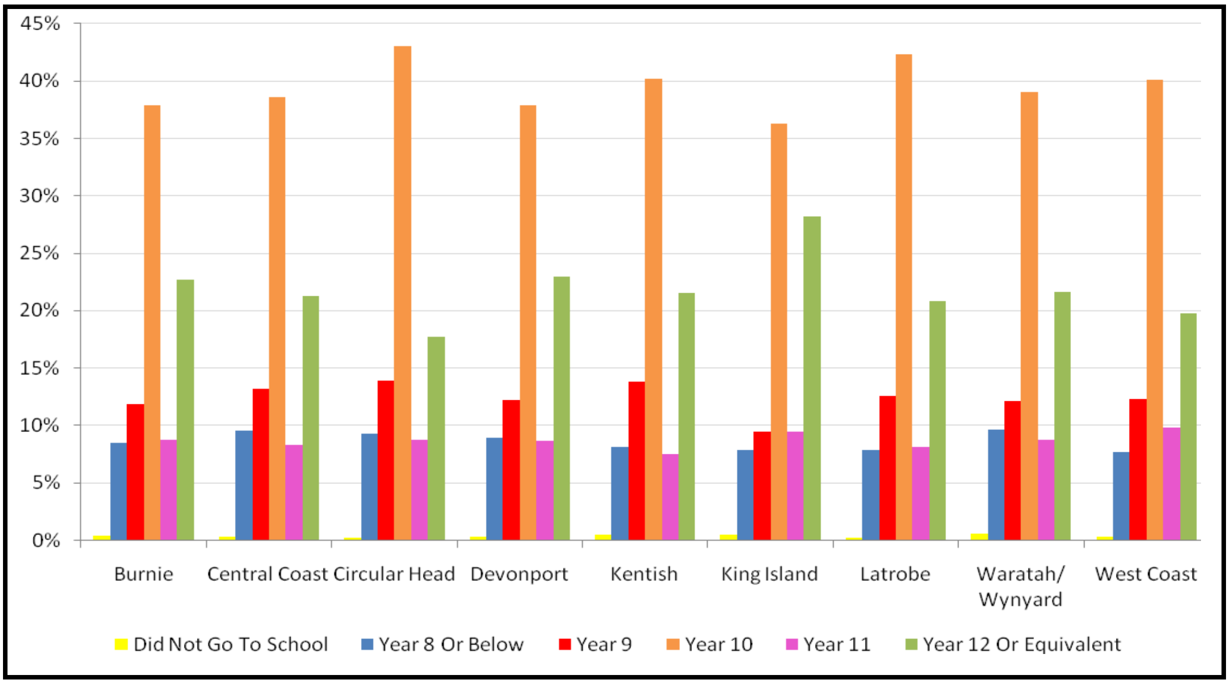

Figure 28: North West Tasmania school retention rates, 2006 *(Source: ABS Census)*

In terms of continued participation in education beyond the Year 12 level and on to tertiary education, the Tasmanian retention rates are also well below national averages.

In 2006, residents living within Southern Tasmania had completed higher levels of education than the rest of Tasmania, with 32% having completed year 12 compared to 27.2% Statewide. In addition, 12.2% of residents had completed a university qualification in 2006, while only 9.9% of residents Statewide had completed a university qualification.

The greatest proportions of students within the region were attending primary school, with the next greatest proportion of students attending secondary school.

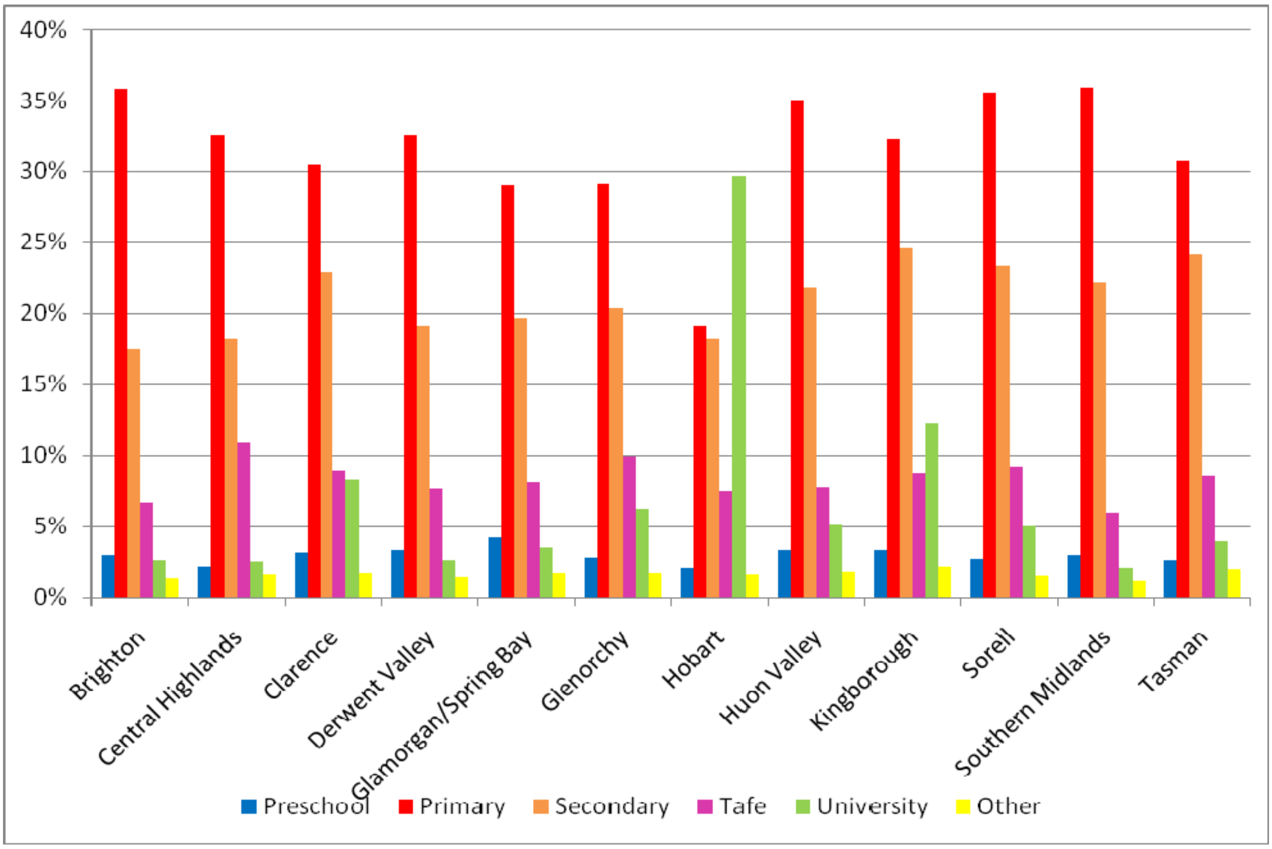

Figure 29: Type of educational institution attended by residents within Southern Tasmania region, 2006 *(Source: ABS Census)*

Of those who had completed formal school-based or non-school-based education, residents of Hobart had generally completed higher levels of education than in other LGAs within the region. Kingborough also has notably higher levels of education than other LGAs (Figure 30).

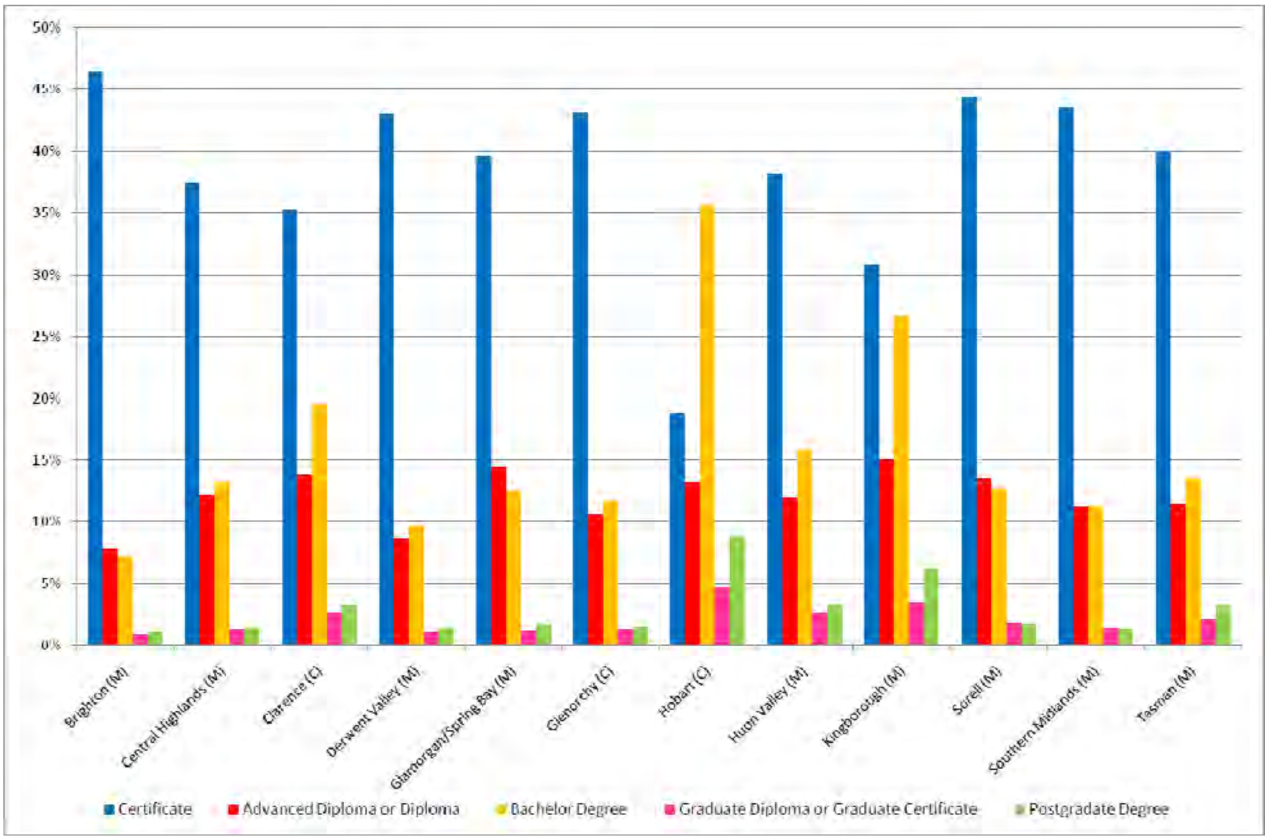

Figure 30: Highest level of school based education completed by residents within Southern Tasmania region, 2006 *(Source: ABS Census)*

3.4 Kinder Development Check

The Kindergarten Development Check (KDC) is designed to assist in the early identification of any Kindergarten student who is at risk of not achieving expected developmental outcomes and may require a specific intervention program and/or support from specific support personnel. A set of 21 identified critical core markers determines whether a student is deemed at risk of not achieving expected developmental outcomes.

In 2008, approximately 77 per cent of Kindergarten students met the necessary standards for numeracy, literacy and cognition against the Kindergarten Development Check (KDC) and 85 per cent of children in Prep were achieving expected literacy and numeracy outcomes (Department of Education 2008). There is evidence of locational differences in results as evident from Figure 31. These locational differences correlate with the locational difference in relative socio-economic disadvantage.

Figure 32 also shows the location of schools offering Launching in Learning programs which assist families with children aged 0 to 4 with the development of early years skills.

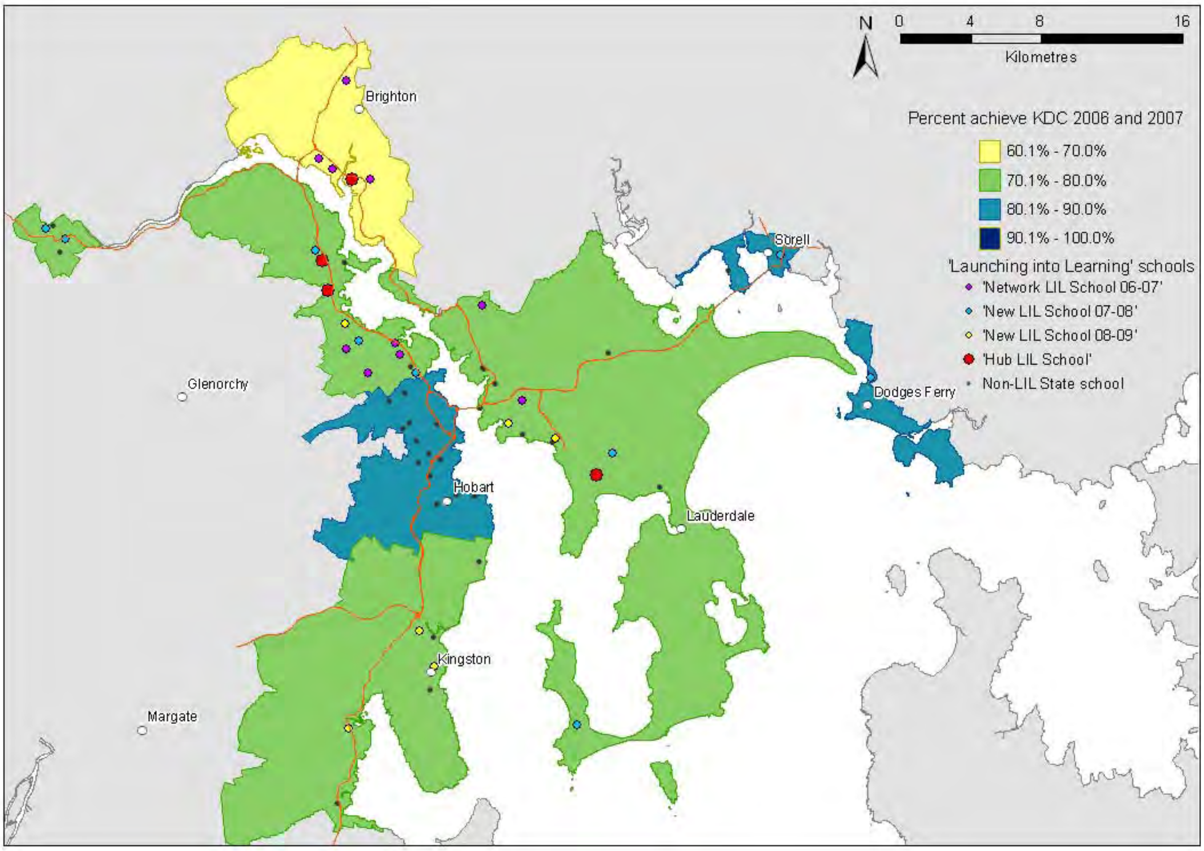

Figure 31: Kinder Development Check for Numeracy, Literacy and Cognition) at LGA Level
(Source: Department of Education 2008)

3.5 Internet Use

In 2006, Kingborough recorded the highest proportion of internet use of any LGA in the region, followed by Hobart then Clarence, compared to 2001 when Hobart had the highest proportion followed by Kingborough (Department of Infrastructure, Energy & Resources 2006). Central Highlands has the lowest proportion of internet use, followed by Tasman and Southern Midlands. These three municipalities also had the lowest level of broadband usage as would be expected given accessibility to broadband outside of urban areas.

The majority of people using the internet accessed it at home, followed by a combination of locations. Hobart residents were more likely to access the internet at work, while residents in rural municipalities such as Central Highlands, Southern Midlands, Derwent Valley and Tasman were more likely to access the internet from places other than work or home (for example a schools or community online access centre).

ABS data shows that people on low incomes, without tertiary education, living outside of urban areas or aged over 55 are less likely to use the internet. As internet use becomes more widespread, groups without access may experience fewer opportunities to participate in social, economic and political life. Improved internet access and access to the National Broadband Network may over the long term result in more people working from home, either in their own business or through remote server access to their place of employment. Improvements in internet access and speed will also affect some small business (i.e. music and video stores).

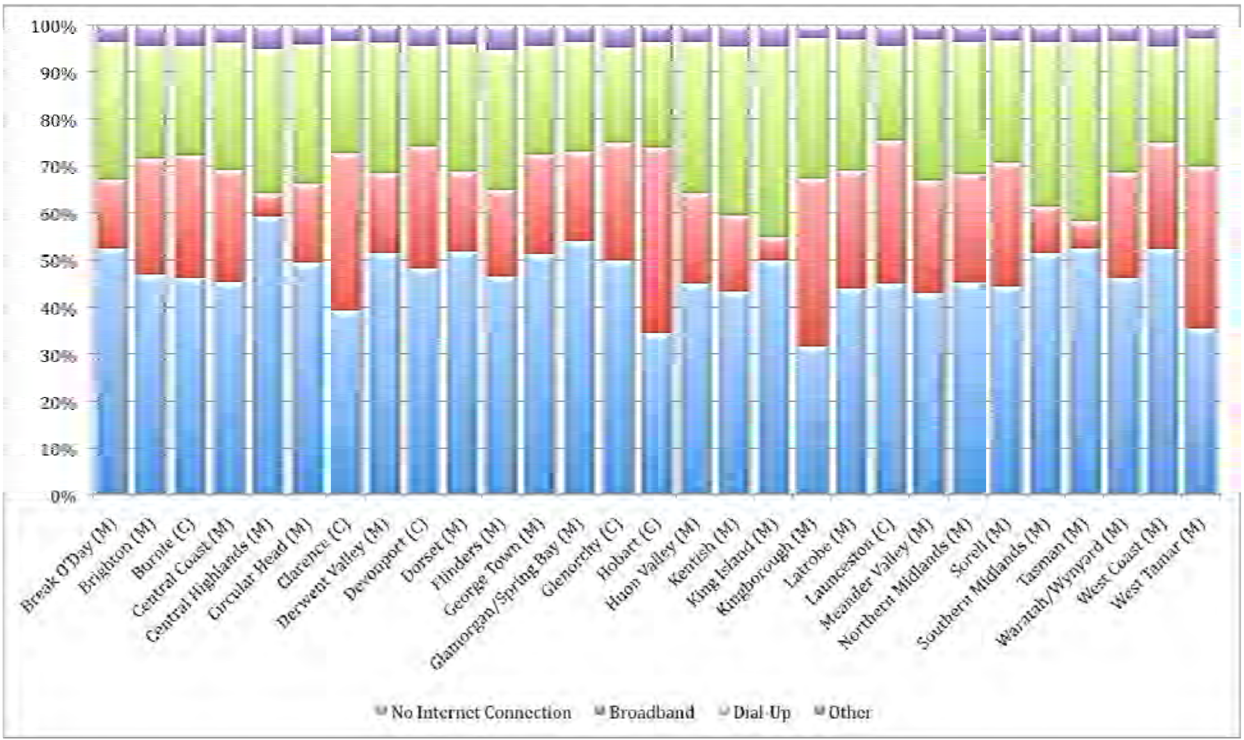

Figure 32: Household Internet Connection by LGA, 2006 *(Source: ABS Census)*

3.6 Labour Force and Employment

The 2006 the labour force participation rate was around 61% for the region which is consistent with national average of 60.7%. The unemployment rate during the same time was approximately 6%. This is less than the Tasmanian average of 6.6% but greater than the national average of 5.2%. Between Greater Hobart and the remainder of the region there are no significant differences in labour force data although Greater Hobart showed slightly lower unemployment and greater labour force participation (Table 12). This reflects the concentration of jobs provided in Greater Hobart.

Figure 33 shows that the full time labour force is still strongly predominated by males, although slightly higher numbers for females is evident in the urban areas. On the other hand females predominant in the part time labour force, suggesting that for families, women are still the primary care giver, working only part time to either supplement income for the household or to continue their role in the workplace.

