MCa

Economic Development Strategy

Break O'Day Council
Municipal Management Plan

August 2013

Economic Development Strategy

Break O'Day LGA

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August 2013

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Executive Summary

This report provides an economic development strategy for Break O'Day LGA. It outlines major indicators and trends and identifies key issues for the region and for future economic development.

Population

ABS Census 2011 data highlights a number of key features of the Break O'Day LGA:

- Size - the population is relatively small, at around 6000 persons in 2011.
- Growth - the period 2001-2006 was one of growth but the population was largely static between 2006 and 2011.
- Location - the population is focused in coastal locations (home to 65% of residents). St Helens/Stieglitz is the major regional centre (with 35% of the population); other main centres are St Marys (13%) and Scamander (12%).
- Holiday homes - represent around 38% of dwellings (1607). The downturn in the economy over the last 3 years has seen a number of holiday houses being put on the market.[1]
- The population is ageing, with an increase in persons aged 55 and over and some younger persons (aged 25-44 years and mainly family groups) have been leaving the area. This trend has accelerated in the 5 years to 2011. Departures are primarily related to education requirements and limited full time jobs in the region.
- In the last 10 years persons aged 55 and over increased from 31% of the population to 41% in 2011. Reflecting this ageing, the median age increased from 43 years in 2001 to 49 years in 2011. The average household size has declined from 2.3 persons to 2.1 persons.
- Labour force participation rates are generally lower than other in areas, reflecting this older age structure of the population (including some early retirements).

These characteristics have been exacerbated by slow down over the last 5 years covering: limited growth in full time jobs (and no overall growth in male full time jobs); and a loss of jobs in several of the key resource industries (that have historically been a key part of the local economy).

Trends over the last 2 years are linked to the impacts of a slow economy and weakening visitor market on businesses in the area. Long term projections are for continued growth in Break O'Day's population, as people are attracted to the coastal lifestyle. However given the static population numbers in the last 5 years, the long term targets are unlikely to be achieved and will need to be revised.[2]

1 Local discussions indicate that around 30% of the holiday housing stock is owned by persons from mainland Australia (ie. 450-500 houses) with the remaining owners mainly persons resident in Launceston, Hobart or some inland areas.

2 The Demographic Change Advisory Council has prepared projections for all Tasmanian LGAs for the period to 2031. Break O Day was projected to increase population by 20% between 2011 and 2031. These projections will not be realised with the recent slowdown in population growth. Based on the lower population figure of 6000 in 2011 and if the projected growth rate of 20% applied then the resident population would be 7200 in 2031 (compared with the projection of 7908).

Regional Economy

The regional economy has a number of characteristics and trends, which have impacted on the number of jobs in the LGA. It has moved from a growth period (2001-06) to a slowdown (2006-11), with a further slowing during 2012/13.

Industries

- The industry base of the area has narrowed and it has become largely a service economy servicing the local/regional population and servicing the visitor market (with St Helens being the main service centre).
- Services - the major areas of employment are in-person services that are servicing a local population (eg. retail, education, health and community services etc.).
- There are limited regional export industries, with major declines in activity and employment in the traditional resource based sectors of agriculture, seafood and forest products.
- Much of industry located in the industrial areas (mainly in St Helens) is light industry servicing local and regional industries (eg. linked to agriculture, mining, building and construction, fishing/boating) or servicing the regional population.
- Tourism is important for St Helens and other locations in the LGA. However the sector has been under pressure with declining visitor numbers (particularly interstate visitors). The sector remains highly dependent on the summer and Easter peak periods.
- Most businesses are small and a large number of these are owner operated with no employees (or family only). The few large employers in the region are in agribusiness, retail, hospitality and health and aged care.
- The recession has impacted on the region, with Break O'Day going from strong growth in the period 2001-2006 to almost no growth in the period 2006-2011.
- The only major industry development in the region is the Hard Rock Coal development, which will generate around 60-70 direct jobs in the construction phase and up to 200 direct jobs when fully operational.
- The job impacts of these industry trends have several dimensions: no increase in jobs that traditionally employ males (except for construction); an increase in service jobs that employ females (eg. health, retail, education); and much of this jobs growth would have been part-time jobs.

Job Trends

In summary the jobs situation has been affected by a number of factors:

- Goods producing industries - a long term decline in resource sectors (forest products and fishing) as a combination of environmental regulation and changes in market situation impact on supply and demand conditions.
- A period of strong population growth (2001-2006) driving demand for in-person services and generating an increase in local employment.
- A growth period for Tasmanian tourism (2001-2006), with increased activity on the East Coast.
- The jobs lost in the traditional sectors were mainly held by males and there has been no growth in male jobs in the period for those displaced (other than an increase in some local manufacturing jobs). The only significant jobs growth in the medium term has been in the areas of services that mainly employ females (eg. health, education, community services etc.) sectors.
- Given a slowdown in two of the major drivers of the regional economy (population and tourism), the regional economy has been flat in the 2006-2011 period.

The state of the economy has led to a shakeout in some local businesses.
There is a clear two-way linkage between population growth and jobs. A loss of jobs and no replacement jobs encourages people/families to move out of the area to other locations that offer job prospects. This outmigration slows the overall growth of the population (and the local market) and has feed-back impacts on local demand for services. The lack of jobs also discourages persons (other than retirees) from moving into the area.

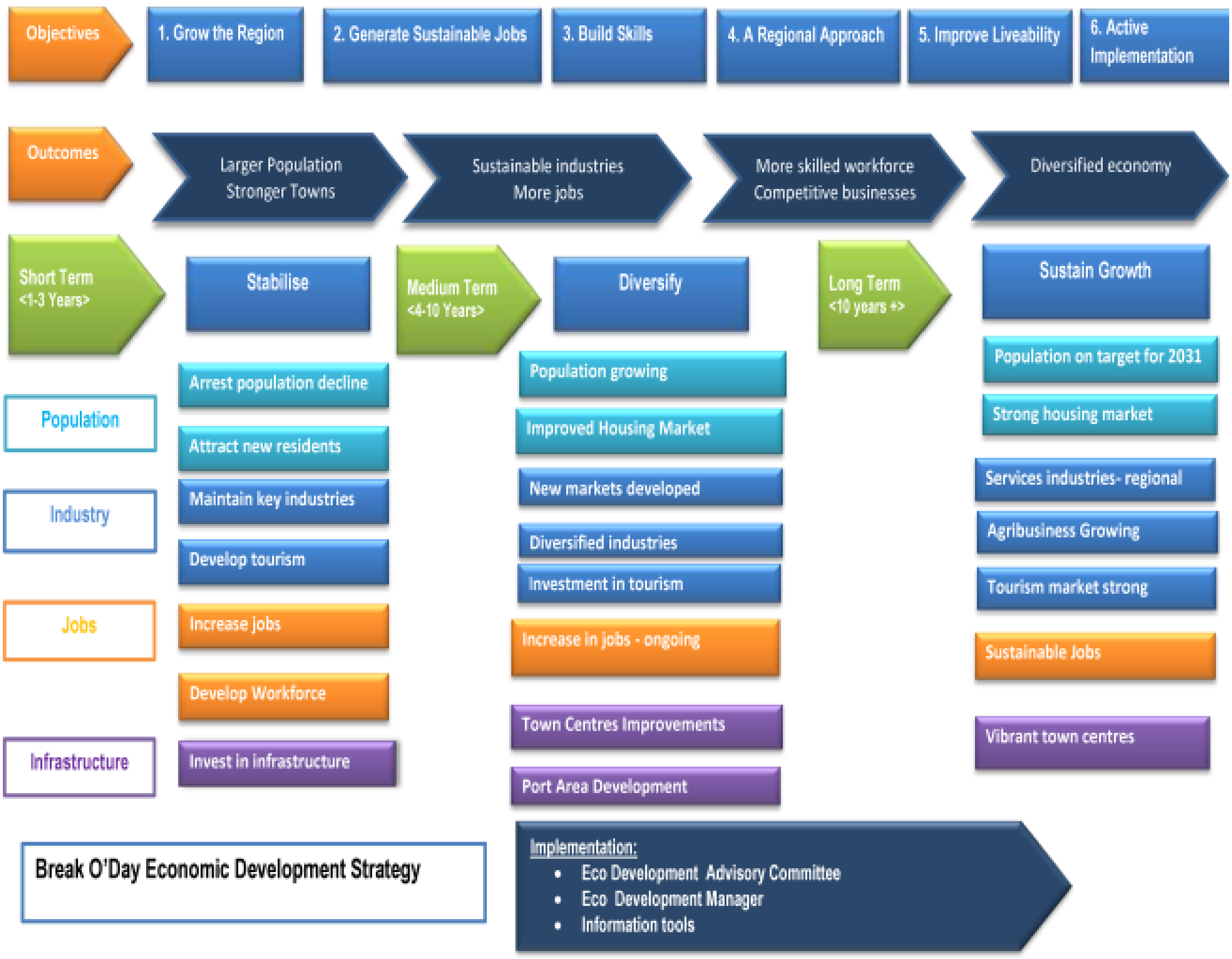
Economic Development Strategy
There are a number of strategic directions in relation to the future development of Break O'Day.

> **In summary, the economic development strategy needs to be focused on: increasing the regional population; diversifying the industry base; developing the tourism market; and increasing the number of local jobs. This requires a broader regional approach (to economic development, business attraction and tourism).**

The economic strategy has a long term horizon of 15-20 years. However it also needs to address short term and medium issues to provide a foundation for sustainable growth. The key objectives are focused on:

1. Growing the region: through encouraging sustainable population growth in the LGA.
2. Generating ongoing sustainable jobs: through growing the economy; building on existing industries; and encouraging new activities.
3. Building skills and a productive workforce.
4. Reinforcing the strategic role of St Helens as a regional service centre.
5. Improving liveability of the towns and villages: through recognising the importance of place; and improving infrastructure and connectivity.

These objectives are consistent with the goals of the broader regional strategy for the Northern Region prepared by the Department of Economic Development, Tourism and the Arts (DEDTA).[3]



3 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P112

Overview - Economic Development Strategy

Objectives and Strategic Directions	Elements and Actions
1.Growing the region	
1.1 Growing the population **<Major Priority>**	**Increasing population growth is fundamental to the future of Break O'Day- the key driver of local business.** • Attracting Residents - action required to promote the region as a place to live and work. • Develop a place brand.
2. Generating ongoing sustainable jobs	
2.1 Strengthening regional industries **< Priority>** 2.2 Attracting new businesses **< Priority>** 2.3 Develop regional tourism **<Major Priority>**	**A targeted approach is required to strengthen and develop key industries.** • Strengthen - environment/resource based industries (eg. fishing, forest products, agriculture, and tourism). These sectors are priority sectors in the Northern Region Plan.[4] • Agribusiness -facilitate diversification in agriculture including vegetables, fruit (eg. berries) and wine and value added food products (vegetables, fruit, wine, cheese). • Develop services businesses in the region. • Attract and develop new businesses. • Tourism – a major priority: take a regional approach to product development, infrastructure and marketing.
3. Building skills and a productive workforce	
3.1 Developing workforce skills **< Priority>** 3.2 Developing small business skills **< Priority>**	**Skills are important for competitive businesses and for future employment opportunities.** There are identified skill gaps in the region, which relate to skilled trades, professions, agribusiness and tourism/ hospitality. • Develop and implement a regional skills strategy in partnership with local businesses. • Link to state level industry skill strategies covering hospitality, agribusiness (regional farm labour pool).[5] • Utilise the Trade Training Centre for regional skills programs. • Develop skills in small business - utilise the *Skilling Small Business for Growth Program* to develop business skills; and the *Digital Ready Program*.
4.Pursuing a regional approach	
4.1 Taking a broader regional economy/markets approach **<Major Priority>** 4.2 Developing St Helens as a service centre **<Major Priority>**	**Break O'Day is part of a broader regional economy.** • Regional Centre - continue to develop St Helens strategic role as a District Town and as regional service centre. • Regional Markets - recognise the extent of regional markets and regional industries in the Northern Region; link to the Northern Tasmania Plan; and collaborate on industry development initiatives and the regional tourism market. • Encourage businesses to expand markets. • Encourage home based businesses and business start-ups, through the Business Enterprise Centre. • Ensure businesses access industry development programs. • Take a leadership role with businesses.
5.Improving liveability of the towns and villages	
5.1. Recognising the importance of place **<Major Priority>** 5.2 Improving infrastructure **<Major Priority>**	**Place is important in terms of attracting residents, businesses and visitors.** Quality of place covers a range of elements including: environment - coastal and hinterland; town centres - design/layout and facilities; precincts - urban and village (St Helens, St Marys); bays /beaches (St Helens and coastal villages) - activation of areas. • Plan the development of town centres • Encourage investment in key locations. • Promotion of Break O'Day as place to live.
	Improved infrastructure is important for economic and community development. It comprises both public and private infrastructure. <Invest in strategic infrastructure>. Economic and community infrastructure includes: • Precincts - improve town centres (eg. St Helens and St Marys). • Develop tourism infrastructure in major centres and in coastal villages/bays. • Improve marine infrastructure (eg. waterfront at St Helens- develop facilities in precinct/ maintain as a commercial port).[6] • Develop bike trails and walking tracks to link areas and for active use of national park areas. • Aerodrome - maintain the facility for potential future long term uses. • Regional links - upgrade of roads linking the north east region to improve tourist access. • Access to the NBN will provide a foundation for service businesses.

4 Agribusiness includes: processed food, dairy, fruit, vegetables, wine and meat, advanced manufacturing (metals, engineering , machinery and equipment.) Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P78

5 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

6 DEDTA has partnered with Marine and Safety Tasmanian (MaST), Tasman, Sorell, Glamorgan Spring Bay and Break O'Day Councils to develop an East Coast Marine Infrastructure Strategy.

Objectives & Strategic Directions	Elements and Actions
6. Taking an active approach to economic development	

6.1 Facilitating economic development
< Major Priority>
	Council needs to play a proactive role in facilitating economic development and future jobs. This includes:
	• A commitment to a clear economic development strategy.
	  ○ Establishing a reputation for encouraging/facilitating business expansion and new business and investment in the region.
	  ○ More active engagement with businesses in the region.
	• Regional Approach
	  ○ Implementation of the State Government's *Regional Planning Initiative* via a responsive planning system at the local level.[7]
	  ○ Involvement with other Councils in the broader region on economic development (on a partner basis and as part of Northern Tasmania Development (NTD)).[8]
	• New structure including: an Economic Development Advisory Committee; and an Economic Development Manager.
	• Working with business and facilitating major development proposals and projects.
	• Developing business cases for new infrastructure and proposals for government funding.

6.2 Information **< Priority>**	**Council needs to have up-to date information available.** • Utilise information in the economic strategy. • Develop a regional prospectus and business content area of website. • Develop template for business cases and submissions. • Conduct annual survey with businesses. • Prepare an annual report on regional economy and strategy progress. • Update information in strategy every 2 years.

Sector Strategies

The economic development strategy has a primary objectives of growing the region (through a larger population and stronger tourism sector) to generate sustainable jobs (in key sectors including services). This growth needs to be supported through improvements in town centres and economic and community infrastructure.

The key elements of the economic development strategy have major impacts on specific industry sectors in the region and at the same time require some supporting actions at an industry level.