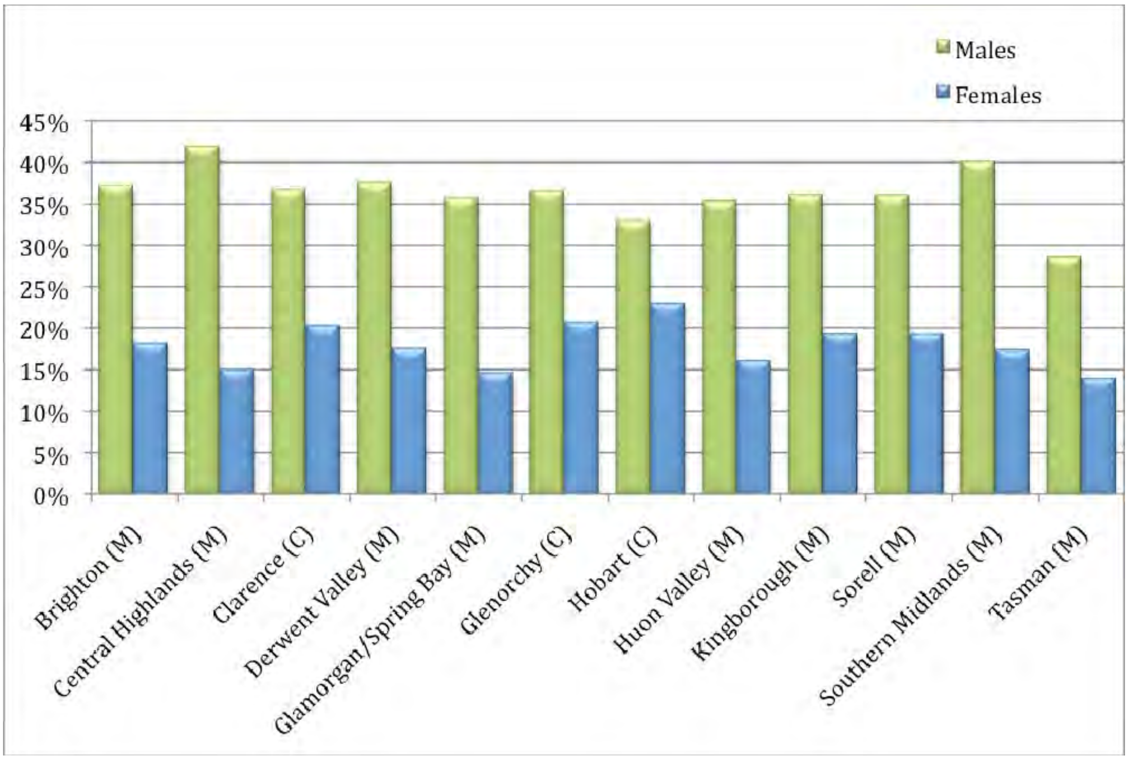

Figure 33: Male and Female full time employment labour force, 2006 *(Source: ABS Census)*

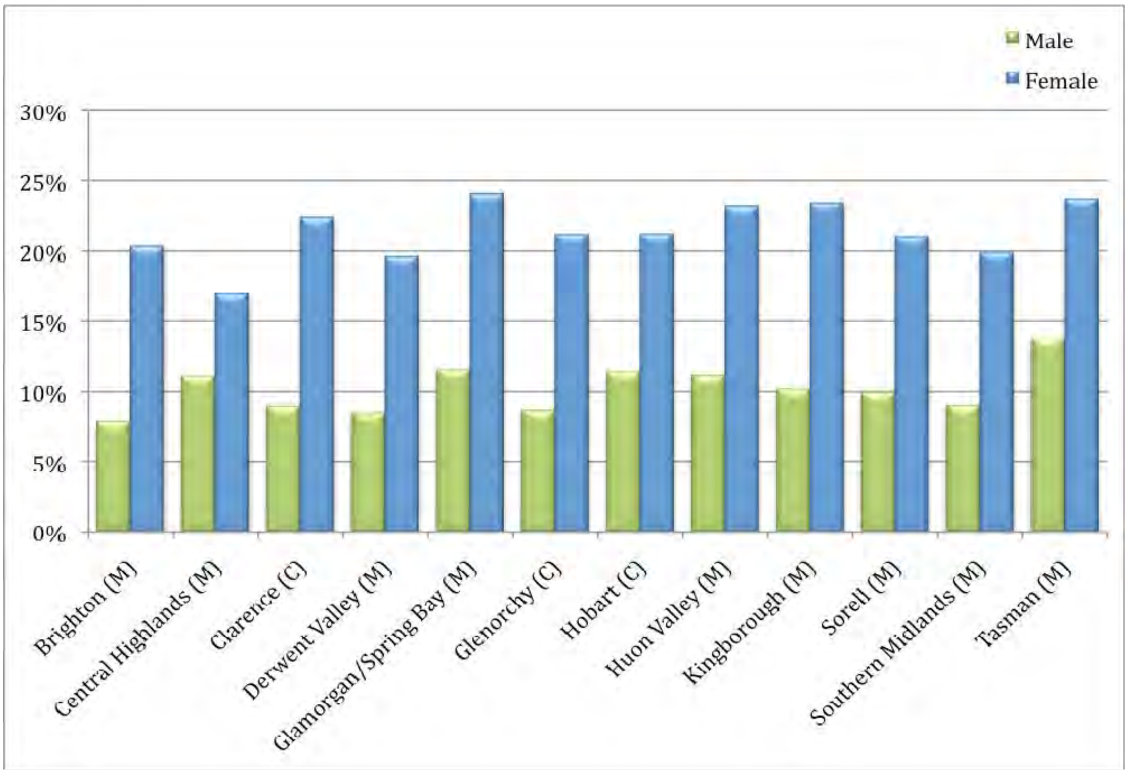

Figure 34: Male and Female part time employment labour force, 2006 *(Source: ABS Census)*

Table 12: Labour Force Statistics, 2006 *(Source: ABS Census)*

	Unemployed	Unemployment Rate %	Labour Force	Participation Rate %
Brighton	505	8.8%	5,711	60.2%
Central Highlands	60	6.6%	913	53.3%
Clarence	1,217	5.2%	23,462	61.3%
Derwent Valley	355	9.0%	3,951	56.3%
Glamorgan Spring Bay	96	5.3%	1,813	55.1%
Glenorchy	1,302	6.8%	19,235	58.6%
Hobart	1,386	5.5%	25,161	65.8%
Huon Valley	433	7.3%	5,912	57.0%
Kingborough A	605	4.3%	13,940	65.1%
Kingborough B	78	6.6%	1,185	57.0%
Sorell A	337	6.6%	5,102	61.9%
Sorell B	31	6.6%	469	60.6%
Southern Midlands	162	6.4%	2,535	60.7%
Tasman	92	10.1%	907	51.7%
Greater Hobart *	**5,352**	**6.2%**	**92,611**	**62.2%**
Southern Region	**6,657**	**6.0%**	**110,291**	**61.4%**

* see Figure 1

Unemployment in the larger LGAs of Hobart, Clarence and Kingborough were all below the regional average with Glenorchy the only major LGA with above average unemployment. Participation rates were also higher in the more populous areas although Glenorchy was again the only exception with a participation rate below 60%. Generally the proportions of males to females unemployed in each area is similar although in Central Highland nearly double the amount of females to males are in search of employment. This may suggest that traditional employment opportunities for females are limited in that area.

Over the 25-year period 1986 – 2006, the labour force participation rate has remained relatively stable with rates in 1986 at 61.4% and in 2006 at 60.5%. Within the ten-year period 1991-2001, a slight decrease of approximately 4% occurred (57.3% in 1991) but was recovered in 2001 with a recorded rate of 61.5%. This decrease is consistent with Tasmania's broader economic trends associated with the 1990-1991 recession. Unemployment rates over the 1986-2006 period have experienced some variation with a high of 15.2% experienced in 1991, which decreased to 10.8% by 2001 and 6% in 2006. In 2009, the unemployment rate for Southern Tasmania was estimated at 7.15%, although this average is comprised of unemployment rates of 4.2% in the metropolitan area and 10.1% in the non-metropolitan areas of the region. Again, this reflects the concentration of jobs provided in Greater Hobart. Table 8 details labour force participation rates and unemployment rates for Southern Tasmania SLAs for the 25-year period 1986-2006.

In 2006, Tasman, Derwent Valley and Brighton LGAs had the highest unemployment rates of 10.1%, 9.0% and 8.8% respectively. Despite Tasman holding the highest unemployment rate, it has decreased substantially since 1991 where it was recorded at 18.6%. Brighton's unemployment rate has also experienced a significant decline since 1991 where the unemployment rate of 29.2% was the highest recorded for the whole Southern Tasmania region since 1986.

Table 13: **Labour Force Statistics, 1986-2006** *(Source: ABS Census)*

	1986		1991		1996		2001		2006	
	U.R %	P.R %	U.R %	P.R %	U.R %	P.R %	U.R %	P.R %	U.R %	P.R %
Brighton	24.6	58.3	29.2	60.7	18.9	58.2	16.3	56.7	8.8	60.2
Central Highlands	8.4	62.8	13.7	63.1	10.4	58.6	1.7	57.5	6.6	53.3
Clarence	8.8	61.2	11.0	61.9	8.7	60.5	8.6	59.8	5.2	61.3
Derwent Valley	11.0	62.6	17.1	61.8	12.9	57.2	14.1	55.6	9.0	56.3
Glamorgan Spring Bay	10.4	58.1	15.6	58.6	12.0	55.2	11.0	53.6	5.3	55.1
Glenorchy	9.0	59.4	12.5	59.9	11.0	57.2	11.4	56.1	6.8	58.6
Hobart	8.0	58.8	10.9	60.1	8.6	61.5	7.8	56.2	5.5	65.8
Huon Valley	12.9	58.9	16.7	60.3	12.8	57.4	10.9	57.0	7.3	57
Kingborough A	6.2	64.2	8.3	64.4	6.5	63.9	6.3	63.7	4.3	65.1
Kingborough B	15.1	58.7	15.8	60.7	12.5	59.8	9.9	56.1	6.6	57.0
Sorell A	10.1	61.3	12.4	63.4	11.7	61.7	9.8	59.6	6.6	61.9
Sorell B	13.7	60.5	17.5	63.5	12.5	57.6	11.5	58.9	6.6	60.6
Southern Midlands	12.3	62.5	13.1	62.3	11.1	60.1	10.8	58.7	6.4	60.7
Tasman	14.5	59.4	18.6	60.1	14.5	55.5	11.7	52.8	10.1	51.7
Greater Hobart *	**11.1**	**60.5**	**12.4**	**51.7**	**10.9**	**60.5**	**10.0**	**58.7**	**6.2**	**62.2**
Southern Region	**11.8**	**60.5**	**15.2**	**61.5**	**11.7**	**58.9**	**10.8**	**57.3**	**6.0**	**61.4**

* see Figure 1

3.6.1 Index of Relative Socio-Economic Disadvantage

The concept of socio-economic disadvantage is not well defined or simple to analyse. The ABS has development a range of Social Economic Indexes for Areas (SEIFA) which provides a geographic analysis of the relative socio-disadvantage of communities in terms of their access to material and social resources and their ability to participate in society.

The Index of Relative Socio-Economic Disadvantage is one of the four SEIFA that the ABS has development and is derived from Census variables related to disadvantage, such as low income, low educational attainment, unemployment, and dwellings without motor vehicles.

It is important to note that the index represents only an average of people living in a defined area (in this instance at a suburb level). It does not represent the individual situation of each person living in that suburb. Larger suburbs are likely to have greater diversity of people and households.

The index is however useful in assisting to identify areas where access to services may be deficient.

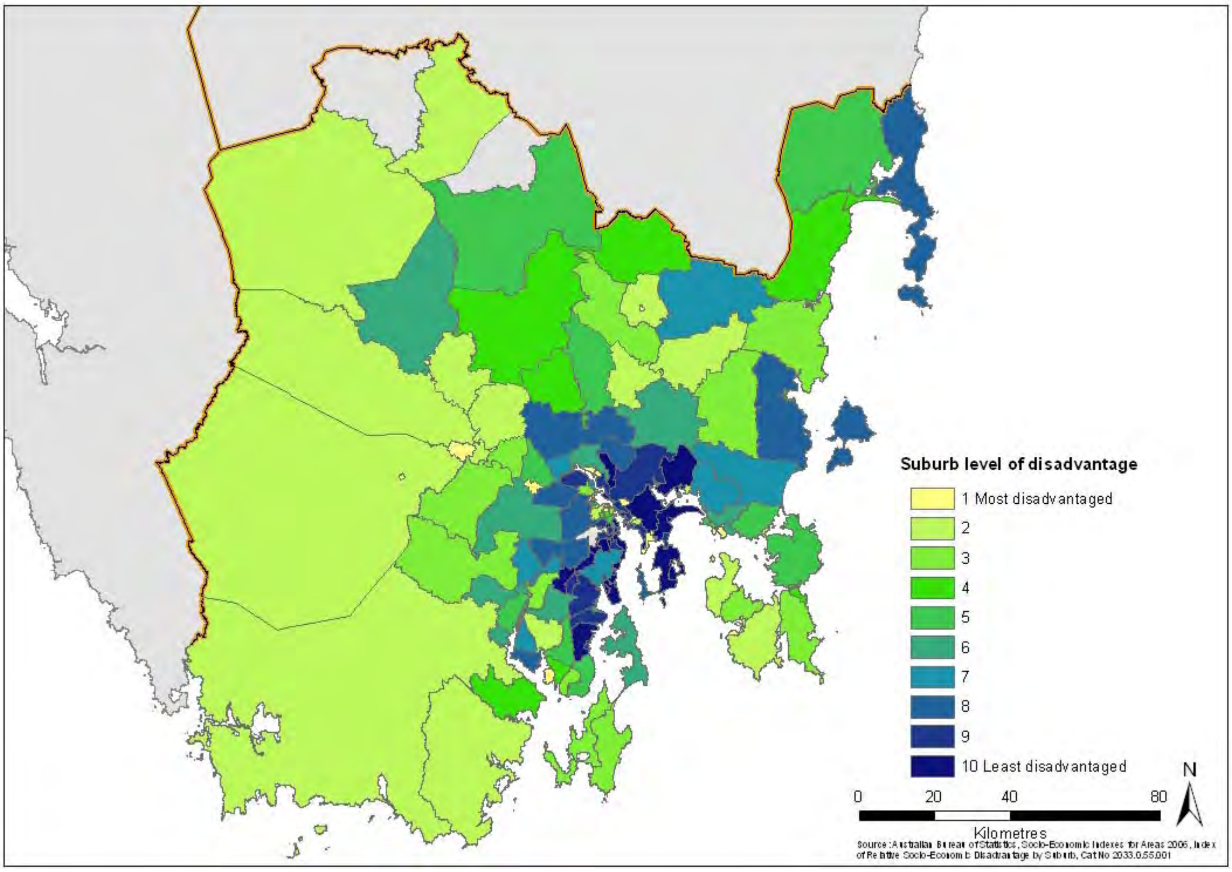

Figure 35: Index of Relative Socio-Economic Disadvantage for Southern Tasmania by SSC, 2006 *(Source: ABS Census)*

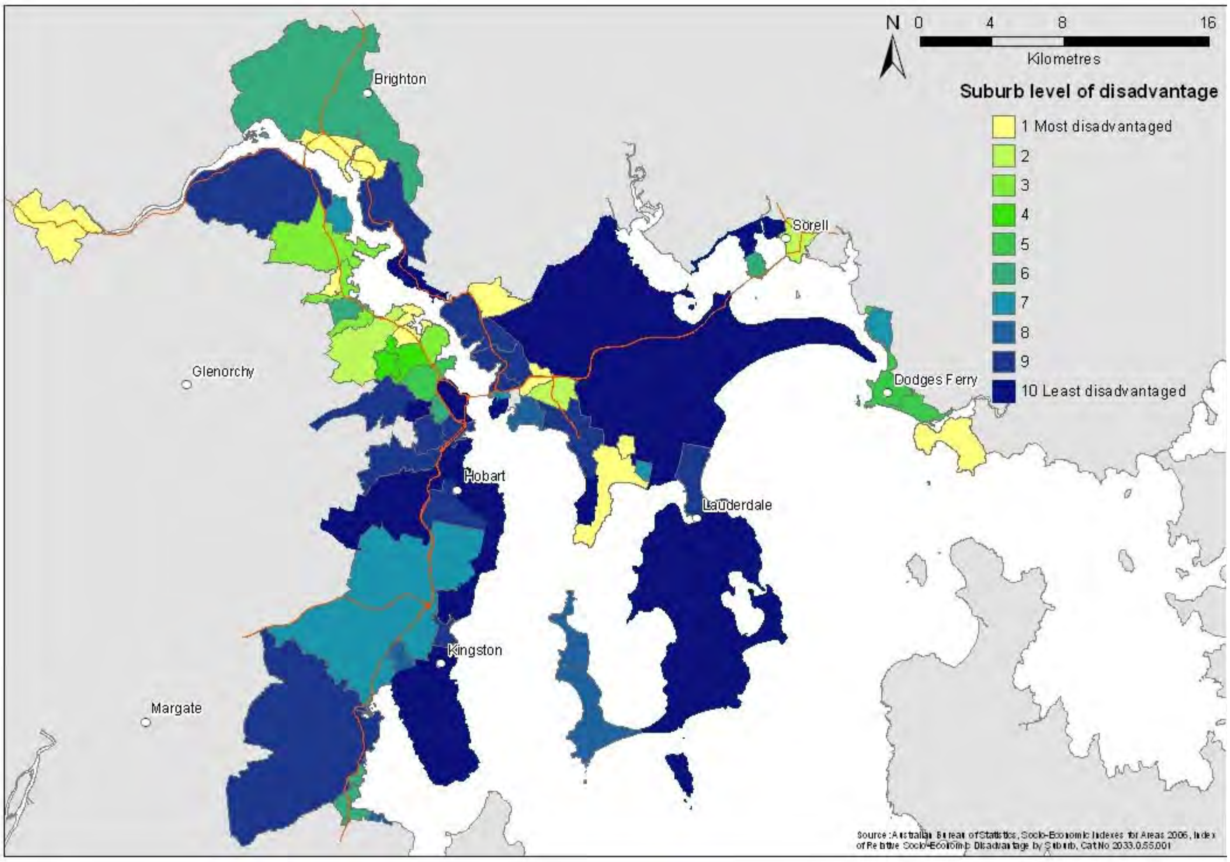

Figure 36: Index of Relative Socio-Economic Disadvantage for Greater Hobart by SSC, 2006 *(Source: ABS Census)*

3.7 Summary by Local Government Area

Table 14 and Table 15 summarises the key economic and social characteristics of the seven outer areas and five inner areas of Southern Tasmanian LGAs respectively. The LGAs have been divided in this fashion to compare the observable trend differences between LGAs that are closer to the major activity centre of Hobart (inner area) and those that are relatively more remote (outer area). A comparative measure of low, medium or high is provided for each statistic in order to guide this comparison.

The summary indicates that there are significant differences between the inner and outer LGAs (see Table 16). Outer areas predominantly have a lower population and median income (wealth), lower forecasts of population growth, and an older population. They are also characterised by a relatively lower participation rate, and higher unemployment rate, potentially as a result of reduced employment opportunities and access to work opportunities. Conversely, inner areas have a higher population, population growth forecast, median income and participation rate. Residents are generally younger and rates of unemployment relatively lower.

Within the inner areas, Hobart and Kingborough have the more affluent social economic profile. In particular, in comparison to 2001 and 1996, Kingborough has become notably more affluent.