The following provides an overview of strategies and actions that are required in each of the sectors. Key priorities are: maintaining and diversifying agribusiness (including value added processing); maintaining fishing activity , developing the port and further developing aquaculture; developing light industry linked to regional markets; redeveloping the tourism market; and maintaining the regional role of St Helens (retail, business services, government funded services - health, education).

7 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P66

8 http://www.northerntasmania.org.au/ (NTD involves the 8 Councils in Northern Tasmania. involves: Break O'Day, Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar)

Summary - Sector Strategies

Resource Based Industries	
A. Agribusiness	**<Work with Industry and DEDTA>**
A.1 Maintain the sector	Maintain and develop major activities in the region (meat, dairy).
A.2 Diversify activity	Diversify - agribusiness in horticulture production: vines and viticulture (cool climate wines)[9]; nurseries and cut flowers; poppies; fruit (eg. berries, cherries, nuts and stone fruit).
A.3 Processing	Develop value added processing of specialist food products.
A.4 Farm gate sales	Food Trail: link activities as part of a regional food and wine trail and make them a focus of tourism promotion.
A.5 Regional approach	Take a broader approach to sector development in partnership with the Northern Region Councils (including Dorset).
A.6 Workforce	Develop a regional workforce strategy covering: a regional farm labour pool; develop of skills training for growers and for value added processing (vegetables, fruit, wine, cheese). [10]
B. Forest Products	**<Work with Industry >**
B.1 Adjusting to change	Major focus on adjusting to change situation (re-skilling displaced persons) and encouraging development of plantation timber.
C. Seafood	**<Work with Industry >**
C.1 Commercial Operations	Maintain St Helens as a commercial port for fishing activity and continue development of aquaculture operations.
C.2 Charter Operations	Extend fishing charter operations (including boat hire).
C.3 Recreational fishing	Continue to develop and promote the area as a recreational fishing hub.
C.4 Infrastructure	Develop port infrastructure: extend and develop the marina and the wharf area and maintain boat servicing capacity.
D Mining	**<Work with Industry >**
D.1 Maximising local benefits	Maximise local benefits through a local workforce, contractors and suppliers.
Goods Producing Industries	
E. Manufacturing	**<Work with Industry and DEDTA >**
E.1 Developing the food sector	Food and Beverages: develop the local industry producing specialist gourmet products (national and export sales; and tourist sales).
E.2 Ensuring growth in light industrial activity	Light Industry: development is linked to future population size (regional) and industry mix (providing support to agribusiness, mining, fishing etc. Planning needs to ensure future industrial sites are available.
E.3 Developing local skills	Skills: a need to address skill issues for industry through regional industry workforce strategies and use of Trade Training Centre (St Helens).
F. Construction	**<Work with Industry and TasTAFE >**
F.1 Growth and future jobs	Growth will be driven by future population growth and housing requirements in Break O'Day and Northern Region.
F.2 Developing workforce skills	Skills: need to develop future skills and link businesses to regional training initiatives for building and construction trades (TasTAFE).
Service Industries	
G. Tourism	**<Work with Industry and ECRTO>**
G.1 Visitors	Build the market: boost visitor numbers (overnight and day) and increase off-season visits.
G.2 Market Segments	Develop specialist markets (eg. conferences, diving, and fishing).
G.3 Tourism Product	Develop product: link the coastal experience and activities - in food trails, cycling, walking trails, diving trails, golf trails, fishing experience; and develop other events for the region.
G.4 Diving	Assess business case for diving wreck (HMAS Tobruk) as part of a regional diving trail.
G.5 Tourism Infrastructure	Improve infrastructure: address gaps in tourist infrastructure and services in the region including: accommodation options; cafes/ restaurants; port area; other facilities and attractions.
G.6 Town Centres	Improvements in town centres will attract visitors and resident shopping.
G.7 Industry Skills	Skills: a need to implement training for employees and small businesses.
H. Retail	**<Work with Industry >**
H.1 Population and Retail Demand	Population size and structure and future growth will be important in maintaining a mixed and sustainable local retail sector. Returning to growth (via resident attraction) is important for the retail sector.
H.2 Servicing the visitor market	Tourism is important for retail businesses. Regional tourism strategy will impact on local retailers.
H.3 Planning retail precinct	Place is important: better planning of town centres and improvements will impact on retail activity and on the retail mix.
I. Business Services	**<Work with Industry >**
I.1 Business growth is required	Regional population/business growth will be important for sustaining a local business services sector.
I.2 St Helens as a regional business centre	St Helens will continue to be a major hub for business services firms that target the broader region.
I.3 A new centre for business	Servicing Broader Markets: Break O'Day is a good location to service other areas of an East Coast market. It is a good location for other specialist professionals seeking a lifestyle change, while still operating a business (eg. in consulting, technical services etc.). NBN will be an enabler for service businesses.
I.4 Professional Workforce	Professionals: there is potential to attract professionals to the area and to market Break O'Day as a lifestyle change location for businesses and professionals.
J. Government Services	**<Work with Industry and Government >**
J.1 Servicing a Regional Population	Population size and structure is important for the maintenance of services and any future expansion in local and regional service delivery. The population of Break O'Day is projected to grow in the longer term, particularly in coastal areas.
J.3 Regional Role	Servicing the region: Break O'Day performs a broader regional role in the delivery of health services (including primary care and some emergency services) and secondary education.
J.4 Professional workforce	Attracting professionals (health, business, and industry): is a major issue for many regional areas (including Break O'Day) .There is a need to develop a workforce attraction plan.
J.5 Funding of services	Future funding: a major issue for the region is future levels of government funding for health services and for other services delivered through local government. There is a need to ensure funding is maintained for regional services.

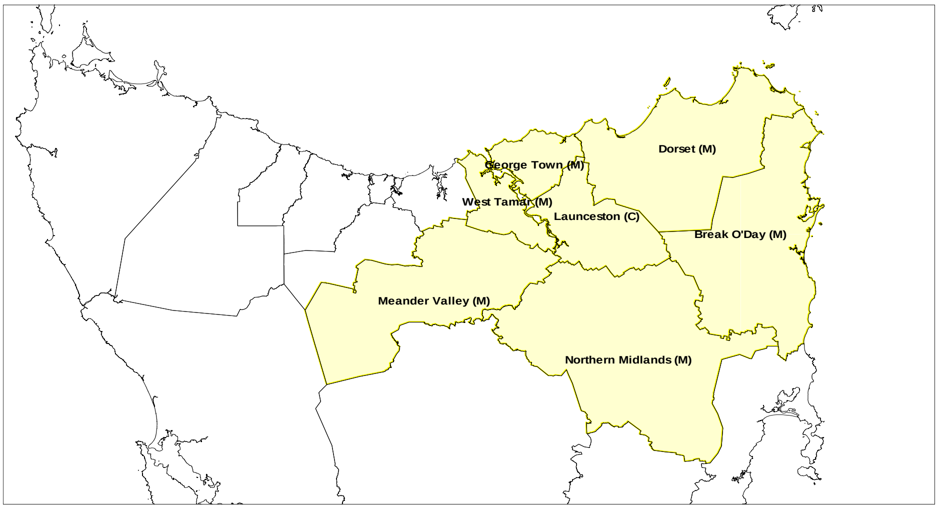
9 Potential for Growth of the Tasmanian Wine Sector - ....might it become the Pinot Isle?; Dr. Richard E Smart, Smart Viticulture and RuralSmart, Launceston 2010.
10 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65.

1. Introduction

This report provides an economic development strategy for Break O'Day LGA. It outlines major indicators and trends, and identifies key issues for the region and for future development. The content has been derived from a review of industry and regional reports; an analysis of ABS and other data; a review of recent community consultations; and consultations with businesses in the area.
The report has been prepared by MCa (Michael Connell & Assocs.). The views expressed in this report are those of the consultants and do not necessarily reflect the views of Break O'Day Council or government agencies supporting the study.

Study Area
The study are covers the entire Break O'Day local government area and its main towns and villages. Break O'Day LGA covers: coastal towns including St Helens, Scamander, Falmouth, Four Mile Creek, Beaumaris, Steiglitz, Seymour, Ansons Bay and Binalong Bay; and inland towns - St Marys, Fingal, Mathinna, Mangana, Cornwall, Pyengana, Goshen and Weldborough.

Break O'Day is part of the Northern Region of Tasmania and the strategy outlined in this report is consistent with strategies developed for this broader region.[11]



Northern Tasmania Region

11 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA)

2. The Region - Population

2.1 Overview

ABS Census 2011 data highlights a number of key features of the Break O'Day LGA:

- Size - the population is relatively small, at around 6000 persons in 2011.
- Growth - the period 2001-2006 was one of growth but the population was largely static between 2006 and 2011.
- Location - the population is focused in coastal locations (home to 65% of residents). St Helens/Stieglitz is the major regional centre (with 35% of the population) and the other main centres are St Marys (13%) and Scamander (12%).
- Holiday homes - represent around 38% of dwellings (1607). The downturn in the economy over the last 3 years has seen a number of holiday houses being put on the market. [12]
- The population is ageing, with an increase in persons aged 55 and over and some younger persons (aged 25-44 years and mainly family groups) leaving the area. This trend has accelerated in the 5 years to 2011. Departures are primarily related to education requirements and limited full time jobs in the region.
- In the last 10 years persons aged 55 and over increased from 31% of the population to 41% in 2011. Reflecting this ageing, the median age increased from 43 years in 2001 to 49 years in 2011. The average household size has declined from 2.3 persons to 2.1persons.
- Labour force participation rates are generally lower than in other areas, reflecting this older age structure of the population (including some early retirements).

These characteristics have been exacerbated by: a slow economy over the last 5 years; limited growth in full time jobs (and no overall growth in male full time jobs); and a loss of jobs in several of the key resource industries (that have historically been major parts of the local economy).

More recent trends over the last 2 years are linked to the impacts of a slow economy and weakening visitor market on businesses in the area. Longer term projections are for continued growth in Break O'Day's population as people are attracted to the coastal lifestyle. However given the static population numbers in the last 5 years, the long term targets are unlikely to be achieved and will need to be revised.[13]

2.2 Regional Population

Break O'Day has some key demographic characteristics that are driven by several factors: an ageing of the population as persons are attracted to the area and the existing population ages in place; and a loss of persons in the economically active age groups (eg. 25-44 years) through families with children and young people leaving the area for education and for employment reasons.

These factors have been exacerbated by a slow-down in the economy over the last 5 years: limited growth in full time jobs; no growth in the total number of male full time jobs (over a decade); and loss of jobs in several of the key resource-based industries.

12 Local discussions indicate that around 30% of the holiday housing stock is owned by persons from mainland Australia (ie. 450-500 houses) with the remaining owners mainly persons resident in Launceston, Hobart or some inland areas.

13 The Demographic Change Advisory Council has prepared projections for all Tasmanian LGAs for the period to 2031. Break O Day was projected to increase population by 20% between 2011 and 2031. These projections will not be realised with the recent slowdown in population growth. Based on the lower population figure of 6000 in 2011 and if the projected growth rate of 20% applied then the resident population would be 7200 in 2031 (compared with the projection of 7908).

2.2.1 Population Size

The population has grown since 2001, but the rate slowed in the 2006-2011 period.

Table 1. Population Break O'Day LGA 2001-2011

Break O'Day	Males	Females	Persons
Population			
2001	2841	2713	5554
2006	3062	2957	6019
2011	3062	2933	5995

Source: ABS Census 2011 Time Series Data

The last decade has been: a decline in the number of persons aged 25-44 years and children under 14 years (reflecting families with children leaving the area); and an increase in persons aged 55 years and over (reflecting the attractiveness as a retirement location). The departure of families is being driven by the regional job situation (ie. no growth in jobs held by males and a decline in jobs in the resources sectors). Over this same period persons aged 55 and over increased from 31% of the population to 41% in 2011. Reflecting this ageing pattern, the median age increased from 43 years in 2001 to 49 years in 2011.

Table 2. Population by Age Group - Break O'Day LGA 2001-2011

Population							2001-06 Change	2006-11 Change	2001-11 Change
	2001		2006		2011				
Break O'Day LGA	Persons	Share %	Persons	Share %	Persons	Share %	Persons	Persons	Persons
Age Group									
0-4 years	**364**	**6.6**	**303**	**5.0**	**316**	**5.3**	**-61**	**13**	**-48**
5-14 years	**753**	**13.6**	**844**	**14.0**	**703**	**11.7**	**91**	**-141**	**-50**
15-19 years	256	4.6	249	4.1	281	4.7	-7	32	25
20-24 years	164	3.0	183	3.0	176	2.9	19	-7	12
25-34 years	**543**	**9.8**	**509**	**8.5**	**435**	**7.3**	**-34**	**-74**	**-108**
35-44 years	**848**	**15.3**	**814**	**13.5**	**659**	**11.0**	**-34**	**-155**	**-189**
45-54 years	896	16.1	981	16.3	980	16.3	85	-1	84
55-64 years	**799**	**14.4**	**1063**	**17.7**	**1167**	**19.5**	**264**	**104**	**368**
65-74 years	**531**	**9.6**	**648**	**10.8**	**792**	**13.2**	**117**	**144**	**261**
75-84 years	319	5.7	331	5.5	349	5.8	12	18	30
85 years and over	81	1.5	94	1.6	136	2.3	13	42	55
Total	**5554**	**100.0**	**6019**	**100.0**	**5994**	**100.0**	**465**	**-25**	**440**

Source: ABS Census 2011 Time Series Data

Table 3. Median Age of Residents - Break O'Day 2001-2006

Break O'Day LGA	2001	2006	2011
Median age (persons) years	43	46	49
Average household size	2.3	2.2	2.1

Source: ABS Census 2011 Time Series Data

2.2.2 Locations - Town Populations

The population is concentrated in the coastal areas of the LGA. Coastal populations have been growing, while some inland areas have been losing population. In 2011 over three quarters of the population was located in coastal towns, with St Helens being the major centre with 25% of the LGA's population. In addition holiday houses make up almost 40% of the total housing stock in the region.

Table 4. Resident Population by Town - Break O'Day LGA 2011

Town				Share %
Population 2011	**Males**	**Females**	**Persons**	**Persons**
Coastal Locations				
St Helens (Urban Area)	712	786	1498	24.2
Stieglitz (includes Akaroa)	326	317	643	10.4
Binalong Bay	108	102	210	3.4
Ansons Bay/Pyengana	203	168	371	6.0
Beaumaris	144	138	282	4.6
Scamander	371	348	719	11.6
Falmouth/Four Mile Creek	108	87	195	3.1
Seymour (includes Gray)	72	69	141	2.3
Total Coastal	**2044**	**2015**	**4059**	**65.5**
Inland Locations				
St Marys	407	393	800	12.9
Fingal	191	175	366	5.9
Mathinna	157	130	287	4.6
Balance (Other Inland)	358	325	683	11.0
Total Inland	**1113**	**1023**	**2136**	**34.5**
Total Coast & Inland	**3157**	**3038**	**6195**	**100.0**

Source: ABS Census 2011, Basic Community Profile. (Resident Population Data)

Note: locations are all SSC (State Suburb Classification), except St Helens (Urban Area)