The trend differences between inner and outer areas are reflective of the influence of proximity to higher order activity centres. Activity centres are hubs for employment, driving higher wealth and lower unemployment outcomes, while attracting new residents through the convenience of employment and retail access. Furthermore, the population attracted to the inner areas is often of a working age, driving down the average age of the inner areas.

Table 14: Outer Area, Economic and Social Characteristic Summary

	Pop. Base	Forecast Pop. Growth*	Age	Wealth	Participation Rate	Un-employment	Education % with tertiary qualification
Central Highlands	2,339 (Low)	47 (Low)	43 (High)	$615 (Low)	53.3% (Low)	6.6% (Med)	28% (Med)
Derwent Valley	9,920 (Low)	1,305 (Low)	38 (Med)	$728 (Med)	56.3% (Low)	9.0% (High)	22% (Low)
Glamorgan Spring Bay	4.464 (Low)	979 (Low)	47 (High)	$632 (Low)	55.1% (Low)	5.3% (Med)	29% (Med)
Huon Valley	14,858 (Med)	1,621 (Low)	39 (Med)	$707 (Med)	57.0% (Low)	7.3% (High)	33.5% (Med)
Southern Midlands	5,934 (Low)	-456 (Negative)	39 (Med)	$757 (Med)	60.7% (Med)	6.4% (Med)	26% (Med)
Tasman	2,317 (Low)	209 (Low)	47 (High)	$581 (Low)	51.7% (Low)	10.1% (High)	30.5% (Low)
Outer Area	**39,832**	**3702**	**42.6**	**$670**	**55.7%**	**7.45%**	**28.1%**

* Growth from 2008 to 2032

Table 15: Inner Area, Economic and Social Characteristic Summary

	Pop. Base	Forecast Pop. Growth*	Age	Wealth	Participation Rate	Unemployment	Education % with tertiary qualification
Brighton	15,198 (Med)	9,401 (High)	31 (Low)	$804 (Med)	60.2% (Med)	8.8% (High)	17% (Low)
Clarence	51,506 (High)	4,016 (Med)	39 (Med)	$946 (Med)	61.3% (Med)	5.2% (Med)	39% (Med)
Glenorchy	44,433 (Med)	-391 (Negative)	38 (Med)	$726 (Med)	58.6% (Low)	6.8% (Med)	25.5% (Med)
Hobart	49,611 (High)	8,778 (High)	37 (Med)	$1,035 (High)	57.0% (High)	5.5% (Med)	60.6% (High)
Kingborough	32,787 (Med)	9,189 (High)	38 (Med)	$1,033 (High)	64.3% (High)	4.5% (Low)	51% (High)
Sorell	12,795 (Med)	4,697 (Med)	39 (Med)	$778 (Med)	61.7% (Med)	6.6% (Med)	31% (Med)
Inner Area	**206,330**	**35,690**	**37**	**$887**	**60.5%**	**6.2%**	**37.4%**

* Growth from 2008 to 2032

Table 16: Outer and Inner Area Characteristics Summary, Averages

	Pop. Base	Forecast Pop. Growth*	Age	Wealth	Participation Rate	Unemployment	Education % with tertiary qualification
Outer Area	52,627	8,402	41.7	$685.3	57%	7.33%	28.5%
Inner Area	193,535	30,993	36.6	$908.8	62%	6.16%	38.6%

4. Jobs and Industry

4.1 Occupation and Industry of Work

As of 2006, there were a total of 93,736 full-time jobs in the Southern Region with retail and health and community services the dominant industry employers accounting for 16% and 13% of total employment respectively.

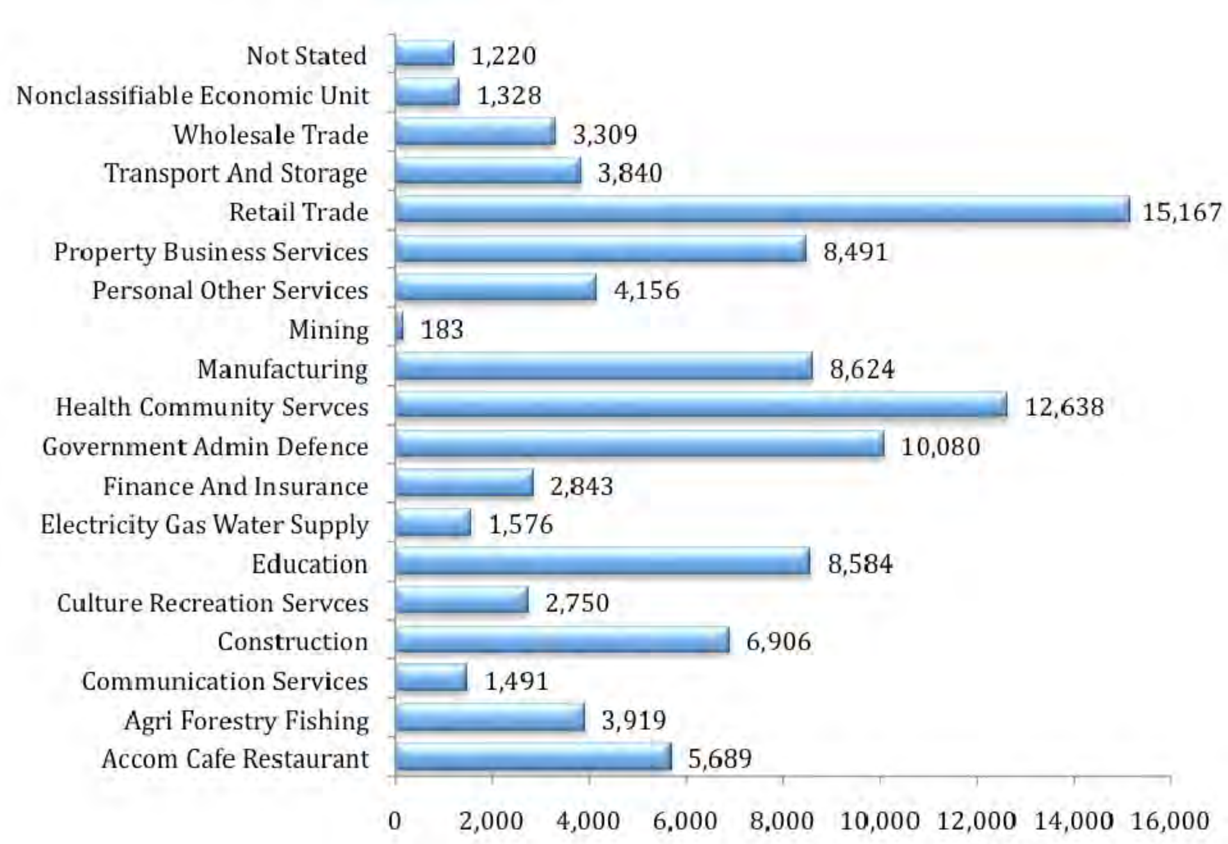

Figure 37: Industry of Work by Statistical Division, 2006 *(Source: ABS Census)*

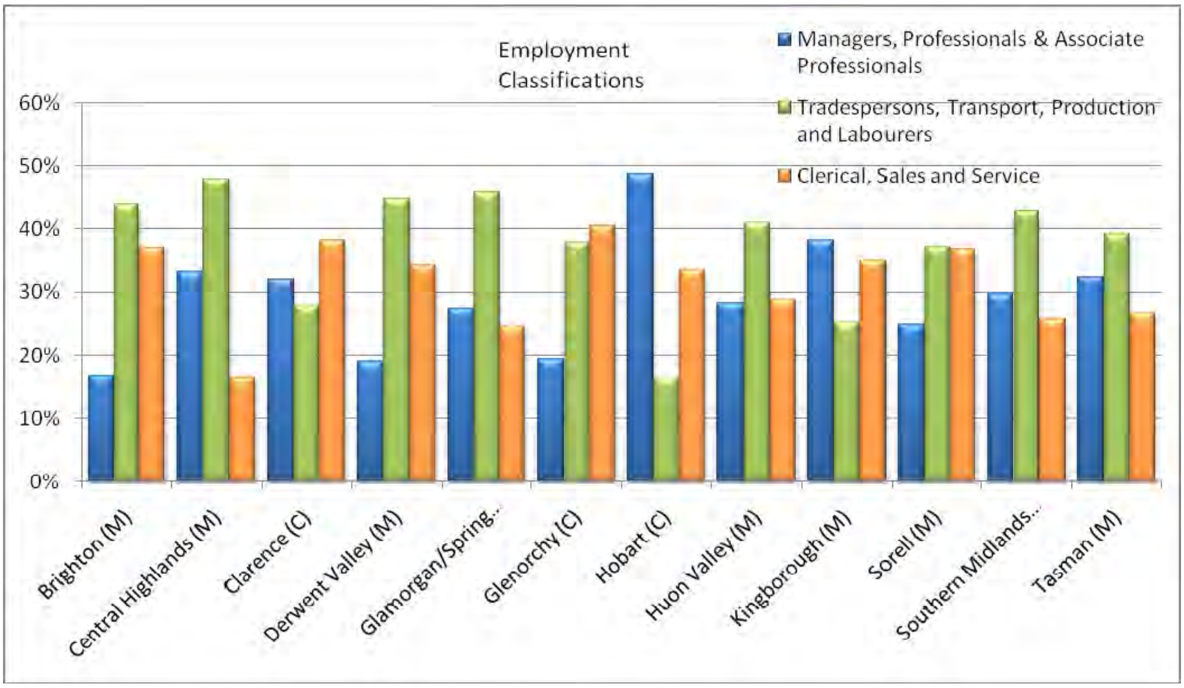

Figure 38: Industry of Work by Classification *(Source: ABS Census)*

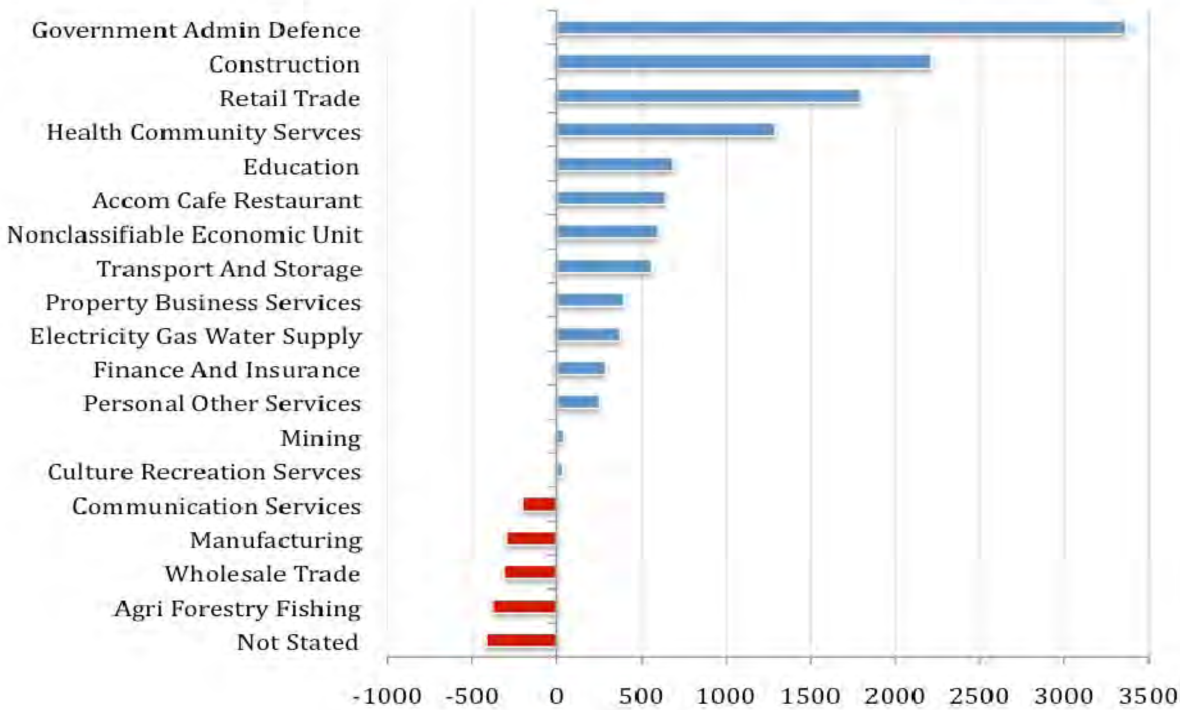

Figure 39: Jobs Growth by Industry, Southern Region, 2001-2006 *(Source: ABS Census)*

Recent job growth in the region has been most prominent in government, administration and defence; retail; and construction industries. Over 2001 to 2006, there were an additional 3,242 government, administration and defence jobs and a further 1,526 retail and 1,390 construction workers. Employment sectors such as manufacturing; agriculture, forestry and fishing; wholesale trade; and communication services all experienced a decline in employment over the same period. The greatest decline was seen in manufacturing with 499 jobs lost over the five years ending 2006 (Figure 39).

The breakdown of total jobs over the Southern Tasmania region shows that Hobart LGA has the highest concentration of jobs with a total of 47.7%. Glenorchy and Clarence have the next highest proportions of total jobs with 18.6% and 12.2% respectively. Central Highlands and Tasman have the lowest proportion of total jobs with a recorded 0.7% for both LGAs.

Table 17: Percentage of Total Jobs in Southern Tasmania by LGA 1996-2006 *(Source: ABS Census)*

	1996	2001	2006
	% Total Jobs	% Total Jobs	% Total Jobs
Brighton	4.3	1.8	1.8
Central Highlands	1	0.8	0.7
Clarence	22	11.4	12.2
Derwent Valley	3.9	2.5	2.3
Glamorgan Spring Bay	1.7	1.5	1.6
Glenorchy	18.7	19.1	18.6
Hobart	23.2	47.8	47.7
Huon Valley	5.1	4.1	3.9
Kingborough	12.7	6.9	7.2
Sorell	4.3	2	2.2
Southern Midlands	2.3	1.3	1.1
Tasman	0.8	0.8	0.7

Note: Statistics not available for 1986 and 1991 census.

As shown in Table 17 (above), the distribution of total jobs has been pronounced in some LGAs over the 10-year period of 1996-2006. Clarence experienced the largest decrease in proportion of total jobs, going from 22% in 1996 to 12.2% in 2006. Smaller decreases were experienced in both Kingborough and Brighton. In contrast, the proportion of total jobs in Hobart more than doubled in the 5-year period 1996 – 2001, increasing from 23.2% in 1996 to 47.8% in 2001. In 2006, Hobart carried 47.7% of total jobs in the Southern Tasmania region. Within the Hobart LGA, this figure can be further broken down according to the SLA's of Hobart-Inner and Hobart-Remainder that have 18% and 29.7% respectively of the region's total jobs. This substantial increase is indicative of the growth in the service and administration industries within the Southern Tasmania Region, and the recognised trend of high employment rates within the public service in Tasmania.

Table 18 over page, provides a breakdown of jobs by industry based on Journey to Work data for each LGA in the region. This has also been broken down to a Statistical Local Area level where this information is available.

Table 18: Jobs by Industry, Southern Tasmania by LGA and SLA, 2006 *(Source: ABS Census 2006 & ABS Journey to Work by SGS Pty Ltd)*

	Brighton	Clarence	C. Highlands	Derwent Valley	GSBC	Glenorchy	Hobart	Huon Valley	Kingborough	Sorell	S. Midlands	Tasman	Total	% Total Jobs
Agriculture, Forestry & Fishing	63	327	298	155	282	33	320	941	263	175	437	119	3,413	3.6
Mining	6	16	0	3	3	21	43	4	21	4	3	3	127	0.1
Manufacturing	103	703	13	527	163	3	1,547	323	609	248	75	39	4353	4.7
Electricity, Gas & Water	0	26	44	27	3	490	925	15	10	12	3	3	1558	1.7
Construction	165	830	16	95	89	1,478	1,129	179	570	152	26	12	4741	5.1
Wholesale Trade	76	349	6	34	40	1,083	1,126	161	168	65	29	13	3150	3.4
Retail Trade	307	2,396	22	293	172	3,166	5,565	502	1,513	460	81	56	14533	16.0
Accommodation, Cafes & Rest.	45	552	78	110	297	458	3,063	212	284	116	28	111	5354	5.7
Transport & Storage	161	443	21	55	53	1,374	786	111	149	76	34	17	3280	3.5
Communication Services	17	200	4	12	14	255	577	25	262	18	19	3	1406	1.5
Finance & Insurance	9	230	0	24	0	185	2,150	31	83	18	8	3	2741	2.9
Property & Business Services	83	801	9	107	72	1,044	5,050	157	460	129	14	20	7946	8.5
Govt. Admin & Defence	107	686	51	127	66	625	7,295	169	464	115	58	43	9806	11.5
Education	279	1,268	37	222	66	1,073	3,956	311	697	168	111	46	8234	8.8
Health & Community Services	175	1,299	18	261	77	1,509	7,234	318	759	182	58	32	11922	13.0
Cultural & Recreation Services	49	302	13	14	45	338	1,477	56	125	38	21	107	2585	2.8
Personal & Other Services	82	817	12	54	24	434	2,104	83	182	64	16	9	3881	4.1
Non-Class Economic & Not Stated	19	148	5	30	14	171	361	45	107	30	29	18	977	1.1
Total	**1,746**	**11,393**	**647**	**2,150**	**1,480**	**17,469**	**44,708**	**3,643**	**6,726**	**2,070**	**1,050**	**654**	**93,736**	

Note the breakdown below is of the LGAs into their respective SLAs.43

	Derw. Val Pt A	Derw. Val Pt B	Derwent Valley	Hobart Inner	Hobart Remainder	Hobart	Kingborough Pt A	Kingborough Pt B	Kingborough	Sorell Pt A	Sorell Pt B	Sorell
Agriculture, Forestry & Fishing	50	105	155	184	136	320	161	102	263	94	81	175
Mining	3	0	3	7	36	43	21	0	21	4	0	4
Manufacturing	501	26	527	521	1,026	1,547	551	58	609	225	23	248
Electricity, Gas & Water	8	19	27	14	911	925	7	3	10	12	0	12
Construction	68	27	95	113	1,016	1,129	518	52	570	133	19	152
Wholesale Trade	25	9	34	157	969	1,126	156	12	168	53	12	65
Retail Trade	279	14	293	,2342	3,223	5,565	1,474	39	1,513	431	29	460
Accommodation, Cafes & Rest.	76	34	110	607	2,456	3,063	199	85	284	104	12	116
Transport & Storage	47	8	55	147	639	786	118	31	149	66	10	76
Communication Services	9	3	12	469	108	577	259	3	262	15	3	18
Finance & Insurance	21	3	24	1,526	624	2,150	80	3	83	18	0	18
Property & Business Services	88	19	107	2,070	2,980	5,050	430	30	460	120	9	129
Govt. Admin & Defence	104	23	127	3,655	3,640	7,295	448	16	464	112	3	115
Education	186	36	222	437	3,519	3,956	634	63	697	150	18	168
Health & Community Services	254	7	261	3,092	4,142	7,234	740	19	759	176	6	182
Cultural & Recreation Services	6	8	14	357	1,120	1,477	117	8	125	32	6	38
Personal & Other Services	40	14	54	1,098	1,006	2,104	169	13	182	61	3	64
Non-Class Economic	1916	14	30	76	285	361	91	16	107	27	3	30
Total	**1,781**	**369**	**2,150**	**16,872**	**27,836**	**44,708**	**6,173**	**553**	**6,726**	**1,833**	**237**	**2,070**

Table 19: Jobs by Industry, Metropolitan & Non-Metropolitan 2006 *(Source: ABS Census & ABS Journey to Work by SGS Pty Ltd)*

	Hobart		Metropolitan*		Non-Metropolitan		Total No. of Jobs
	Jobs	% Total	Jobs	% Total	Jobs	% Total	
Agriculture, Forestry & Fishing	320	1%	1,336	2%	2,077	28%	3,413
Mining	43	0%	114	0%	13	0%	127
Manufacturing	1,547	3%	7,469	9%	613	8%	8,082
Electricity, Gas & Water	925	2%	1,490	2%	68	1%	1,558
Construction	1,129	3%	4,419	5%	322	4%	4,741
Wholesale Trade	1,126	3%	2,901	3%	249	3%	3,150
Retail Trade	5,565	12%	13,700	16%	833	11%	14,533
Accommodation, Cafes & Rest.	3,063	7%	4,628	5%	726	10%	5,354
Transport & Storage	786	2%	3,044	4%	236	3%	3,280
Communication Services	577	1%	1,341	2%	65	1%	1,406
Finance & Insurance	2,150	5%	2,699	3%	42	1%	2,741
Property & Business Services	5,050	11%	7,674	9%	272	4%	7,946
Govt. Admin & Defence	7,295	16%	9,419	11%	387	5%	9,806
Education	3,956	9%	7,663	9%	571	8%	8,234
Health & Community Services	7,234	16%	11,419	13%	503	7%	11,922
Cultural & Recreation Services	1,477	3%	2,343	3%	242	3%	2,585
Personal & Other Services	2,104	5%	3,737	4%	144	2%	3,881
Non-Classifiable Economic units	337	1%	803	1%	106	1%	909
Not stated	24	0%	63	0%	5	0%	68
Total	**44,708**	**100%**	**86,262**	**100%**	**7,474**	**100%**	**93,736**

* Same as Greater Hobart (see Figure 1)

Table 19 shows the importance of the Hobart LGA for providing employment, while also showing that Glenorchy, Clarence and Kingborough play important supporting roles for employment in the region. Table 12 also shows that the vast majority of jobs in most sectors are contained in the metropolitan area with the exception of Agriculture, Forestry and Fishing. This also shows that a high proportion of jobs in Manufacturing; Construction; Wholesale Trade; and Transport and Storage are in the metropolitan area but outside of Hobart. Hobart has a large share of metropolitan jobs in the areas of Accommodation, Cafes & Restaurants; Finance and Insurance; Property and Business Services; Government Administration and Defence; Education; Health and Community Services; Cultural and Recreational Services; and Personal and other Services.

4.2 Employment Subregions

The LGAs of the Southern Region can be grouped based on the connectivity between the statistical divisions and geographical distribution. For the purposes of employment and job distribution the Southern Region has been divided into the four sub-regions of East, North West, South West, and Central regions (Figure 40).

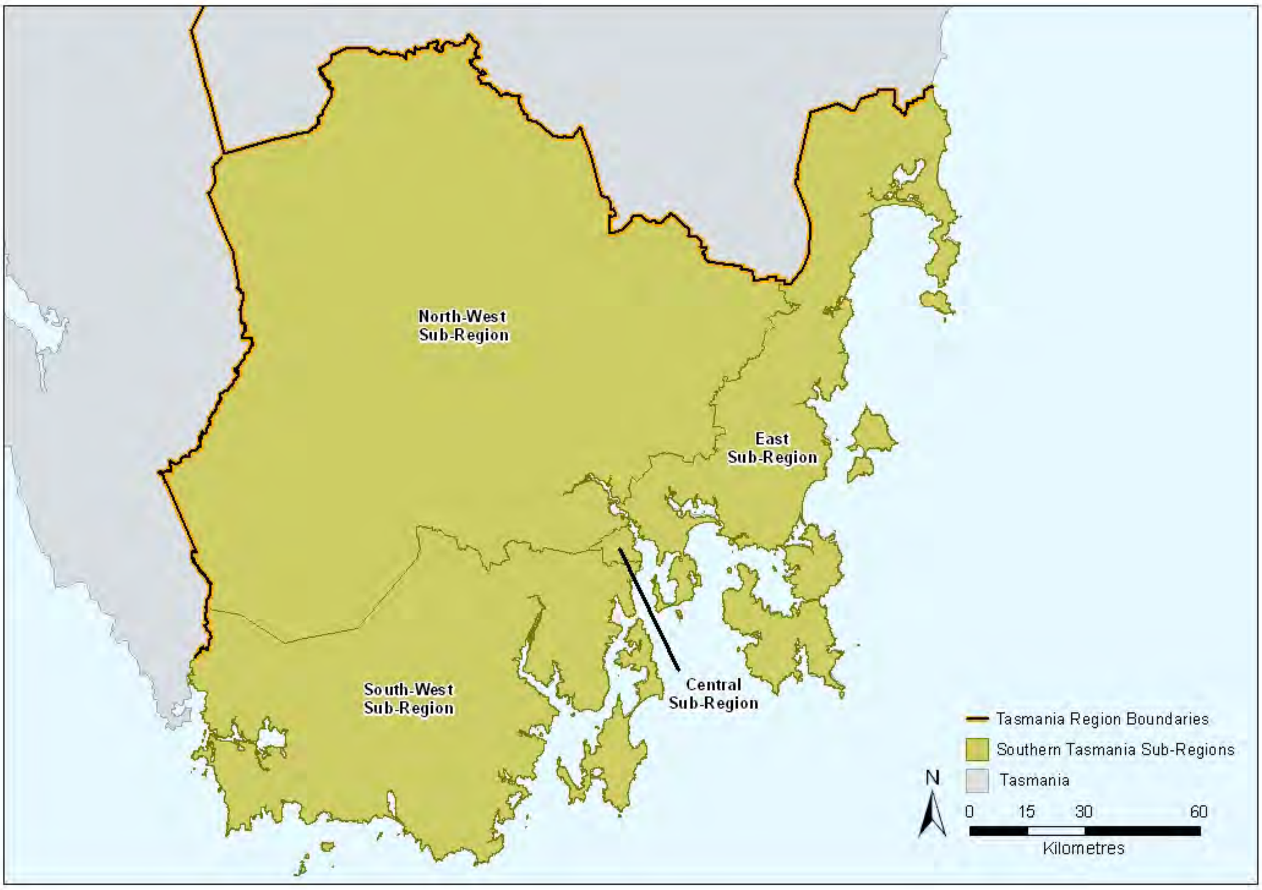

Figure 40: Southern Regional Employment Sub-Regions

Table 20 illustrates the number of jobs located within the boundaries of each sub-region and it is shown that the Central area accounts for the greatest share of employment with around 48% of all Southern Region jobs. In contrast, the South West has fewer job opportunities available, with approximately 11% of total jobs located in the area.

Table 20: Jobs by Industry, Southern region and sub-regions, 2006 *(Source: ABS Census & Journey to Work by SGS Pty Ltd)*

	East		North-West		South-West		Central		Total No. of Jobs
	Jobs	% Total	Jobs	% Total	Jobs	% Total	Jobs	% Total	
Agriculture, Forestry & Fishing	903	26.5%	986	28.9%	1,204	35.3%	320	9.4%	3,413
Mining	26	20.5%	33	26.0%	25	19.7%	43	33.9%	127
Manufacturing	1,153	14.3%	4,450	55.1%	932	11.5%	1,547	19.1%	8,082
Electricity, Gas & Water	44	2.8%	564	36.2%	25	1.6%	925	59.4%	1,558
Construction	1,083	22.8%	1,780	37.5%	749	15.8%	1,129	23.8%	4,471
Wholesale Trade	467	14.8%	1,228	39.0%	329	10.4%	1,126	35.7%	3,150
Retail Trade	3,084	21.2%	3,869	26.6%	2,015	13.9%	5,565	38.3%	14,533
Accommodation, Cafes & Rest.	1,076	20.1%	719	13.4%	496	9.3%	3,063	57.2%	5,354
Transport & Storage	589	18.0%	1,645	50.2%	260	7.9%	786	24.0%	3,280
Communication Services	235	16.7%	307	21.8%	287	20.4%	577	41.0%	1,406
Finance & Insurance	251	9.2%	226	8.2%	114	4.2%	2,150	78.4%	2,741
Property & Business Services	1,022	12.9%	1,257	15.8%	617	7.8%	5,050	63.6%	7,946
Govt. Admin & Defence	910	9.3%	968	9.9%	633	6.5%	7,295	74.4%	9,806
Education	1,548	18.8%	1,722	20.9%	1,008	12.2%	3,956	48.0%	8,234
Health & Community Services	1,590	13.3%	2,021	17.0%	1,077	9.0%	7,234	60.7%	11,922
Cultural & Recreation Services	492	19.0%	435	16.8%	181	7.0%	1,477	57.1%	2,585
Personal & Other Services	914	23.6%	598	15.4%	265	6.8%	2,104	54.2%	3,881
Non-Classifiable	193	21.2%	234	25.7%	145	16.0%	337	37.1%	909
Not Stated	17	25.0%	20	29.4%	7	10.3%	24	35.3%	68
Total	**15,597**	**16.6%**	**23,062**	**24.6%**	**10,369**	**11.1%**	**44,708**	**47.7%**	**93,736**

4.2.1 Eastern Sub-region

The Eastern sub-region incorporates the LGAs of Glamorgan-Spring Bay; Clarence; Sorell; and Tasman. Employing over 3,000 workers, the 'retail' sector is the greatest employer in the Eastern sub-region and also experienced the greatest job growth since 2001 with slightly fewer than 600 additional positions (Figure 42). 'Health and community services' and 'education' generate employment for around 1,590 and 1,548 workers respectively. The 'construction' industry appears to be an emerging sector with a further 390 placements since 2001.

Figure 41: East Sub-Region

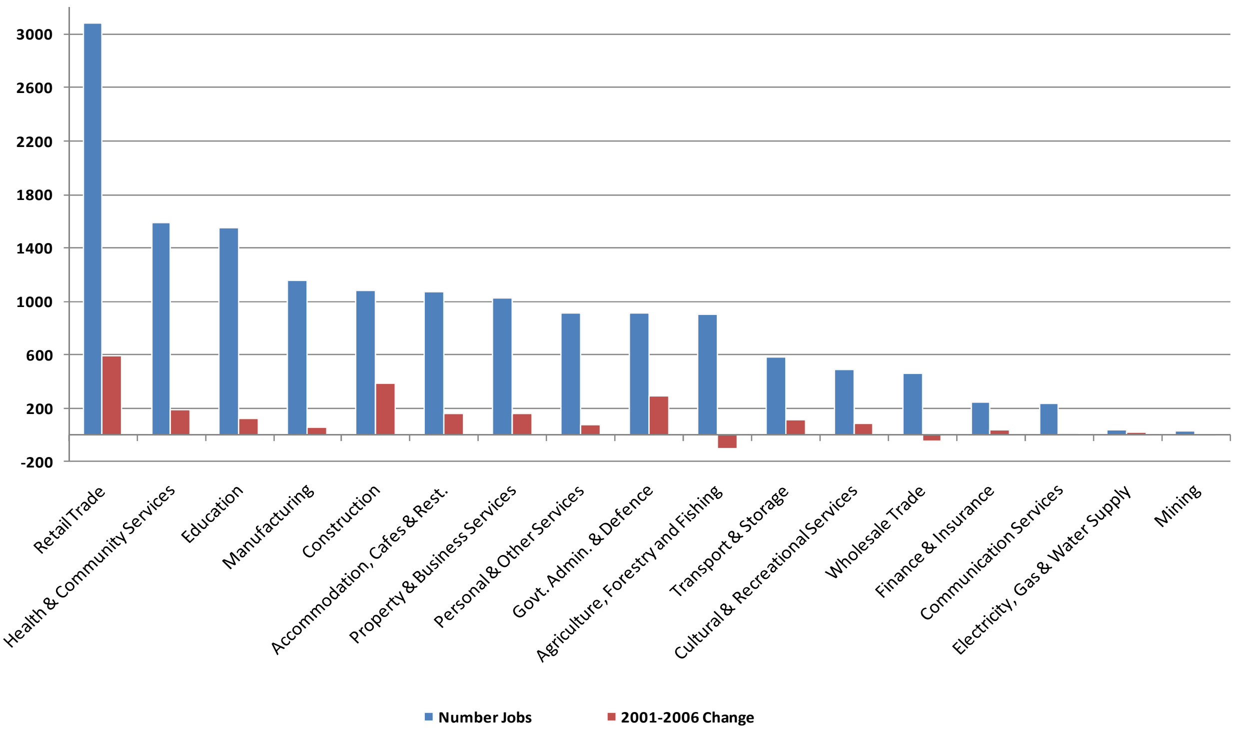

Figure 42: Employment 2006 and 2001-2006 change, Eastern Sub-region *(Source: ABS Journey to Work uby SGS Pty Ltd)*

4.2.2 North-Western Sub-region

The North Western sub-region, encompassing Southern Midland; Brighton; Central Highlands; Derwent Valley; and Glenorchy is dominated by 'manufacturing' and 'retail' employment (see Figure 44). As of 2006, there were 4,450 'manufacturing' jobs located in the South Western sub-region although this number declined by 338 since 2001. In contrast, the number of 'retail' workers employed in the region grew 320 to 3,869 by 2006. Similarly, to the Eastern sub-region, the 'construction' area accounts for a large proportion of job growth with an additional 554 jobs over the five year period.

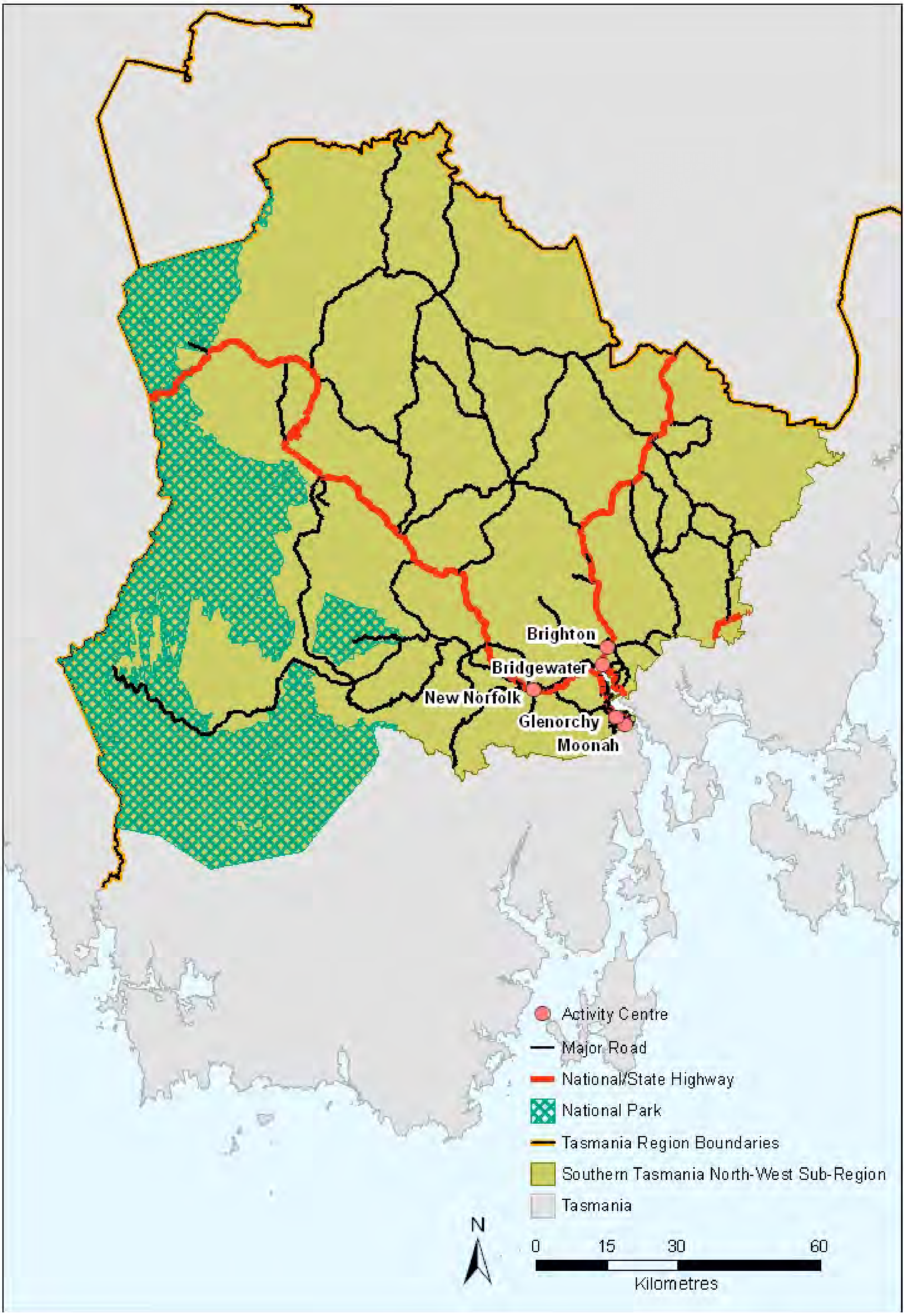

Figure 43: North-West Sub-region

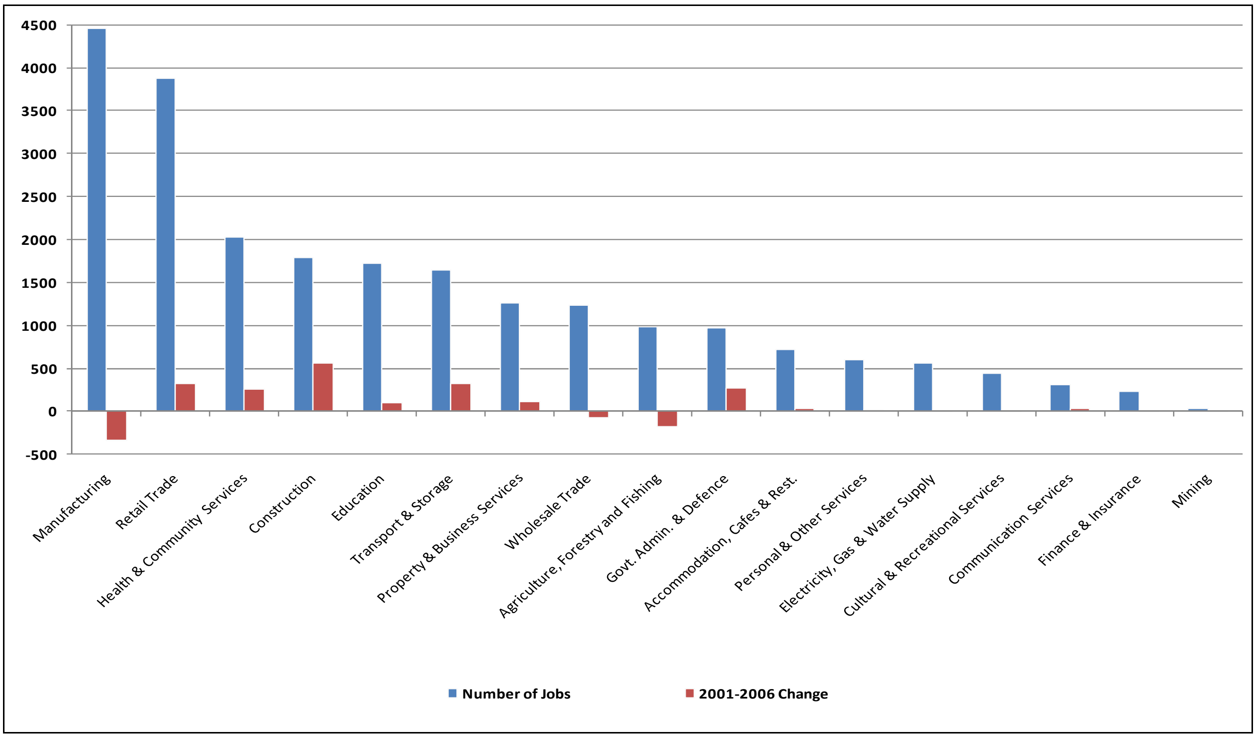

Figure 44: Employment 2006 and 2001-2006 change, North West Sub-region *(Source: ABS Journey to Work by SGS Pty Ltd)*

4.2.3 South-Western Sub-Region

The South Western sub-region of Huon Valley and Kingborough also contains a growing 'retail' industry with a further 537 jobs in 2006, increasing retail employment to 2,015 (Figure 46). Other prominent industries consist of 'agriculture, forestry and fishing' and 'health and community services' with a total of 1,204 and 1,077 jobs located respectively within the two LGAs. Following trends of both the Eastern and North Wesernt sub-regions, the 'construction' sector also experience strong job growth with 313 extra jobs in the South Western sub-region.