Table 5. Dwellings in Break O'Day LGA 2011

Table 6. Location	Occupied Dwellings	Unoccupied Dwellings	Total Dwellings
Break O'Day LGA	2586	1607	4193
Share (%)	61.7	38.3	100
Coastal Locations			
St Helens (Urban Area)	661	222	883
Stieglitz (includes Akaroa)	265	296	561
Binalong Bay	77	185	262
Ansons Bay/Pyengana	146	222	368
Beaumaris	115	74	189
Scamander	297	155	452
Falmouth/Four Mile Creek	80	101	181
Seymour (includes Gray)	58	27	85
Total Coastal	**1699**	**1282**	**2981**
Share (%)	**57.0**	**43.0**	**100.0**
Inland Locations			
St Marys	346	88	434
Fingal	162	23	185
Mathinna	111	64	175
Balance (Other Inland)	268	150	418
Total Inland	**887**	**325**	**1212**
Share	**73.2**	**26.8**	**100.0**
Total Coastal & Inland			
Total Coast & Inland	2586	1607	4193
Share (%)	61.7	38.3	100.0

Source: ABS Census 2011, Basic Community Profile. (Resident Population Data)

Note: locations are all SSC (State Suburb Classification), except St Helens (Urban Area)

Based on the population (6195) resident in the occupied dwellings (2586), there is an average of 2.4 persons per dwelling. If all dwellings were occupied by residents, this implies a notional population capacity of 10,063 persons in the LGA.[14] In other words, the area could house an additional 3868 persons in the existing housing stock, if all holiday houses were fully occupied.

Local discussions indicate that around 30% of the holiday housing stock is owned by persons from mainland Australia (ie. around 450-500 houses) with the remaining owners mainly persons resident in Launceston, Hobart or in some inland areas. The downturn in the national/state economy over the last 3 years has seen an increased number of holiday houses being placed on the market.

14 It is recognised that some of this housing stock comprises shacks and other holiday houses that may not be suitable for permanent occupancy.

2.2.3 Future Population

The Demographic Change Advisory Council has prepared projections for all Tasmanian LGAs for the period to 2031. Break O'Day was projected to increase its population by 20% between 2011 and 2031. These projections will not be realised with the recent slowdown in population growth (particularly the medium term numbers).

Table 7. Population Projections - Selected LGAs 2016-2031

LGA	2016	2021	2026	2031	Change 2016-2031	% Change 2016-2031
Break O'Day	6909	7262	7601	7908	999	14.5
Dorset	7174	7139	7082	7001	-173	-2.4
Launceston	68,745	70,918	73,044	75,009	6264	9.1
Glamorgan Spring Bay	4946	5165	5332	5428	482	9.7

Source: Demographic Change Advisory Council Projections 2010

The following are long term population projections prepared by Urbis in the draft Structure Plan. The projections for Break O'Day for 2030 align with our analysis of the population outlook and take account of recent slow-downs in population growth.

Table 8. Population Projections - Break O Day Selected Years to 2030

Population Projections	Break O Day	St Helens	St Marys
2011 Census	**6194**	**2816**	800
Projections (Urbis)			
2021	**6822**	**3102**	881
2030	**7309**	**3323**	944
Change 2011-2030			
No.	1115	507	144
% change	**18.0**	**18.0**	**18.0**

Source: St Helens Structure Plan – Background Report (Draft), Urbis 2012 P17

The East Coast Region is projected to continue to grow based on retirement aged persons seeking a sea change. This has implications for the housing demand and for the pattern of service demand (including access to health services). This pattern is likely to strengthen St Helens' role as a regional service centre. There is also likely to be a continued long term demand for coastal holiday homes.[15] Population size and growth also has implications for future floor space needs for retail, commercial and light industrial space.

2.3 Labour Force

Labour force characteristics are important to an understanding the nature of the regional economy (in terms of an available workforce and participation). An analysis of the labour force data shows: lower labour force participation rates (reflecting the age structure and the retirement patterns) in the region; and a slow-down in jobs growth (and contraction in jobs some sectors).

2.3.1 Labour Force Participation

Labour force data for residents for the period to 2011 shows several trends:

- A decline in full time employment of males between 2006 and 2011 (from 726 to 662).
- An increase in female employment (in both full time and part time jobs).
- A major decline in unemployment rates between 2001 and 2006 and an increase between 2006 and 2011. Males have much higher rates of unemployment compared with females (reflecting the differences in jobs growth).
- An increase in labour force participation rates for females (from 39% in 2001 to 42% in 2011); and a decline for males (from 52% in 2001 to 48% in 2011). This period saw an increase in males not in the labour force (from 996 in 2001 to 1189 in 2011).

15 Vision East 2030 - The East Coast Land Use Framework, December 2009, East Coast Councils P30

Table 9. Labour Force - Break O'Day LGA 2001-2011

Labour Force		2001 Census			2006 Census			2011 Census	
Break O'Day LGA	Males	Females	Persons	Males	Females	Persons	Males	Females	Persons
Persons aged 15 years and over	2255	2179	4434	2472	2389	4861	2524	2431	4955
Labour force status:									
Employed, worked full-time	642	255	897	726	320	1,046	662	328	990
Employed, worked part-time	251	419	670	276	511	787	306	538	844
Employed, away from work	72	60	132	79	76	155	89	81	170
Unemployed, looking for work	216	113	329	115	82	197	151	80	231
Total labour force	1181	847	2028	1196	989	2185	1208	1027	2235
Not in the labour force	996	1214	2210	1105	1261	2366	1189	1289	2478
% Unemployment	18.3	13.3	16.2	9.6	8.3	9.0	12.5	7.8	10.3
% Labour force participation	52.4	38.9	45.7	48.4	41.4	44.9	47.9	42.2	45.1
% Employment to population	42.8	33.7	38.3	43.7	38.0	40.9	41.9	38.9	40.4

Source: ABS Census 2011 Resident Population Time Series Data

Data for employed persons by age shows that the period 2001-2006 was one of jobs growth (in both full time and part time jobs), with the number of residents in employment increasing across all age categories. The 2006-2011 period saw a major slow-down, with residents in full time employment declining (particularly persons aged 25-39 years).

For residents (persons) aged 55 years and over, the numbers not in the workforce increased in both periods, with this representing people in retirement or who are transitioning to retirement.

Table 10. Employed Persons by Age - Break O'Day LGA 2001-2011

Employed Persons										Change			Change			Change		
Break O'Day LGA	2001			2006			2011			2001-06			2006-11			2001-11		
Age Groups	Emp F/T	Emp P/T	Not in LF	Emp F/T	Emp P/T	Not in LF	Emp F/T	Emp P/T	Not in LF	Emp F/T	Emp P/T	Not in LF	Emp F/T	Emp P/T	Not in LF	Emp F/T	Emp P/T	Not in LF
15-19 years	30	39	151	30	44	95	27	58	151	0	5	-56	-3	14	56	-3	19	0
20-24 years	54	28	41	69	35	127	68	32	41	15	7	86	-1	-3	-86	14	4	0
25-39 years	285	182	300	314	184	226	229	173	193	29	2	-74	-85	-11	-33	-56	-9	-107
40-54 years	410	294	462	464	361	385	473	332	339	54	67	-77	9	-29	-46	63	38	-123
55-64	105	94	507	148	137	646	161	186	680	43	43	139	13	49	34	56	92	173
65+	15	33	753	20	27	930	30	64	1074	5	-6	177	10	37	144	15	31	321
Total	**899**	**670**	**2214**	**1045**	**788**	**2409**	**988**	**845**	**2478**	**146**	**118**	**195**	**-57**	**57**	**69**	**89**	**175**	**264**

Source: ABS Census 2011 Resident Population Time Series Data

For persons in employment - 61% of persons aged 15-19 years worked part-time (with many of these being students with part-time jobs). The increase in the share of persons working part-time from age 55 and over represents a combination of transition to retirement and the decline in full time jobs in the region.

Table 11. Employed Persons - Full Time and Part Time Break O'Day 2011 (Persons)

Break O'Day LGA	Share		Persons
Persons Working	Worked full-time %	Worked part-time %	Total Working No
15-19 years	28.4	61.1	95
20-24 years	64.2	30.2	106
25-39 years	51.6	39.0	444
40-54 years	54.0	37.9	876
55-64	42.4	48.9	380
65+	28.6	61.0	105
Total	**49.3**	**42.1**	**2006**

Source: ABS Census 2011 Resident Population Data

Table 12. Labour Force Participation by Age - Break O'Day LGA 2011 (Persons)

	Employ FT	Employ PT	Hours not stated	Employ	Share in Employ	Not in work/fce.	Share Not in work fce...	Unemp.	Total Persons Aged 15 +
Age Groups				No	%	No	%	No	No
15-19 years	27	58	10	95	30.9	151	54.9	15	275
20-24 years	68	32	6	106	57.1	41	23.4	20	175
25-39 years	229	173	42	444	56.5	193	27.1	48	711
40-54 years	473	332	71	876	59.4	339	25.0	93	1356
55-64	161	186	33	380	29.8	680	58.4	50	1165
65+	30	64	11	105	7.4	1074	84.2	4	1275
Total Aged 15 years and over	**988**	**845**	**173**	**2006**	**37.0**	**2478**	**50.0**	**230**	**4957**

Source: ABS Census 2011 Resident Population Data

Table 13. Employed Persons by Age - Break O'Day LGA 2011 (Persons)

Break O'Day	Employed					
Employed Persons	Worked full-time	Worked part-time	Away from Work	Hours Worked Not Stated	Total	Shares %
15-19 years	27	58	10	0	95	4.7
20-24 years	68	32	3	3	106	5.3
25-39 years	229	173	35	7	444	22.1
40-54 years	473	332	53	18	876	43.7
55-64	161	186	20	13	380	18.9
65+	30	64	4	7	105	5.2
Total	**988**	**845**	**125**	**48**	**2006**	**100.0**
Shares	**49.3**	**42.1**	**6.2**	**2.4**	**100.0**	

Source: ABS Census 2011 – Working Population Data

2.3.2 Area Data

Resident data were available for each of the local areas. It shows that the overall labour force participation rate was 43.8%. Labour Force participation rates were higher in some of the smaller coastal locations (with many of these residents travelling to jobs in St Helens).

Table 14. Labour Force Participation by Area - Break O'Day LGA 2011

Break O'Day 2011	Labour Force Participation Rate			Employed				
Location	Males %	Females %	Persons %	Employed FT	Employed PT	Total Labour Force	Not in Labour Force	Total Persons Aged 15 and over
Break O'Day LGA	46.1	41.4	43.8	**979**	**848**	2260	2636	5164
Coastal								
St Helens	45.7	41.2	43.4	345	304	792	945	1824
Stieglitz	36.2	35.4	35.8	81	90	201	316	563
Binalong Bay	51.1	38.9	44.9	27	36	84	77	186
Ansons Bay	50.6	43.3	47.2	66	47	145	148	306
Beaumaris	47.1	45.7	46.4	43	46	109	114	236
Scamander	54.8	49.0	52.0	136	113	305	259	586
Falmouth/Four Mile Creek	60.0	56.4	58.3	42	45	98	63	167
Seymour	54.1	46.7	50.4	28	19	61	52	121
Total				**768**	**700**	**1795**	**1974**	**3989**
Inland								
St Marys	40.4	42.9	41.7	116	91	267	351	642
Fingal	46.1	34.0	40.3	61	40	120	168	297
Mathinna	41.1	27.2	34.8	39	16	79	134	227
Total				**216**	**147**	**466**	**653**	**1166**
Total Coast and Inland								**5155**

Source: ABS Census 2011 – Resident Population Data

2.4 Income - Break O'Day Region

Data is available from the ABS Census and from ABS Regional Profiles on income and income sources by local government area. The table below shows that in 2010, 43% of the population aged over 15 years (2322) was in receipt of government payments (including Age Pension -19%, Disability Support Pension - 9% and Newstart Allowance -7%). This pattern reflects a combination of retirement living and unemployment.

Wage and salary earners (2138) accounted for 39% of residents and business owners for 14%. In 2009 earnings accounted for almost $95 million in regional income (wages and salaries payments - $68 million, business income $10 million, investment income $13 million, superannuation $3 million).

Table 15. Income Sources - Residents Break O Day LGA 2006-2010

Income Sources	2006	Share %	2007	Share %	2008	Share %	2009	Share %	2010	Share %	Change 2006-2010
Wages and Other Income											
Wage and salary earners	2080	40.3	2124	40.7	2183	40.6	2138	40.8	2138	39.4	58
Own unincorporated business earners	761	14.7	788	15.1	811	15.1	789	15.1	789	14.6	28
Superannuation and annuity earners	226	4.4	224	4.3	213	4.0	171	3.3	171	3.2	-55
Total Wages /Business Income/Super	**3067**	**59.4**	**3136**	**60.1**	**3207**	**59.6**	**3098**	**59.2**	**3098**	**57.2**	**31**
Government Payments											
Age Pension	909	17.6	919	17.6	985	18.3	1037	19.8	1040	19.2	131
Carers Payment	97	1.9	103	2.0	121	2.2	138	2.6	156	2.9	59
Disability Support Pension	457	8.8	456	8.7	487	9.1	501	9.6	509	9.4	52
Newstart Allowance	362	7.0	360	6.9	340	6.3	348	6.6	397	7.3	35
Parenting Payment - Single	161	3.1	137	2.6	123	2.3	114	2.2	105	1.9	-56
Youth Allowances	111	2.1	111	2.1	116	2.2	116	116.0	115	2.1	4
Total Pensions and Support	**2097**	**40.6**	**2086**	**39.9**	**2172**	**40.4**	**2138**	**40.8**	**2322**	**42.8**	**225**
Total All Income Sources	**5164**	**100.0**	**5222**	**100.0**	**5379**	**100.0**	**5236**	**100.0**	**5420**	**100.0**	**256**
Population Estimates											
Total Persons	**6248**		**6262**		**6316**		**6410**		**6514**		
Total Persons Under 15	1172		1170		1175		1155		1142		
Persons Over 15	5076		5092		5141		5255		5372		

Source: ABS National Regional Profile, Break O'Day (M), 2006-2010; November 2011 (wages and salaries, business income, superannuation estimated for 2010).

Table 16. Wage and Other Income Sources - Residents Break O Day LGA 2006-2010

Income		2006	2007	2008	2009
Wage and salary income	$m	55.6	59.5	64.8	67.8
Own unincorporated business income	$m	8.7	10.1	10.5	10.5
Investment income	$m	8.2	9.8	12.3	13.2
Superannuation and annuity income	$m	4.8	5.0	4.2	3.3
Total		**77.3**	**84.4**	**91.8**	**94.8**

Source: ABS National Regional Profile, Break O'Day (M), 2006-2010; November 2011 (wages and salaries, business income, superannuation estimated for 2010).

ABS Census 2011 data show that weekly income (for individuals and households) was higher in St. Helens than St. Marys. This together with the higher median age (50 years in St. Helens and 46 years in St. Marys) reflects retirement patterns and the generally higher prices of coastal properties (owned by persons with higher incomes).