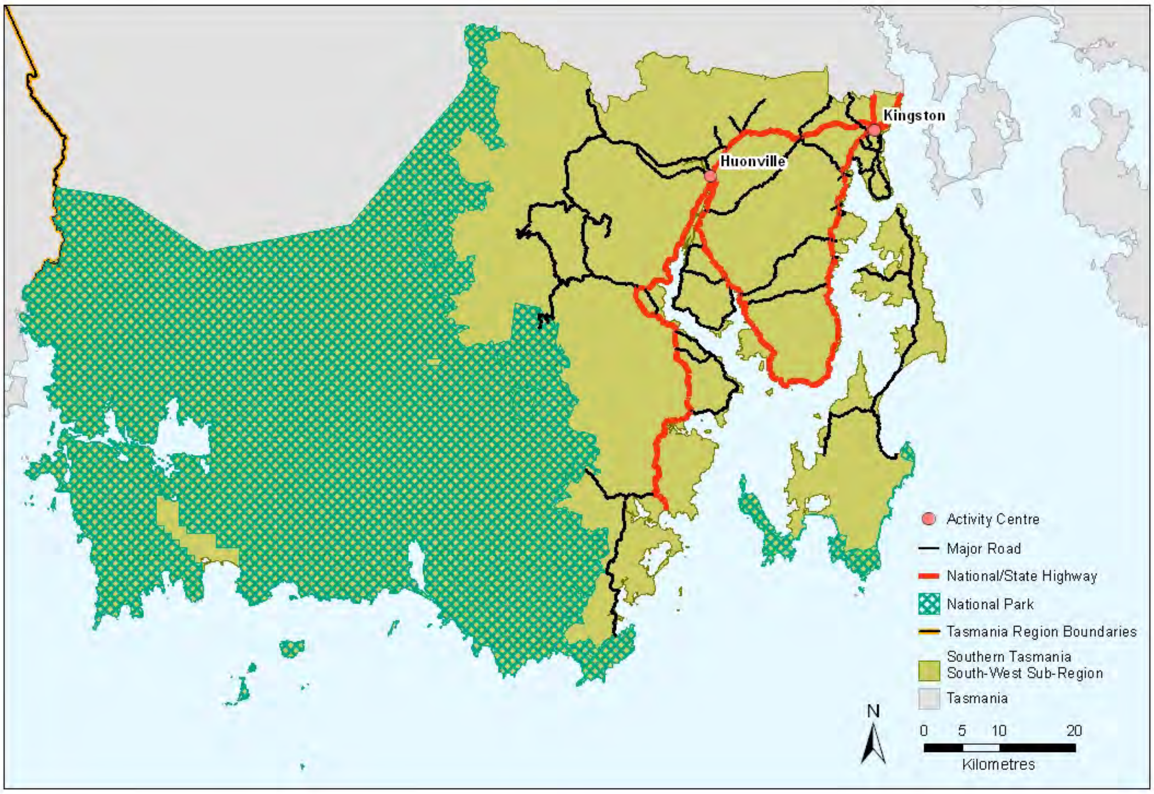

Figure 45: South-West Sub-region

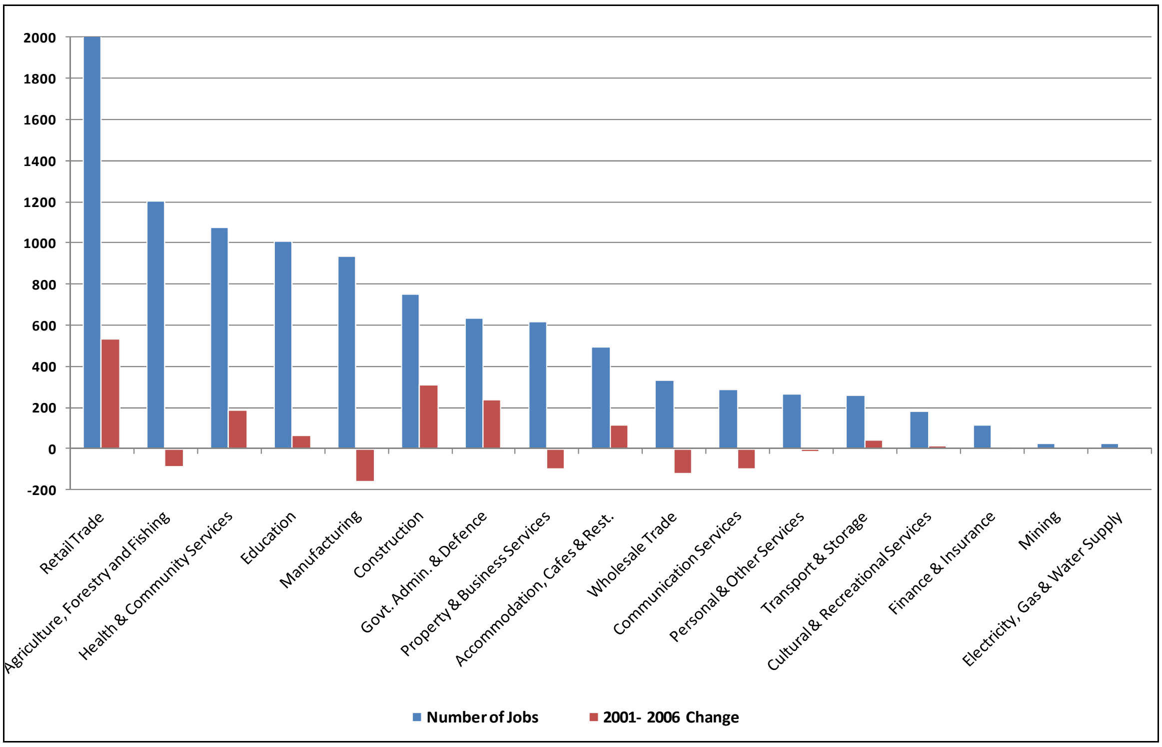

Figure 46: Employment 2006 and 2001-2006 change, South West Sub-region *(Source: ABS Journey to Work by SGS Pty Ltd)*

4.2.4 Central Sub-region

The LGA of Hobart solely represents the Central sub-region and provides around 48% of the total number of jobs in the Southern Tasmania. The Central sub-region is where the majority of 'government administration and defence' employment is concentrated with 7,295 jobs and approximately 74% total employment. This sector experienced significant growth from 2001 with an additional 2,450 jobs created in the five years ending 2006. This increase represented over 64% of all job creation in the Central sub-region with 'electricity, gas and water services' and 'education' accounting for 334 and 313 additional jobs respectively by 2006. 'Health and community services' is also prominent in the Central sub-region with 7,234 jobs in the sector.

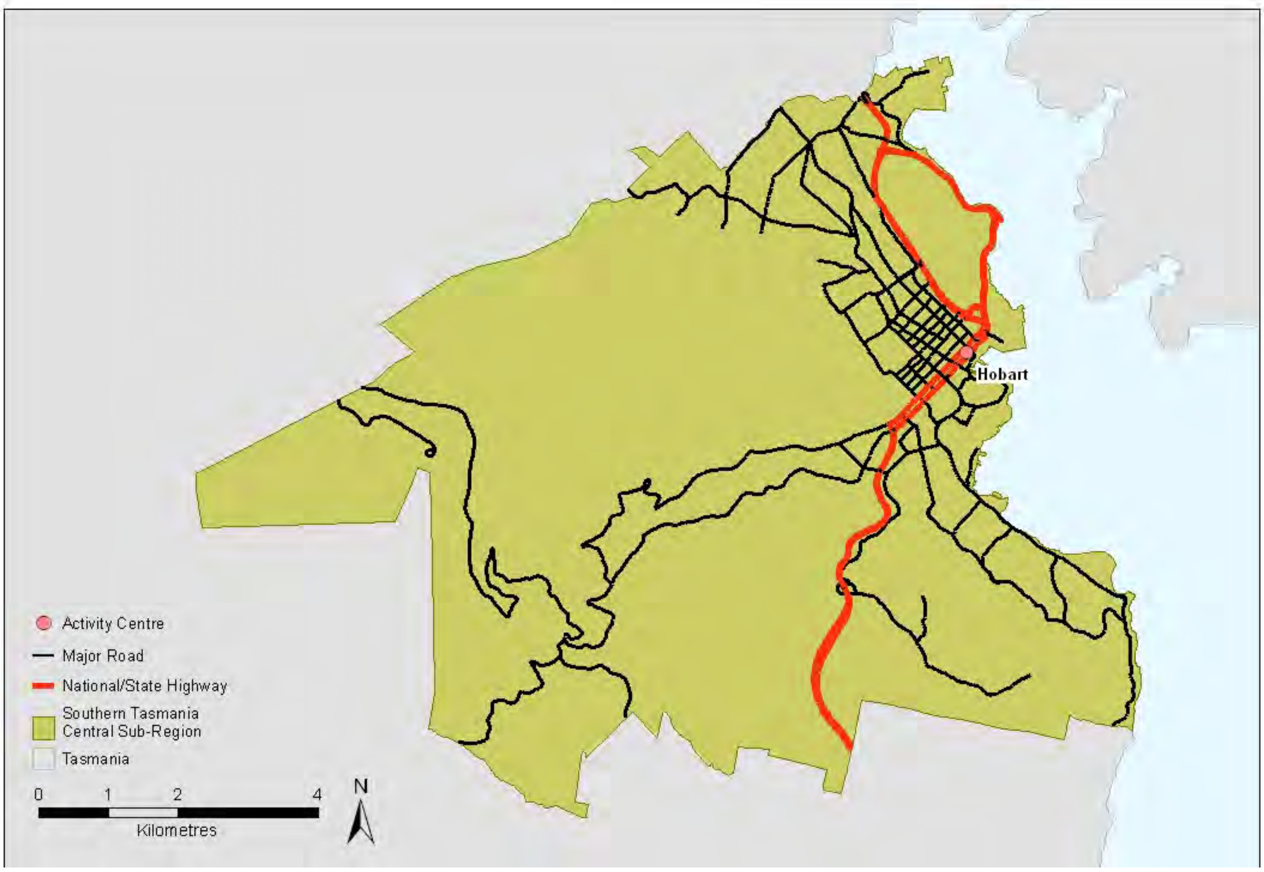

Figure 47: Central Sub-region

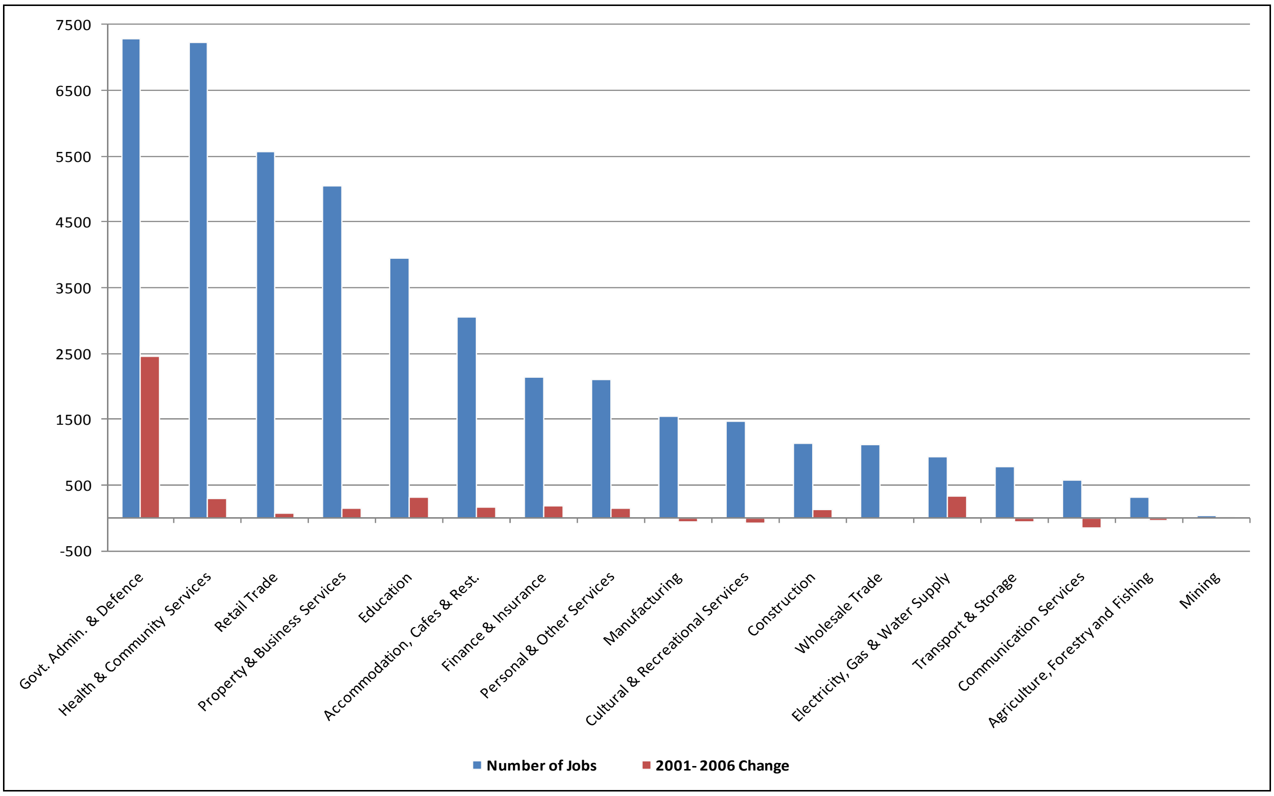

Figure 48: Employment 2006 and 2001-2006 change, Central Sub-region *(Source: ABS Journey to Work by SGS Pty Ltd)*

4.3 Employment Self Sufficiency

Self sufficiency is a measure of an area's potential to employ the local labour force. It shows the number of jobs available in a given area as a proportion of the local labour force. A self sufficiency of 80% would imply 80% of working residents can potentially live and work in the same area. With an estimated 109,400 jobs and 111,916 employed residents in the Southern Region (after scaling), the area has a total employment self sufficiency of 98%.

Self-sufficiency = Total Jobs in the region/Total Employed Residents

As the Southern Region encompasses a significant proportion of the State's population, there are a number of industry sectors with a self sufficiency rate around 100%. Industry sectors with lower self sufficiency rates suggest that a number of Southern Tasmanian residents travel out of the region to their place of work. Not surprisingly, the 'mining' sector has the greatest proportion of workers travelling interstate or abroad to their work destination.

Table 21: Employment Self Sufficiency, 2006 *(Source: ABS Journey to Work by SGS Pty Ltd)*

	East	North-West	South West	Central	Total
Agriculture, Forestry & Fishing	94%	83%	94%	117%	92%
Mining	38%	79%	57%	152%	69%
Manufacturing	53%	129%	67%	146%	100%
Electricity, Gas & Water	11%	125%	10%	212%	102%
Construction	51%	89%	54%	145%	76%
Wholesale Trade	49%	111%	55%	233%	100%
Retail Trade	74%	84%	76%	192%	101%
Accommodation, Cafes & Rest.	67%	55%	61%	188%	100%
Transport & Storage	51%	123%	48%	152%	92%
Communication Services	57%	66%	100%	223%	99%
Finance & Insurance	29%	34%	24%	294%	100%
Property & Business Services	46%	70%	42%	195%	98%
Govt. Admin & Defence	34%	42%	34%	264%	101%
Education	68%	111%	59%	151%	101%
Health & Community Services	50%	59%	47%	237%	100%
Cultural & Recreation Services	61%	82%	40%	175%	98%
Personal & Other Services	71%	54%	38%	246%	98%
Total	**56%**	**83%**	**56%**	**203%**	**98%**

It is clear from Table 21 above that the Central region acts as an employment hub, with a total of 52,163 jobs and 25,647 employed residents. This implies the sub-region has an extra 26,516 jobs employing the wider Tasmanian community. Lower self sufficiency rates in the East and South West imply that the majority of employed residents must travel interstate or abroad to their destination of employment.

This analysis can also be used to highlight industry sectors that are particular prominent and attract employment from outside the local area. In the North Western area of the region, the industrial sectors appear to be most dominant with 'manufacturing', 'electricity, gas and water supply' and 'transport and storage' all with self-sufficiency rates well over 100%. In the Eastern area, 'agriculture' jobs employs over 1,000 resident workers or around 94% of all residents working in the sector.

Table 22: Employment Self-Sufficiency by LGA and SLA, 2006 *(Source: ABS Census & Journey to Work by SGS Pty Ltd)*

	Brighton	Clarence	Central Highlands	Derwent Valley	Glamorgan Spring Bay	Glenorchy	Hobart	Huon Valley	Kingborough	Sorell	Southern Midlands	Tasman
Agriculture, Forestry & Fishing	74%	110%	94%	75%	91%	26%	116%	108%	66%	82%	100%	95%
Mining	51%	40%	0%	30%	119%	109%	161%	24%	82%	18%	91%	60%
Manufacturing	16%	46%	34%	93%	106%	194%	146%	69%	67%	54%	28%	87%
Electricity, Gas & Water	0%	8%	133%	46%	0%	169%	213%	37%	5%	20%	14%	78%
Construction	40%	55%	33%	40%	88%	128%	144%	45%	57%	34%	18%	26%
Wholesale Trade	36%	49%	78%	42%	84%	151%	233%	87%	41%	37%	32%	69%
Retail Trade	35%	76%	47%	65%	96%	106%	192%	76%	76%	60%	31%	100%
Accommodation, Cafes & Rest.	19%	56%	117%	74%	107%	58%	188%	92%	49%	49%	41%	106%
Transport & Storage	60%	56%	66%	36%	81%	173%	152%	62%	42%	28%	34%	62%
Communication Services	21%	64%	69%	48%	111%	80%	220%	42%	116%	20%	57%	79%
Finance & Insurance	9%	31%	0%	37%	0%	40%	294%	41%	21%	19%	22%	79%
Property & Business Services	25%	45%	63%	58%	83%	90%	194%	54%	39%	37%	14%	69%
Govt. Admin & Defence	31%	31%	85%	48%	85%	41%	263%	46%	31%	29%	43%	79%
Education	118%	67%	94%	126%	97%	111%	151%	90%	51%	61%	82%	92%
Health & Community Services	32%	52%	45%	51%	81%	70%	237%	59%	44%	35%	29%	67%
Cultural & Recreation Services	48%	55%	105%	35%	128%	101%	175%	52%	37%	30%	54%	120%
Personal & Other Services	40%	81%	74%	57%	68%	59%	245%	59%	33%	29%	27%	50%
Total	**36%**	**55%**	**83%**	**65%**	**94%**	**105%**	**203%**	**72%**	**50%**	**43%**	**48%**	**87%**

Note the breakdown below is of the LGAs into their respective SLAs.

	Derw. Val Pt A	Derw. Val Pt B	Derwent Valley	Hobart Inner	Hobart Remainder	Hobart	Kingborough Pt A	Kingborough Pt B	Kingborough	Sorell Pt A	Sorell Pt B	Sorell
Agriculture, Forestry & Fishing	63%	82%	75%	0%	59%	116%	52%	114%	66%	66%	111%	82%
Mining	39%	0%	30%	0%	135%	161%	82%	0%	82%	23%	0%	18%
Manufacturing	126%	16%	93%	18311%	97%	146%	67%	62%	67%	55%	49%	54%
Electricity, Gas & Water	21%	88%	46%	476%	211%	213%	3%	45%	5%	20%	0%	20%
Construction	40%	41%	40%	2034%	130%	144%	57%	62%	57%	33%	47%	34%
Wholesale Trade	40%	49%	42%	5427%	202%	233%	41%	47%	41%	33%	83%	37%
Retail Trade	84%	12%	65%	15329%	112%	192%	78%	42%	76%	59%	64%	60%
Accommodation, Cafes & Rest.	81%	63%	74%	1499%	154%	188%	40%	101%	49%	49%	53%	49%
Transport & Storage	45%	17%	36%	2237%	125%	152%	39%	64%	42%	26%	63%	28%
Communication Services	66%	27%	48%	0%	41%	220%	125%	16%	116%	17%	77%	20%
Finance & Insurance	44%	17%	37%	22483%	87%	294%	21%	14%	21%	19%	0%	19%
Property & Business Services	75%	28%	58%	10262%	116%	194%	39%	37%	39%	37%	34%	37%
Govt. Admin & Defence	61%	24%	48%	16530%	133%	263%	32%	18%	31%	30%	14%	29%
Education	169%	55%	126%	1976%	135%	151%	50%	67%	51%	58%	111%	61%
Health & Community Services	68%	5%	51%	13549%	137%	237%	45%	18%	44%	36%	17%	35%
Cultural & Recreation Services	30%	40%	35%	3394%	134%	175%	37%	36%	37%	32%	23%	30%
Personal & Other Services	60%	49%	57%	19038%	118%	245%	33%	30%	33%	29%	63%	29%
Total	**80%**	**34%**	**65%**	**8941%**	**127%**	**203%**	**50%**	**54%**	**50%**	**42%**	**59%**	**43%**

Table 23: Employment Self Sufficiency, Metropolitan & Non-Metropolitan 2006 *(Source: ABS Journey to Work by SGS Pty Ltd)*

	Metropolitan*	Non-Metropolitan	Total
Agriculture, Forestry & Fishing	83%	101%	93%
Mining	73%	47%	69%
Manufacturing	105%	63%	100%
Electricity, Gas & Water	103%	68%	101%
Construction	80%	44%	75%
Wholesale Trade	104%	71%	100%
Retail Trade	104%	69%	101%
Accommodation, Cafes & Rest.	100%	97%	100%
Transport & Storage	97%	58%	92%
Communication Services	102%	57%	98%
Finance & Insurance	105%	33%	100%
Property & Business Services	101%	52%	98%
Govt. Admin & Defence	105%	55%	101%
Education	102%	89%	101%
Health & Community Services	103%	54%	200%
Cultural & Recreation Services	100%	86%	98%
Personal & Other Services	102%	53%	98%
Total	**101%**	**72%**	**98%**

* Same as Greater Hobart (see Figure 1)

Not surprisingly, the metropolitan area has a self-sufficiency of over 100%, meaning there are more jobs in the metropolitan area than there are employed residents. Whilst some residents of the Metropolitan area would travel outside the area for work, the majority find work within the area, with a number of persons entering the Metro for work every day.

4.4 Summary

Across the Southern Tasmania region employment is dominated by Retail Trade, Health and Community Services, Government Administration and Defence. These are followed by Education, Manufacturing, and Property and Business Services, all at around the same proportion. Across the region employment is dominated by retail and government related employment. Given that the bulk of government related employment will be attracted to the CBD (apart from population based services such as education, local health services, customer service centres), this leaves relatively little apart from the traditional retail employment in activity centres. While a range of employment in professional services, finance and insurance, and personal services, will continue to locate in centres, these are likely to relatively small scale, serving the sub-regional market, and there is likely to be limited employment to significantly boost employment diversity in activity centres. While not generally located within activity centres, employment in the sub-regions is bolstered by manufacturing, wholesale, transport and distribution and other population services (health and education) which retain activity within the sub-regions.

Employment growth from 2001-2006 has been dominated by Government Administration and Defence (approximately 3,250 jobs), of which most has been concentrated in Hobart LGA (approximately 2,500 jobs) in or near the CBD. The CBD is the major supplier of jobs for the region and these jobs are dominated by Government Administration and Defence, and Health and Community Services. Between these two sectors the Government (either State or Federal) is the biggest employer. The location of a large range of government offices in Hobart will continue to attract more of the same for the ease of doing business that this facilitates. The decision of government about future investment in Hobart will have a significant impact on future growth and development, although the current focus is unlikely to change. These sectors were followed by Retail Trade, Property and Business Services and Education.

Hobart provides around 48% of the total jobs in the Southern Tasmania region, but only around 20% of the population. If this balance of jobs is maintained, access to the CBD for commuters, shoppers, and those doing business will need to be carefully managed to ensure good access is maintained.

Generally the East, North West and South West sub-regions as defined by SGS with regard to geographic and accessibility constraints have employment generally dominated by population driven sectors of Retail Trade, Health and Community Services, and Education. The North West region however, has the largest proportion of employment in Manufacturing, which is concentrated in Glenorchy and to some extent Brighton. The South West has a high level (second largest sector) of employment in Agriculture, Forestry and Fishing. In both of these cases the two exceptions of Manufacturing and Agriculture, Forestry and Fishing have declined between 2001 and 2006. These are employment sectors which have relatively little employment based in activity centres and therefore the diversity of employment in activity centres will be likely to remain low.

The East region has approximately 17% of employment in Southern Tasmania and 29% of the population. The North West region has approximately 25% of employment in Southern Tasmania and 32% of the population. The South West region has approximately 11% of employment in Southern Tasmania and 19% of the population. Therefore it is clear the each sub region requires jobs which are not located in the sub-region. While some of these may be provided in other sub-regions, a large proportion of them are expected to be provided in Hobart, particularly in the areas of government, administration, retail, finance, and cultural services.

5. Building Approvals

5.1 Introduction

At the strategic level, the location of residential development has subsequent impacts upon the accessibility of services, the amount of land necessary, the type of environmental values affected, the efficient use of existing infrastructure and/or the need for additional infrastructure. Analysing existing residential building approvals assists in identifying locational and market trends, potential demand for residential land, changing dwelling sizes and impacts of demographic change on demand for new dwellings.

Consequently this section has focussed on residential building approvals, with non-residential building approvals only considered in context of value.

5.2 Dwelling Approvals

Southern Tasmania as the largest region in population sees the most residential building approvals each year with nearly double that occurring in either the north-west or northern region.

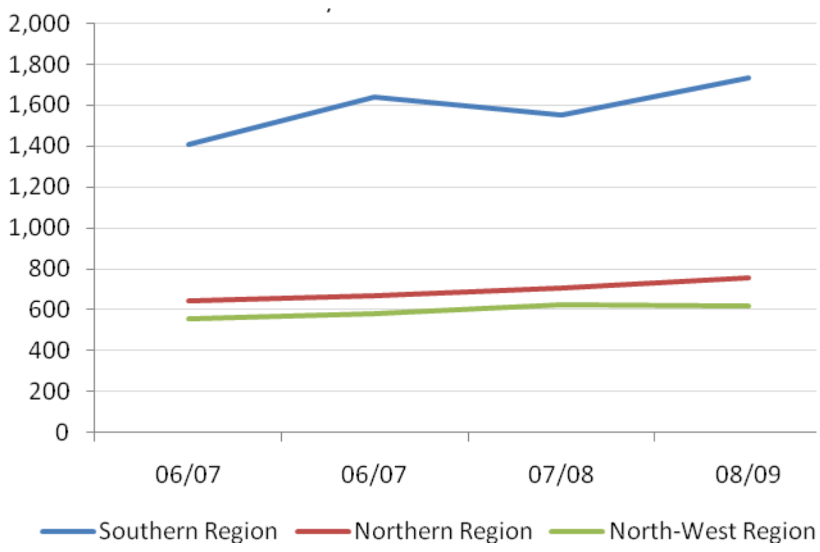

Figure 49: Number of New Dwellings by Region, 2006 – 2009 *(Source: ABS Building Approvals)*

The most intense residential building activity is centred in Greater Hobart with 73.5% of new dwellings constructed over the past 10 years (Figure 49 and Table 24). At a LGA level, Kingborough (20.76%) and Clarence (20.37%) together have seen over 40% of the total amount of new dwellings constructed in the region over the past 10 years. The other local government areas comprising Greater Hobart following Kingborough and Clarence in leading residential building are Glenorchy, Brighton, Hobart and Sorell.

Outside of the Greater Hobart area, the Huon Valley sees the greatest percentage of building approvals of all the rural LGAs with 7.17% of all residential dwelling approvals across the last 10 years, followed by Tasman with 4.46% and Glamorgan Spring Bay with 4.06%.

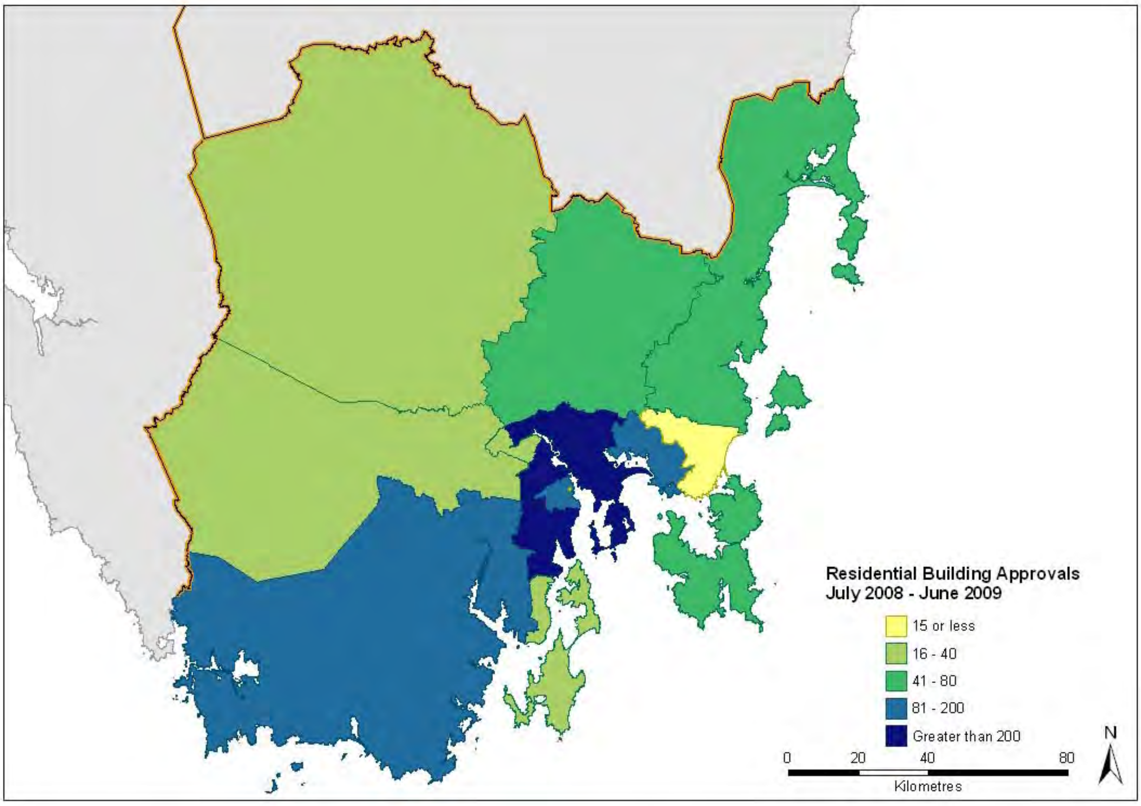

Figure 50: Residential Dwelling Approvals by SLA in Southern Tasmania, 2008 – 2009 *(Source: ABS Building Approval Data)*

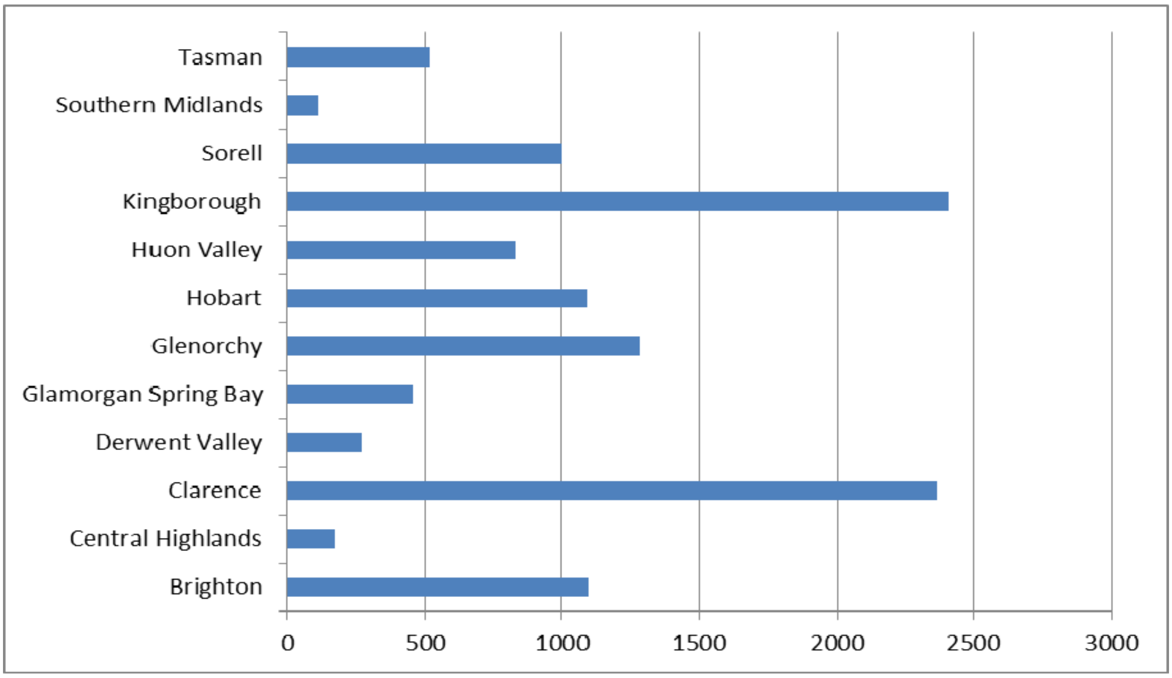

Figure 51: Residential Dwelling Approvals by LGA, 1999 – 2009 *(Source: ABS Building Approvals)*

Residential building activity has not however been consistent across the last 10 years. Peaks and troughs are generally consistent with trends in residential construction across Australia. Causes of this peak in residential construction relates to the general condition of the Australian economy, low interest rates, relatively low construction costs (as compared to extending and upgrading existing dwellings) and the first home owners grant.

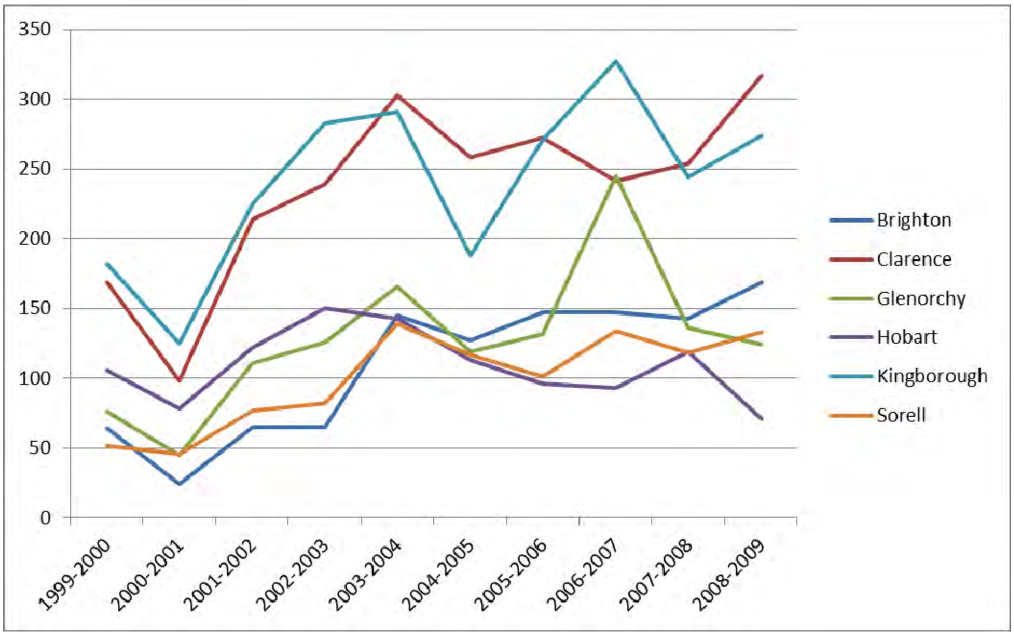

Figure 52: No. of Dwelling Approvals by LGA for Greater Hobart, 2000 – 2009 *(Source: ABS Building Approvals Data)*

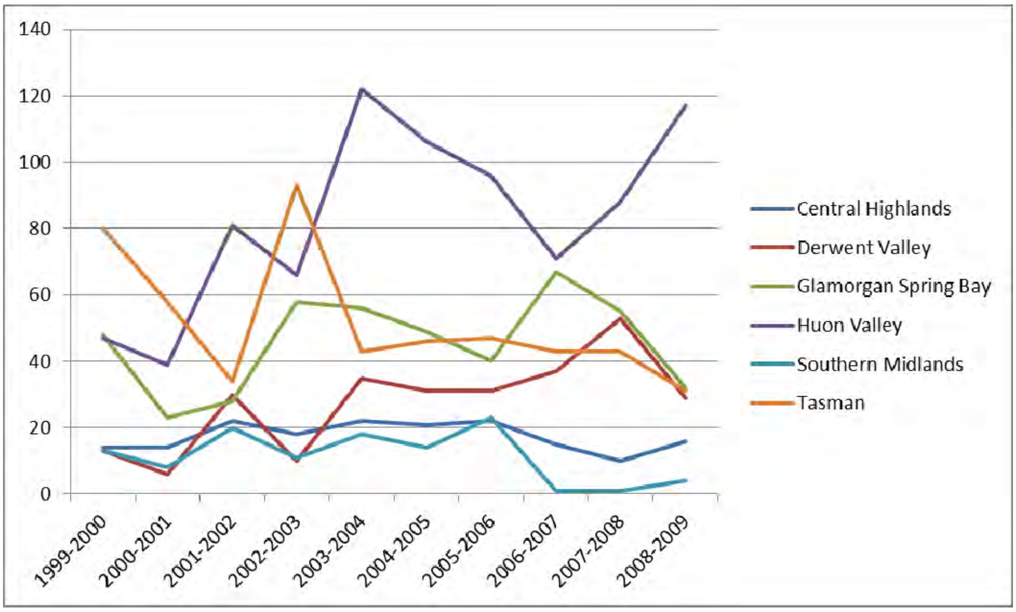

Figure 53: No. of Dwelling Approvals by LGA for Remainder of Southern Region, 2000 – 2009 *(Source: ABS Building Approvals)*

Despite both Clarence and Kingborough equally dominating new residential dwelling approvals over the past 10 years, growth within these local government areas has occurred in very different spatial patterns when analysing new dwelling approvals on a state suburb basis. Growth within Kingborough has been heavily focussed in the suburbs of Kingston, Blackmans Bay and Margate. Kingston alone has seen nearly 9% of all total new dwellings constructed within the region in the last 10 years. This is nearly double Brighton (state suburb) which was the second most intense suburb in terms of residential building activity. Clear physical evidence of the expansion of Kingston can be seen along the Summerleas Road corridor.