Table 17. Selected Medians – Break O Day LGA and Major Town Residents 2011

Medians	Break O' Day LGA	St Helens	St Marys
Median age of persons	50	51	46
Median total personal income ($/weekly)	366	375	346
Median total family income ($/weekly)	831	857	706
Median total household income ($/weekly)	654	662	572
Median mortgage repayment ($/monthly)	953	1000	693
Median rent ($/weekly)	167	175	140
Average household size	2.1	2.1	2.2

Source: ABS Census 2011, Resident Population Data

Overall Break O'Day is not a high income area and this is indicated by data on household income levels and individual income levels.

- Data for 2011 shows that 41% of households had weekly household incomes of less than $600 (11% were less than $300 per week) and only 24% had incomes above $1000 per week.
- In all 64% of individuals had personal incomes below $600 per week, with 35% having incomes of less than $300 per week. The latter largely reflects the numbers receiving government payments, including pensions and other benefits.

Table 18. Weekly Household Income - Break O Day LGA and Major Town Residents 2011 (No of Households)

No Households	Break O Day LGA				St Helens				St Marys				Other Areas in LGA			
Weekly Household Income ($) 2011	Family	Non-family	Total	%	Family	Non-family	Total	%	Family	Non-family	Total	%	Family	Non-family	Total	%
<$300	71	214	285	11.0	21	80	101	11.0	6	31	37	10.7	44	103	147	11.1
$300-$599	368	402	770	29.8	108	167	275	30.0	70	56	126	36.3	190	179	369	28.0
<$600	**439**	**616**	**1055**	**40.8**	**129**	**247**	**376**	**41.0**	**76**	**87**	**163**	**47.0**	**234**	**282**	**516**	**39.1**
$600-$ 999	464	147	611	23.6	176	54	230	25.1	51	21	72	20.7	237	72	309	23.4
$1000-$1999	401	66	467	18.1	133	30	163	17.8	40	15	55	15.9	228	21	249	18.9
$2000-$2999	106	16	122	4.7	27	0	27	2.9	16	0	16	4.6	63	16	79	6.0
$3000-$4000+	40	0	40	1.5	14	0	14	1.5	4	0	4	1.2	22	0	22	1.7
Income not stated	232	57	289	11.2	89	19	108	11.8	34	3	37	10.7	109	35	144	10.9
Total	**1682**	**902**	**2584**	**100.0**	**568**	**350**	**918**	**100.0**	**221**	**126**	**347**	**100.0**	**893**	**426**	**1319**	**100.0**

Source: ABS Census 2011. Resident Population Data

Table 19. Weekly Personal Income -Break O' Day LGA and Major Town Residents 2011 (Persons)

Total Personal Income (Weekly)	Break O' Day LGA	Share	St Helens	Share	St Marys	Share	Other Areas in LGA	Share
	No	%	No	%	No	%	No	%
<$300	1801	34.9	556	30.5	245	38.2	1000	37.1
$300-$599	1682	32.6	682	37.4	217	33.8	783	29.0
<$600	**3483**	**67.4**	**1238**	**67.9**	**462**	**72.0**	**1783**	**66.1**
$600-$999	774	15.0	301	16.5	81	12.6	392	14.5
$1000-2000+	536	10.4	161	8.8	62	9.7	313	11.6
Personal income not stated	371	7.2	124	6.8	37	5.8	210	7.8
Total	**5164**	**100**	**1824**	**100**	**642**	**100**	**2698**	**100.0**

Source: ABS Census 2011. Resident Population Data

Overall the region has a significant number of residents on relatively low incomes and this impacts on the pattern of demand for goods and services.

2.5 Measuring Disadvantage (SEIFA)

The ABS has developed a series of social and economic indices that measure relative advantage and disadvantage, and these are available at an LGA level. The indices cover: relative socio-economic advantage and disadvantage; economic resources; and education and occupation. They provide a relative measure of the socioeconomic conditions of a community or neighborhood as a whole.

For the indices, the lower the score the more disadvantaged a region is (and a high score means an area is more advantaged). The deciles indicate where an area is positioned in terms of disadvantage.[16]

The lower income levels for Break O' Day are also reflected in the SEIFA indicators. Break O'Day is in the second decile for the Index of Relative Socio-economic Disadvantage (for Tasmania) and is ranked as the third most disadvantaged LGA in Tasmania (and the 48th most disadvantaged in Australia). The following table shows the SEIFA index for Break O'Day and the neighbouring LGAs in the Northern Region. This ranking reflects a number of factors including income levels, education levels and occupational mix.

16 The indices use a number of measures including income, employment, occupation , housing and other indicators.

Table 20. Index of Relative Socio-economic Advantage and Disadvantage-2011 Northern Tasmania

Local Government Area	Usual Resident Population	Score	Ranking within Australia			Ranking within State or Territory				Minimum score for SA1s in area	Maximum score for SA1s in area
			Rank	Decile	Percentile	State	Rank	Decile	Percentile		
Northern Region											
Break O'Day (M)	6202	882	48	1	9	TAS	3	2	NA	769	976
Dorset (M)	6805	910	84	2	15	TAS	11	4	NA	807	988
Flinders (M)	770	953	240	5	43	TAS	23	8	NA	677	983
George Town (M)	6638	862	41	1	8	TAS	2	1	NA	693	1037
Launceston (C)	64161	930	137	3	25	TAS	17	6	NA	561	1106
Meander Valley (M)	18867	964	273	5	49	TAS	25	9	NA	839	1101
Northern Midlands (M)	12248	944	203	4	36	TAS	21	8	NA	739	1087
West Tamar (M)	21836	993	391	7	70	TAS	27	10	NA	750	1115
Total Population	**137526**										

Source: ABS SEIFA Index of Relative Socio-economic Advantage and Disadvantage, 2011- March 2013

While Break O'Day is ranked as the third most disadvantaged LGA in Tasmania, it ranks higher on several of the other indices - Index of Economic Resources; and Index of Education and Occupation.

Table 21. SEIFA Indices 2011 - Break O'Day LGA

Break O'Day SEIFA	2011	Ranking within Australia			Ranking within State or Territory				Min score for SA1s in area	Max score for SA1s in area
	Score	Rank	Decile	Percentile	State	Rank	Decile	Percentile		
Index of Relative Socio-economic Advantage and Disadvantage (Table 2)	882	48	1	9	TAS	3	2	NA	769	976
Index of Relative Socio-economic Disadvantage (Table 3)	891	54	1	10	TAS	3	2	11	760	999
Index of Economic Resources (Table 4)	925	75	2	14	TAS	6	3	21	783	1027
Index of Education & Occupation (Table 5)	899	51	1	10	TAS	9	4	31	799	1013

Source: ABS SEIFA Indices 2011- March 2013

In summary, Break O'Day ranks as disadvantaged overall in terms of the SEIFA Indices. However there is also a significant dispersion between areas with the LGA, will some areas having low scores and others having much higher scores.

3. Regional Economy

3.1 Overview

There are several key features of the regional economy:

- The industry base of the area has narrowed and it has become a service economy, servicing the local/regional population (East Coast/North East) and the visitor market.
- There are limited regional export industries, as there have been major declines in the traditional resource sectors of seafood, forest products and agriculture.
- Much of industry located in the industrial areas is light industry servicing local and regional industries (eg. servicing agriculture, mining, boats, building and construction).
- Most businesses are small businesses and many are owner operated - with no employees (or employing family members only).
- Tourism is important for St Helens and the other coastal locations - but the sector has been under pressure in recent years with declining visitor numbers. The sector is highly dependent on the summer season and Easter and holiday peaks.
- Services - major areas of employment in the LGA are in-person services that are servicing a local/regional population (eg. retail, education, health services).
- The recession has impacted on the region: Break O'Day went from strong growth in jobs in the period 2001-2006 to experiencing almost no growth in jobs between 2006-2011.
- Job impacts have several dimensions: no increase in jobs that traditionally employ males (except for construction and some manufacturing jobs); and an increase in service jobs that mainly employ females (eg. in health, aged care, retail, education). Much of this jobs growth over the last decade has been part-time jobs.
- The only current major industry development in the region is Hard Rock Coal's mine project, which will generate around 60-70 direct jobs in the construction phase and up to 200 direct jobs when the mine is fully operational.