In comparison, residential dwelling construction in Clarence was spread across a greater number of suburbs, in a mix of urban, low density and rural residential areas. The suburbs in Clarence with the greatest number of residential dwelling approvals across the last 10 years included Tranmere, Howrah, Oakdowns, Geilston Bay & Acton Park.

In the other LGAs comprising Greater Hobart, residential dwelling approvals also occurred across a few key suburbs. The suburbs with the greatest level of dwelling construction in the past 10 years are however predominantly on the urban fringe. The top 10 suburbs were:

- Kingston (1012 new dwellings)
- Brighton (554 new dwellings)
- Margate (436 new dwellings)
- Howrah (337 new dwellings)
- Blackmans Bay (301 new dwellings)
- Old Beach (271 new dwellings)
- Claremont (264 new dwellings)
- Tranmere (256 new dwellings)
- Glenorchy (234 new dwellings)
- Sorell (223 new dwellings)

Outside of Greater Hobart the township of Huonville saw the highest number of new dwelling approvals across the last 10 years with 171 new dwelling. Forcett was next with 123 new dwellings, followed by White Beach with 116 new dwellings (if combined with Nubeena then 183 new dwellings making it the settlement outside of Greater Hobart with the greatest growth pressure), Coles Bay with 111 new dwellings and Eaglehawk Neck with 105 new dwellings.

Beyond the state suburbs which are in commuter distance of major employment centres within Greater Hobart, new dwelling approvals primarily occurred in coastal areas, reflecting the construction of dwellings for sea-changers and holiday homes.

Table 24: Residential Dwelling Approvals by Local Government Area, 1999 – 2009 *(Source: ABS Building Approvals)*

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	Total	% of Regional Total	Annual Average
Brighton	64	24	65	65	145	127	147	147	143	169	**1096**	9.44%	109.6
Central Highlands	14	14	22	18	22	21	22	15	10	16	**174**	1.50%	17.4
Clarence	169	98	214	239	303	258	272	241	254	317	**2365**	20.37%	236.5
Derwent Valley	13	6	30	10	35	31	31	37	53	29	**275**	2.37%	27.5
Glamorgan Spring Bay	48	23	28	58	56	49	40	67	55	32	**456**	3.93%	45.6
Glenorchy	76	45	111	126	166	119	132	245	136	124	**1280**	11.02%	128
Hobart	106	78	122	150	143	113	96	93	119	71	**1091**	9.40%	109.1
Huon Valley	47	39	81	66	122	106	96	71	88	117	**833**	7.17%	83.3
Kingborough	182	125	225	283	291	188	271	327	244	274	**2410**	20.76%	241
Sorell	52	46	77	82	139	117	101	134	118	133	**999**	8.60%	99.9
Southern Midlands	13	8	20	11	18	14	23	1	1	4	**113**	0.97%	11.3
Tasman	80	58	34	93	43	46	47	43	43	31	**518**	4.46%	51.8
Totals	**864**	**564**	**1029**	**1201**	**1483**	**1189**	**1278**	**1421**	**1264**	**1317**	**11610**	**100.00%**	**1161**

Table 25: Residential Dwelling Approvals by State Suburb for Greater Hobart, 1999 – 2009 *(Source: ABS Building Approvals)*

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	Total	% of Regional Total	Annual Average
Acton Park	26	11	11	28	40	23	27	23	23	15	**227**	1.96%	22.7
Allens Rivulet	0	0	0	0	0	0	0	1	4	2	**7**	0.06%	0.7
Austins Ferry	11	2	22	22	45	39	23	35	16	11	**226**	1.95%	22.6
Battery Point	1	0	0	4	1	8	0	1	0	0	**15**	0.13%	1.5
Bellerive	12	6	8	4	23	10	15	11	7	10	**106**	0.91%	10.6
Berriedale	6	7	12	15	18	4	4	6	3	1	**76**	0.65%	7.6
Blackmans Bay	42	28	48	45	33	16	20	24	25	24	**305**	2.63%	30.5
Bonnet Hill	8	4	8	6	5	2	4	2	4	3	**46**	0.40%	4.6
Bridgewater	1	1	3	0	2	2	12	14	11	16	**62**	0.53%	6.2
Brighton	26	16	30	32	89	57	68	70	84	92	**564**	4.86%	56.4
Cambridge	6	6	10	4	5	5	9	13	16	18	**92**	0.79%	9.2
Carlton	1	1	5	7	15	12	7	15	8	18	**89**	0.77%	8.9
Chigwell	2	0	0	4	2	3	0	7	0	1	**19**	0.16%	1.9
Claremont	12	7	16	17	26	25	53	66	29	23	**274**	2.36%	27.4
Clarendon Vale	0	0	0	0	0	0	0	3	0	9	**12**	0.10%	1.2
Clifton Beach	3	4	9	2	8	2	2	1	6	2	**39**	0.34%	3.9
Collinsvale	4	2	3	5	6	1	2	19	9	9	**60**	0.52%	6
Cremorne	0	2	10	1	3	2	3	0	7	4	**32**	0.28%	3.2
Derwent Park	0	0	0	0	0	0	0	0	3	1	**4**	0.03%	0.4
Dodges Ferry	4	11	11	7	10	14	24	21	23	17	**142**	1.22%	14.2

Dromedary	3	0	7	11	5	4	4	3	2	2	**41**	0.35%	4.1
Dynnyrne	8	6	24	45	66	14	8	1	2	1	**175**	1.51%	17.5
Fern Tree	0	3	5	1	3	1	0	2	2	4	**21**	0.18%	2.1
Gagebrook	0	0	0	0	0	0	6	1	8	3	**18**	0.16%	1.8
Geilston Bay	13	7	13	23	25	9	26	29	30	26	**201**	1.73%	20.1
Glebe	0	0	0	0	3	0	0	0	0	0	**3**	0.03%	0.3
Glenorchy	11	14	21	20	21	17	9	47	31	43	**234**	2.02%	23.4
Goodwood	0	0	0	0	0	0	0	0	0	0	**0**	0.00%	0
Granton	18	7	26	24	25	11	17	33	21	14	**196**	1.69%	19.6
Hobart	1	1	0	0	0	5	2	3	1	0	**13**	0.11%	1.3
Honeywood	15	0	6	10	23	17	12	14	11	10	**118**	1.02%	11.8
Howden	4	5	2	4	6	5	5	8	5	4	**48**	0.41%	4.8
Howrah	24	8	33	34	29	35	33	23	56	62	**337**	2.90%	33.7
Huntingfield	13	10	8	2	0	0	0	0	0	0	**33**	0.28%	3.3
Kingston	51	41	78	147	133	65	102	148	128	126	**1019**	8.78%	101.9
Kingston Beach	4	5	2	5	8	5	3	7	3	3	**45**	0.39%	4.5
Lauderdale	10	5	10	7	5	0	3	2	0	0	**42**	0.36%	4.2
Lenah Valley	15	15	22	23	15	18	16	1	11	9	**145**	1.25%	14.5
Leslie Vale	7	3	5	4	3	2	7	3	2	0	**36**	0.31%	3.6
Lewisham	3	4	5	8	10	10	5	5	8	5	**63**	0.54%	6.3
Lindisfarne	8	3	15	10	25	17	16	11	7	14	**126**	1.09%	12.6
Longley	1	0	0	0	0	4	0	0	0	0	**5**	0.04%	0.5
Lutana	0	0	1	0	2	1	1	4	2	2	**13**	0.11%	1.3
Margate	19	11	33	33	45	62	78	63	55	49	**448**	3.86%	44.8
Midway Point	4	2	0	4	9	3	7	12	20	38	**99**	0.85%	9.9

Montagu Bay	2	0	1	1	4	1	0	3	3	2	**17**	0.15%	1.7
Montrose	2	0	1	3	2	1	3	2	1	1	**16**	0.14%	1.6
Moonah	2	2	4	4	2	2	9	12	2	3	**42**	0.36%	4.2
Mornington	5	1	1	1	12	17	4	1	1	17	**60**	0.52%	6
Mount Nelson	14	4	12	3	3	5	8	4	10	3	**66**	0.57%	6.6
Mount Stuart	3	1	9	9	6	8	7	1	7	2	**53**	0.46%	5.3
New Town	1	1	1	7	0	6	2	2	7	2	**29**	0.25%	2.9
North Hobart	0	0	2	2	1	1	4	13	1	1	**25**	0.22%	2.5
Oakdowns	0	0	6	13	6	39	25	39	16	30	**174**	1.50%	17.4
Old Beach	17	7	18	10	20	46	41	43	26	44	**272**	2.34%	27.2
Opossum Bay	2	4	3	2	3	7	8	7	3	6	**45**	0.39%	4.5
Otago	5	3	7	11	2	3	1	2	1	2	**37**	0.32%	3.7
Penna	1	0	7	6	7	6	11	15	9	5	**67**	0.58%	6.7
Primrose Sands	3	6	7	8	14	12	14	13	9	13	**99**	0.85%	9.9
Richmond	14	14	14	22	18	11	25	11	14	8	**151**	1.30%	15.1
Ridgeway	15	14	2	0	2	0	1	3	4	1	**42**	0.36%	4.2
Risdon Vale	0	0	0	1	1	1	3	1	0	1	**8**	0.07%	0.8
Rokeby	0	3	0	1	2	5	15	22	7	28	**83**	0.71%	8.3
Rose Bay	0	0	9	3	1	10	0	1	3	5	**32**	0.28%	3.2
Rosetta	5	3	2	4	11	8	4	5	14	3	**59**	0.51%	5.9
Rosny	0	0	0	1	1	1	0	0	2	0	**5**	0.04%	0.5
Rosny Park	3	0	4	0	0	0	0	0	0	0	**7**	0.06%	0.7
Sandford	15	9	14	19	23	13	5	10	14	6	**128**	1.10%	12.8
Sandy Bay	17	14	23	19	20	10	15	17	25	17	**177**	1.52%	17.7
Seven Mile Beach	2	2	3	2	2	3	2	4	4	4	**28**	0.24%	2.8

Sorell	15	9	19	15	32	27	14	40	29	23	**223**	1.92%	22.3
South Arm	5	0	5	4	9	6	9	7	7	7	**59**	0.51%	5.9
South Hobart	15	4	7	6	9	7	6	7	13	8	**82**	0.71%	8.2
Tea Tree	3	1	2	3	7	2	6	3	2	3	**32**	0.28%	3.2
Tinderbox	8	4	14	7	7	2	2	3	1	1	**49**	0.42%	4.9
Tolmans Hill	0	0	0	0	0	0	0	3	10	3	**16**	0.14%	1.6
Tranmere	16	6	21	42	55	26	28	13	20	35	**262**	2.26%	26.2
Warrane	0	5	9	5	3	13	16	5	8	8	**72**	0.62%	7.2
West Hobart	10	9	10	14	5	5	6	2	2	6	**69**	0.59%	6.9
West Moonah	4	2	4	9	7	8	8	10	6	13	**71**	0.61%	7.1
TOTALS	**601**	**386**	**763**	**875**	**1089**	**842**	**935**	**1076**	**964**	**1002**	**8533**	**73.50%**	**813.2**

Table 26: Residential Dwelling Approvals by State Suburb for Remainder of Southern Region, 1999 – 2009 *(Source: ABS Building Approvals)*

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	Total	% of Regional Total	Annual Average
Adventure Bay	2	2	3	3	6	3	4	6	0	0	**29**	0.25%	2.9
Alonnah	2	1	6	9	8	5	7	6	0	9	**53**	0.46%	5.3
Bagdad	0	1	8	2	5	0	1	0	0	0	**17**	0.15%	1.7
Bicheno	5	4	6	9	8	8	4	15	5	6	**70**	0.60%	7
Boomer Bay	3	0	3	2	0	3	1	0	0	0	**12**	0.10%	1.2
Bothwell	0	0	0	0	1	0	0	0	1	1	**3**	0.03%	0.3
Brandum	0	0	1	0	0	1	0	0	0	0	**2**	0.02%	0.2
Buckland	2	1	1	2	1	0	0	0	1	0	**8**	0.07%	0.8
Bushy Park	0	0	0	0	0	1	3	0	0	0	**4**	0.03%	0.4
Campania	3	2	3	3	1	4	5	0	0	0	**21**	0.18%	2.1
Colebrook	0	0	1	0	3	1	2	0	0	0	**7**	0.06%	0.7
Coles Bay	16	6	7	15	13	15	8	14	13	4	**111**	0.96%	11.1
Coningham	0	0	0	0	0	0	0	3	3	2	**8**	0.07%	0.8
Cradoc	5	3	6	7	9	6	4	1	6	2	**49**	0.42%	4.9
Cranbrook	0	0	0	0	1	0	0	1	0	0	**2**	0.02%	0.2
Cygnet	3	1	5	10	13	6	5	6	2	8	**59**	0.51%	5.9
Dee	3	3	5	3	1	2	3	2	2	4	**28**	0.24%	2.8
Deep Bay	1	2	4	2	6	4	1	6	4	2	**32**	0.28%	3.2
Dennes Point	4	3	4	8	10	4	11	7	0	0	**51**	0.44%	5.1
Dolphin Sands	6	2	4	6	6	1	3	4	3	1	**36**	0.31%	3.6

Dover	4	3	8	6	13	7	7	4	13	10	**75**	0.65%	7.5
Dunalley	1	0	2	1	3	0	1	0	0	0	**8**	0.07%	0.8
Dysart	2	0	3	1	1	4	3	0	0	0	**14**	0.12%	1.4
Eaglehawk Neck	15	19	6	19	7	7	8	10	7	7	**105**	0.90%	10.5
Eggs And Bacon Bay	2	1	3	4	1	6	1	1	1	5	**25**	0.22%	2.5
Electrona	1	0	0	0	0	5	2	17	11	13	**49**	0.42%	4.9
Ellendale	0	0	2	1	1	1	1	1	2	3	**12**	0.10%	1.2
Forcett	10	9	7	11	30	18	14	8	6	10	**123**	1.06%	12.3
Franklin	2	3	11	5	6	10	10	4	10	12	**73**	0.63%	7.3
Glen Huon	1	4	6	2	6	1	4	7	2	8	**41**	0.35%	4.1
Gretna	0	0	2	1	3	0	2	0	1	1	**10**	0.09%	1
Grove	4	0	5	6	8	10	7	2	3	7	**52**	0.45%	5.2
Hamilton	1	0	0	0	0	0	0	0	0	0	**1**	0.01%	0.1
Highcroft/Stormlea	1	0	0	1	3	0	0	1	1	0	**7**	0.06%	0.7
Huonville	7	7	7	19	9	26	22	34	25	15	**171**	1.47%	17.1
Interlaken	0	2	0	0	0	0	1	0	0	2	**5**	0.04%	0.5
Judbury	2	1	3	1	2	4	4	1	4	5	**27**	0.23%	2.7
Kellevie	0	1	4	0	4	6	1	0	0	0	**16**	0.14%	1.6
Kempton	1	2	0	1	3	2	2	0	0	0	**11**	0.09%	1.1
Kettering	9	6	11	4	16	5	10	7	0	10	**78**	0.67%	7.8
Koonya	5	4	1	0	0	0	1	0	1	3	**15**	0.13%	1.5
Lachlan	0	0	6	0	3	2	6	5	11	7	**40**	0.34%	4
Lower Longley	4	2	4	3	4	0	5	0	1	2	**25**	0.22%	2.5
Lucaston	2	3	6	1	6	6	10	3	6	6	**49**	0.42%	4.9
Lymington	1	0	2	2	2	4	2	3	3	7	**26**	0.22%	2.6

Magra	4	2	2	2	4	7	5	2	6	4	**38**	0.33%	3.8
Mangalore	5	0	3	3	4	0	0	0	0	0	**15**	0.13%	1.5
Maydena	0	0	0	0	0	0	0	0	0	0	**0**	0.00%	0
Middleton	2	1	1	5	4	5	5	5	0	6	**34**	0.29%	3.4
Miena	6	3	9	8	6	11	6	3	2	8	**62**	0.53%	6.2
Molesworth	0	1	3	2	7	12	5	16	16	12	**74**	0.64%	7.4
Mountain River	2	2	2	3	2	4	1	4	2	3	**25**	0.22%	2.5
Murdunna	8	5	5	14	3	4	7	8	8	0	**62**	0.53%	6.2
National Park	0	0	0	0	0	0	0	1	0	0	**1**	0.01%	0.1
New Norfolk	8	3	17	5	17	9	7	10	16	4	**96**	0.83%	9.6
Nicholls Rivulet	2	3	4	1	6	3	4	3	2	2	**30**	0.26%	3
Nubeena	13	3	2	16	7	1	6	3	10	6	**67**	0.58%	6.7
Oatlands	1	1	2	1	1	2	5	0	0	0	**13**	0.11%	1.3
Orford	13	3	2	8	9	7	8	17	18	10	**95**	0.82%	9.5
Orielton	7	3	7	13	5	6	4	5	6	4	**60**	0.52%	6
Ouse	0	0	0	0	0	0	0	1	1	0	**2**	0.02%	0.2
Oyster Cove	3	0	0	0	0	2	1	1	1	2	**10**	0.09%	1
Parattah	0	0	0	0	0	0	1	0	0	0	**1**	0.01%	0.1
Pawtella	0	0	0	0	0	0	0	0	0	0	**0**	0.00%	0
Pelverata	0	1	1	0	3	1	3	6	0	1	**16**	0.14%	1.6
Plenty	0	0	0	0	0	0	1	1	0	0	**2**	0.02%	0.2
Port Arthur	5	12	5	6	4	24	4	3	3	3	**69**	0.59%	6.9
Port Huon	0	4	2	2	11	4	3	6	5	13	**50**	0.43%	5
Premaydena	4	0	2	1	1	1	2	0	0	1	**12**	0.10%	1.2
Ranelagh	2	0	1	5	5	9	7	3	14	9	**55**	0.47%	5.5

Reynolds Neck	0	0	0	0	0	0	2	1	1	2	**6**	0.05%	0.6
Rosegarland	1	0	0	0	1	0	0	1	2	1	**6**	0.05%	0.6
Saltwater River	5	2	1	6	2	4	2	1	1	2	**26**	0.22%	2.6
Sloping Main	0	1	1	3	3	1	4	0	0	2	**15**	0.13%	1.5
Snug	2	2	3	2	8	1	7	16	3	20	**64**	0.55%	6.4
Southport	1	3	3	1	7	4	3	1	2	3	**28**	0.24%	2.8
Spring Beach	3	3	3	5	5	3	3	3	3	0	**31**	0.27%	3.1
Swansea	3	4	4	11	11	6	7	8	8	8	**70**	0.60%	7
Taranna	2	5	2	3	0	2	5	3	2	0	**24**	0.21%	2.4
Triabunna	0	0	1	2	2	9	7	5	4	3	**33**	0.28%	3.3
Tunbridge	0	0	0	0	0	0	1	0	0	0	**1**	0.01%	0.1
Tunnack	1	0	0	0	0	1	0	0	0	0	**2**	0.02%	0.2
Verona Sands	2	0	1	2	2	4	3	3	2	3	**22**	0.19%	2.2
Wayatinah	0	0	0	0	0	1	0	1	0	0	**2**	0.02%	0.2
Westerway	0	0	0	0	0	0	2	1	1	0	**4**	0.03%	0.4
White Beach	22	7	9	24	13	2	8	14	10	7	**116**	1.00%	11.6
Wilburville	4	8	4	6	13	5	10	7	2	0	**59**	0.51%	5.9
Woodbridge	2	0	0	1	1	4	6	1	0	1	**16**	0.14%	1.6
Woodsdale	0	0	1	0	0	0	2	0	0	0	**3**	0.03%	0.3
TOTALS	**263**	**180**	**269**	**331**	**390**	**347**	**343**	**343**	**299**	**312**	**3077**	**26.50%**	**307.7**

5.3 Value of Residential Building & Non-Residential Approvals

Consistent with the volume of residential building approvals, the annual value of new residential building approvals against that in the North-West and Northern regions is greater. Proportionally however the value of new residential in Southern Tasmania against the number of approvals is greater than the other regions. This trend is also consistent with additions to residential dwellings reflecting the broader affluence of Southern Tasmania.

Such value trends are not however evident across non-residential approvals, as values of non-residential approvals is not related to the general affluence of the population but rather the type of economic activity occuring in that region.

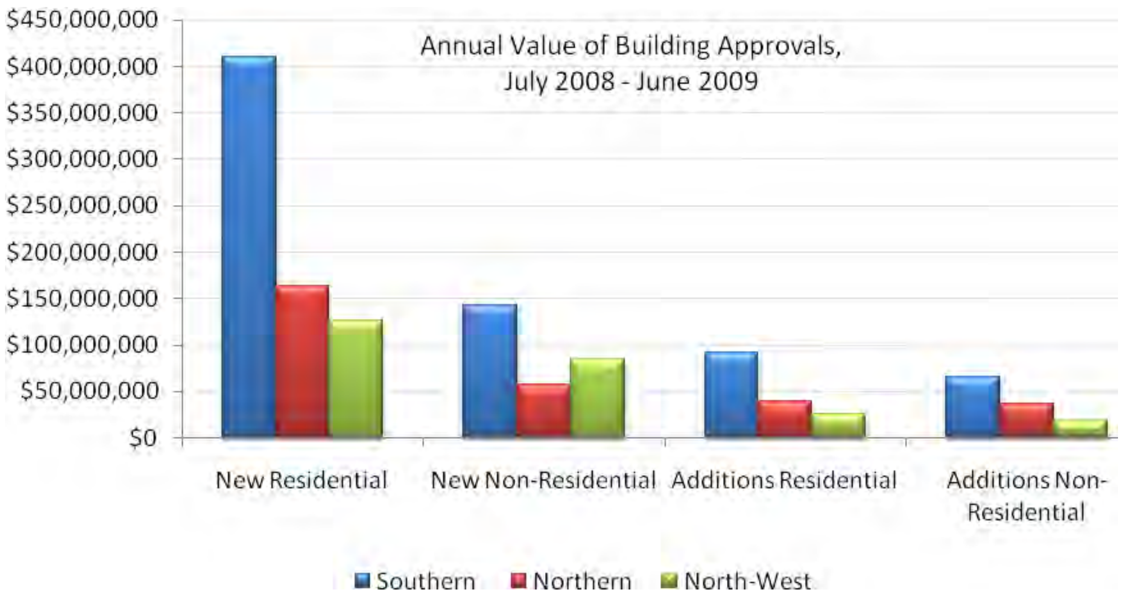

Figure 54: Annual Value of Building Approvals by Sector for Tasmania, 2008 – 2009 *(Source: ABS Building Approvals)*

Average values of new dwelling approvals (Figure 56) show that Hobart (LGA) had the highest average construction value per dwelling than all other LGAs in Southern Tasmania. Clarence, Glenorchy and Kingborough had the next highest average construction value per dwelling followed by Brighton, Glamorgan Spring Bay, Huon Valley, Sorell and Southern Midlands. Central Highlands, Derwent Valley and Tasman have the lowest average construction value per dwelling.

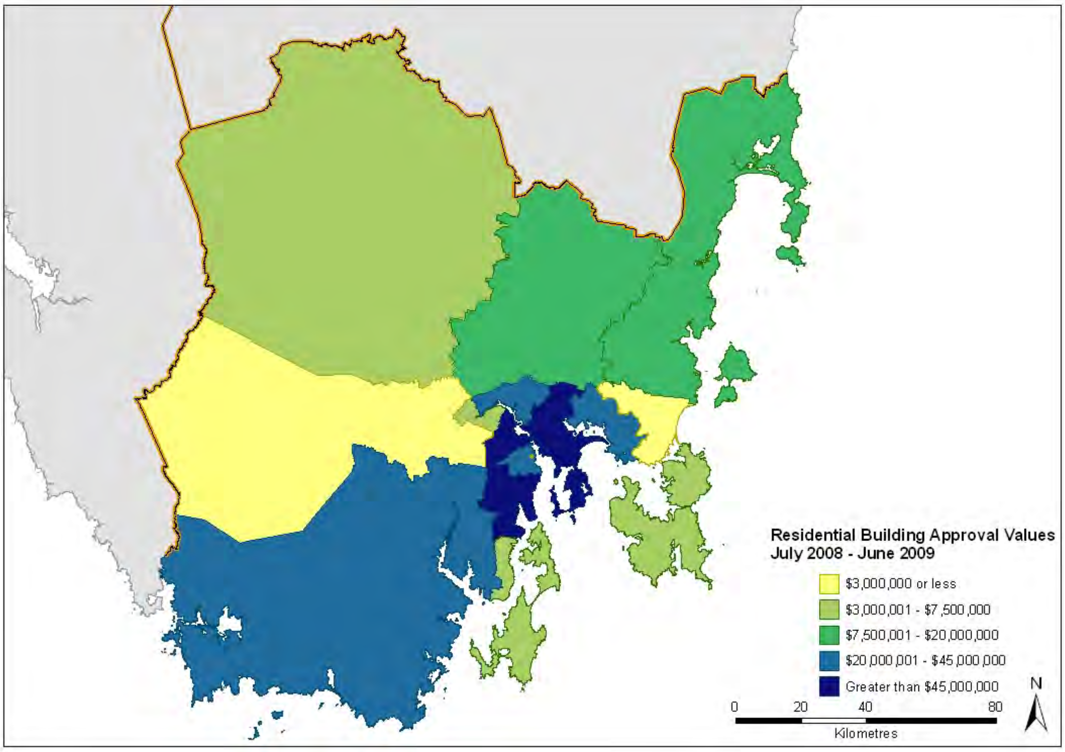

Figure 55: Total Value of Residential Building Approvals by SLA for Southern Tasmania, 2008-2009 *(Source: ABS Building Approvals)*

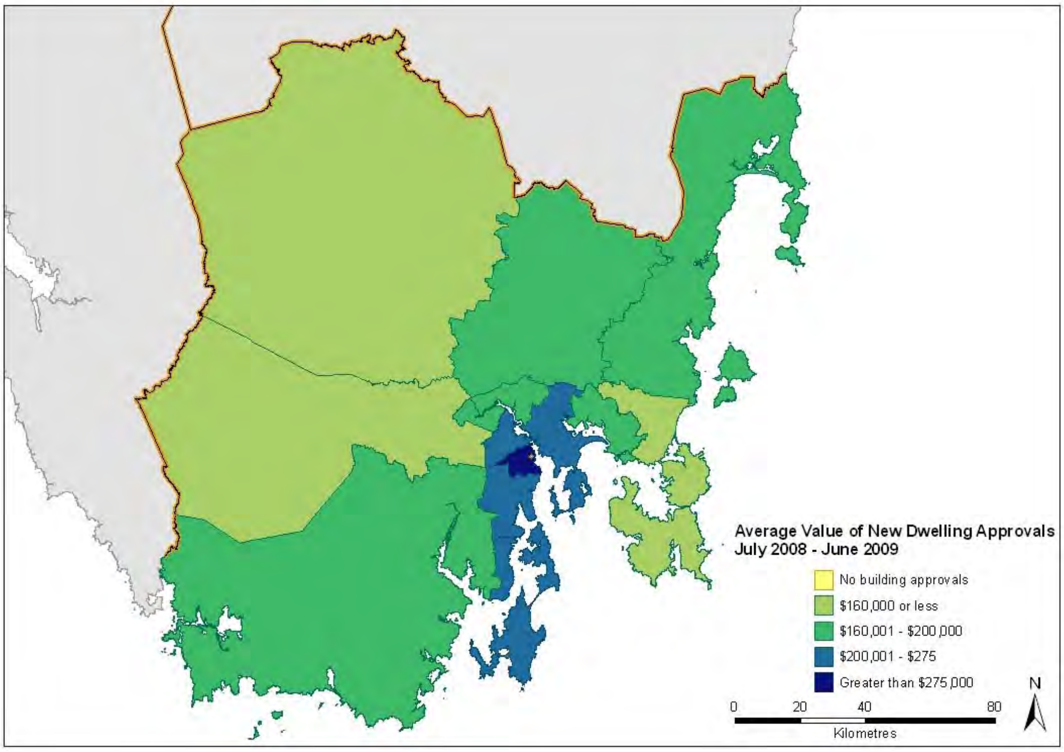

Figure 56: Average Value of Dwelling Approvals by SLA for Southern Tasmania, 2008-2009 *(Source: ABS Building Approvals)*

5.4 Value Comparison over Time

Figures 57 and 58 show the value of New Residential and Additions to Residential against non-residential in Southern Tasmania from 2000 to 2009. Notably the value of residential against non-residential is consistently higher, particularly in terms of new residential, indicating that the construction industry in Southern Tasmania is geared towards residential development.

Peaks in the value of non-residential developments occur in sharp spikes which most likely relates to the approval of one or two major commercial developments within the region at a particular point in time.

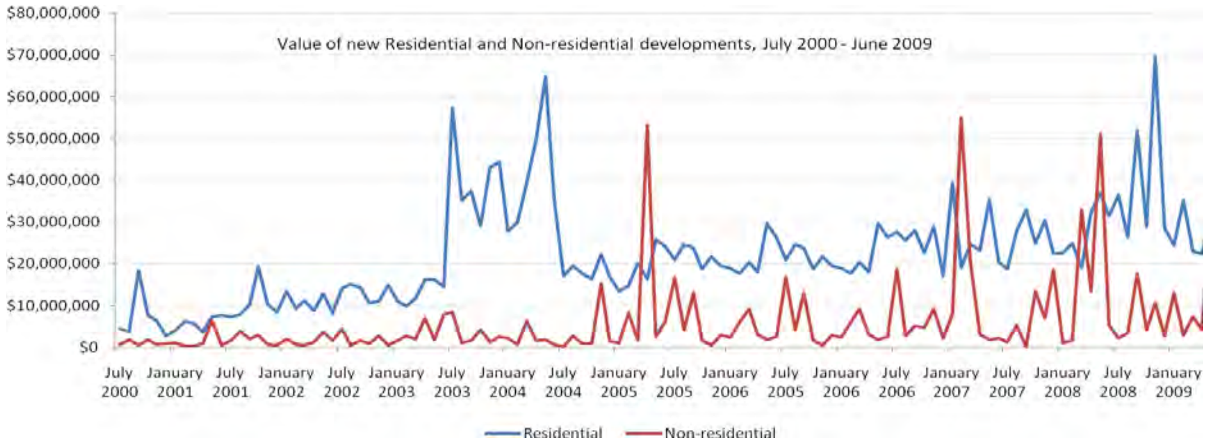

Figure 57: Value of New Residential and Non-Residential for Southern Tasmania, 2000 – 2009 *(Source: ABS Building Approvals)*

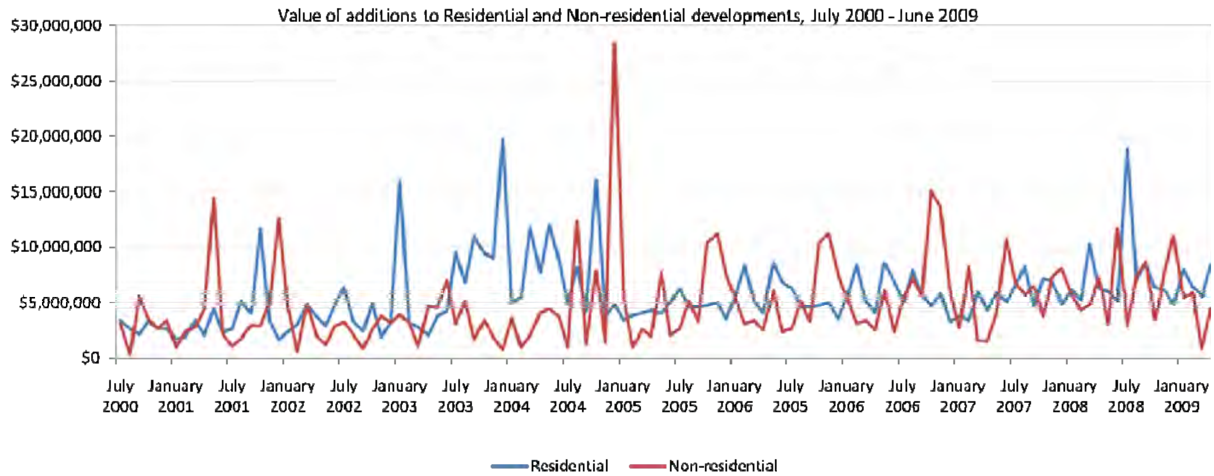

Figure 58: Value of Additions to Residential and Non-Residential for Southern Tasmania, 2000 – 2009 *(Source: ABS Building Approvals)*

5.5 Average Floor Areas

It is well recognised that there has been a national trend towards building bigger houses. Australia has now the largest average floor area per dwelling than any other developed nation with an average floor area size of 248 square metres (an increase of 9.0% over the last 10 years) (ABS Building Approvals 2010). Average floor areas for new dwellings in Tasmania is now the lowest of any State with an average size of 196 square metres. Trends across the last 10 years are shown in Figure 59 below.

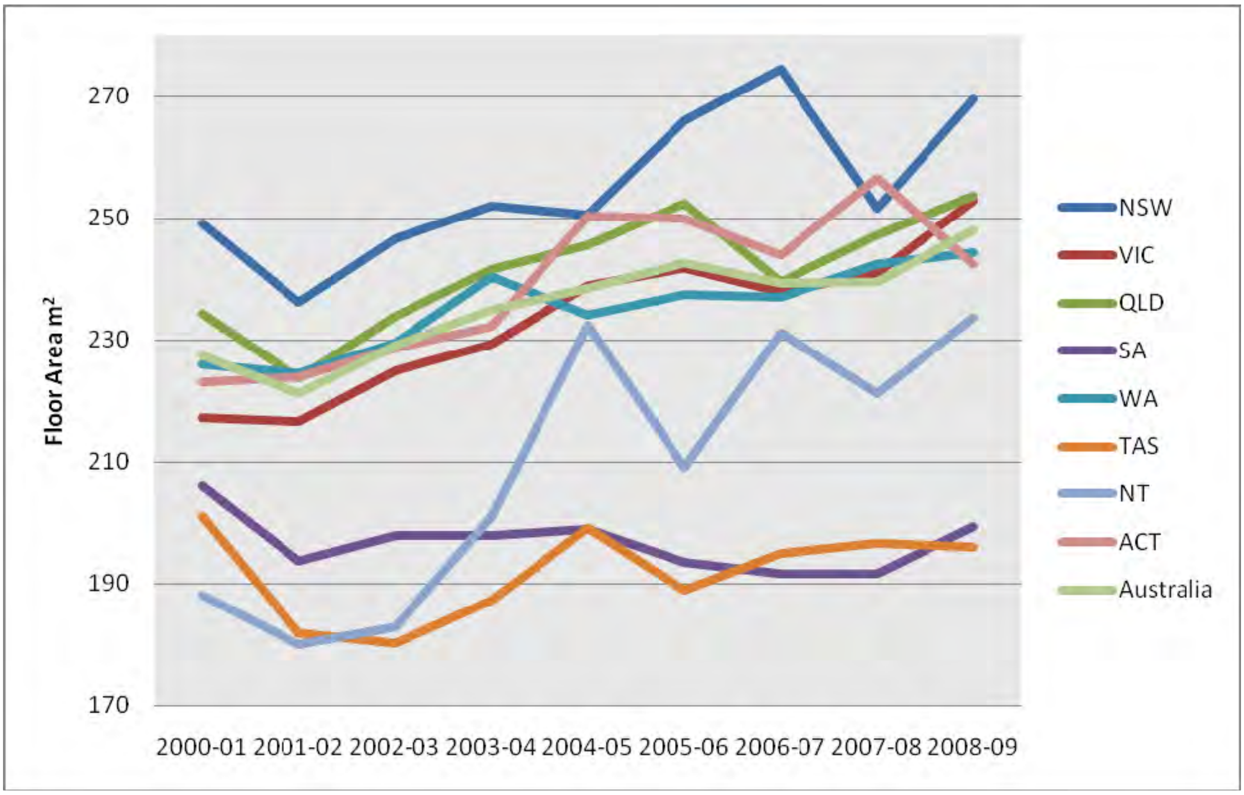

Figure 59: Average Floor Area of New Houses by State and Territory, 2000 – 2009 *(Source: ABS Building Approvals)*

5.6 Population Growth Comparison

Comparing new residential development approvals against population growth can provide an indication of the drivers of residential development, particularly when it is considered against the current average household size in the region of 2.4 persons per dwelling.

Table 27 provides a comparison of new dwelling approvals across the 9 year period from 2000 to 2008 with population growth for each LGA, Greater Hobart, the remainder of the region and at the regional level.

The complexity in the growth of new residential development is evident. There is physical evidence across all of Southern Tasmania of the extent of dwelling growth. The urban area of Greater Hobart has continued to expand, some coastal settlements have noticeably increased in size while there are further areas of rural residential development. At the same time statistics shows that there has been a relatively low but steady population growth.

If the main driver of dwelling growth was population growth the average number of new dwellings per person should be close to 2.4 persons per dwelling. With the exception of Brighton, Derwent Valley and

Southern Midlands where it would appear that population growth has not been the predominant driver of dwelling growth.

It would be expected that Central Highlands, Glamorgan Spring Bay and Tasman have lower averages due to the greater number of second homes constructed in these key holiday areas. However Glenorchy, followed by Clarence also have low averages and both of these LGAs are predominantly urban. Glenorchy in particularly is unlikely to be locationally desirable for holiday homes. The difference in averages indicates that demographic change is also a key driver of dwelling growth.

Table 27: Comparison between dwelling approvals and population growth for Southern Tasmania by LGA, 2000 – 2008 *(Source: ABS Estimated Residential Population and Building Approvals)*

	Residential Dwelling Approvals 2000-2008	Population Growth 2000- 2008	Average no. of new dwellings per person
Brighton	1,008	2,283	2.26
Central Highlands	146	23	0.16
Clarence	2,098	1,912	0.91
Derwent Valley	256	547	2.14
Glamorgan Spring Bay	385	475	1.23
Glenorchy	1,159	430	0.37
Hobart	1,063	2,165	2.04
Huon Valley	747	1,012	1.35
Kingborough	2,103	3,408	1.62
Sorell	901	1,791	1.99
Southern Midlands	92	204	2.22
Tasman	487	58	0.12
Total	**9883**	**14,308**	**1.45**

Southern Tasmania
REGIONAL PLANNING PROJECT

The Southern Tasmania Regional Planning Project
is a joint initiative of the State of Tasmania, the Southern Tasmanian Councils Authority,
the 12 Southern Councils and the Sullivans Cove Waterfront Authority