The following table shows the population size and major activities of each of the towns and villages in the LGA.

Table 22. Locations and Activities - Break O'Day LGA

Locations	Population 2011	Share	Major Activities
	Persons	%	
Coastal			
St Helens	2173	35.1	Major centre for the area and location for jobs in retail services, health, business services, seafood, manufacturing and tourism.
Stieglitz	643	10.4	Residential some accommodation, aerodrome, aquaculture.
Binalong Bay	210	3.4	Major tourist destination and access point to Bay of Fires Conservation Area. Residential and tourist location – café, accommodation.
Ansons Bay/Pyengana	371	6.0	Residential and national park areas. Dairy and beef farming, Pyengana Dairy Co, Pub in the Paddock.
Beaumaris	282	4.6	Residential and some tourist accommodation.
Scamander	719	11.6	Residential and tourist area – small commercial node providing accommodation, local retail and cafes/fast food.
Falmouth/Four Mile Creek	195	3.2	Residential and agribusiness, White Sands Resort, Brewery, Winery.
Seymour	141	2.3	Coastal farming area.
Total	**4734**	**76.5**	
Inland			
St Marys	800	12.9	Main inland centre – local retail, health services, library and schools. Service centre for the Fingal Valley. Forestry and mining in the adjacent areas. Gateway to East Coast. Future depends on retaining and growing the population, developing retail services and the visitor market.
Fingal	366	5.9	Historic inland town, local retail and services, café, accommodation and farming areas. Future depends on population growth and tourism potential. Mining in proximity to the town. Small population (town and hinterland) places pressure on viability of service businesses. Future depends on rural living and tourism.
Mathinna	287	4.6	Inland town, forest and agribusiness activity.
Total	**1453**	**23.5**	
Total Coast & Inland	**6187**	**100.0**	

Source: ABS Census 2011 and MCa Analysis

Appendices B and C provide more information on the key centres of St Marys and St Helens.

3.2 Industry Structure

Jobs in the region are primarily driven by servicing of the local population and the tourism market. In 2011 there were a total of 1682 jobs located in the Break O'Day, and most of these were in services.

- Almost 60% were in-person service jobs, which are servicing the local regional population: retail (225 or 13%); health (202 or 12%); education and training (173 or 10%).
- Accommodation and food services (cafes etc.) accounted for 198 jobs or 12% of jobs in the area.
- There were a total of 100 jobs (6%) in business services covering: real estate services, professional services (legal, accounting, technical services) and financial services (banking finance etc.). This sector is servicing both regional businesses and the regional population.

Goods producing businesses tend to be servicing broader markets and are exporting products out of the region. These businesses accounted for 460 jobs (27% of regional jobs). The major sectors were agriculture, forestry and fishing (177 or 10%); manufacturing (100 or 6%); and construction (94 or 6%).
While total jobs have increased over the period 2001-2006, most of this growth occurred between 2001 and 2006, with jobs largely flat in the 2006 -2011 period.

- The jobs situation is based on several trends: a major reduction in traditional resource sectors (seafood, forest products and agriculture); and an increase in manufacturing and construction activity.
- Overall jobs growth was strongest in several areas of services (health, education, public administration and safety) and in tourist related activities (accommodation and food service).

Table 23. Jobs in the Region - Break O'Day LGA 2001-2011

Working Population Data - Jobs	2011		2006		2001	
Break O'Day LGA	**Person**	**Share %**	**Person**	**Share %**	**Person**	**Share %**
Goods Producing						
Agriculture, forestry and fishing	177	10.5	234	14.3	277	18.6
Mining	66	3.9	60	3.7	70	4.7
Manufacturing	100	5.9	95	5.8	70	4.7
Electricity, gas, water and waste services	23	1.4	12	0.7	13	0.9
Construction	94	5.6	90	5.5	60	4.0
Total	**460**	**27.3**	**491**	**30.0**	**490**	**32.9**
Goods Related Services						
Wholesale trade	37	2.2	26	1.6	48	3.2
Transport, postal and warehousing	85	5.1	61	3.7	37	2.5
Total	**122**	**7.3**	**87**	**5.3**	**85**	**5.7**
In Person Services						
Retail trade	225	13.4	212	13.0	227	15.2
Accommodation and food services	198	11.8	214	13.1	150	10.1
Education and training	173	10.3	159	9.7	129	8.7
Health care and social assistance	202	12.0	184	11.3	139	9.3
Administrative and support services	22	1.3	24	1.5	0	0.0
Public administration and safety	118	7.0	94	5.7	65	4.4
Arts and recreation services	18	1.1	12	0.7	26	1.7
Other services	36	2.1	42	2.6	53	3.6
Total	**992**	**59.0**	**941**	**57.6**	**789**	**53.0**
Business Services						
Financial and insurance services	22	1.3	21	1.3	8	0.5
Rental, hiring and real estate services	32	1.9	30	1.8	18	1.2
Professional, scientific and technical services	37	2.2	33	2.0	38	2.6
Information media and telecommunications	9	0.5	16	1.0	22	1.5
Total	**100**	**5.9**	**100**	**6.1**	**86**	**5.8**
Inadequately described/Not stated	8	0.5	16	1.0	0	0.0
Total All	**1682**	**100.0**	**1635**	**100.0**	**1490**	**100.0**

Source: ABS Census 2011, Working Population Data Time Series

3.3 Businesses in the Region

Most businesses in the region are small businesses: only 9 businesses employed 20 or more persons (the 3 largest businesses employed over 100 persons and were in agriculture, forestry and in fishing and 3 retailers employed over 50 persons); 66 employed 5-19 persons and these were in agriculture, retail and accommodation and in food service. Almost 90% of local businesses did not have employees or employed between 1-4 persons.

On a turnover basis, only 21 businesses (of a total of 555) had annual turnovers of $1 million or more, with these businesses being in retail, agriculture forestry and fishing, and in transport.

Table 24. Business by Employment Size - Break O'Day LGA 2009

	Employment Range								
Number of Businesses 2009 Industry	Non employing	1-4	5-19	20-49	50-99	100-199	200+	Total	Share %
Goods Producing									
Agriculture, Forestry and Fishing	72	42	15	0	0	3	0	132	23.8
Mining	0	0	0	0	0	0	0	0	0.0
Manufacturing	18	3	3	0	0	0	0	24	4.3
Electricity, Gas, Water and Waste Services	3	0	0	0	0	0	0	3	0.5
Construction	78	39	3	0	0	0	0	120	21.6
Total Goods Producing	**171**	**84**	**21**	**0**	**0**	**3**	**0**	**279**	**50.3**
Goods Related Services									
Wholesale Trade	12	3	0	0	0	0	0	15	2.7
Transport, Postal and Warehousing	12	15	6	0	0	0	0	33	5.9
Total	**24**	**18**	**6**	**0**	**0**	**0**	**0**	**48**	**8.6**
In Person Services									
Retail Trade	36	12	12	0	3	0	0	63	11.4
Accommodation and Food Services	6	18	15	0	0	0	0	39	7.0
Education and Training	6	3	0	0	0	0	0	9	1.6
Health Care and Social Assistance	3	0	0	3	0	0	0	6	1.1
Administrative and Support Services	6	0	3	0	0	0	0	9	1.6
Public Administration and Safety	0	0	0	0	0	0	0	0	0.0
Arts and Recreation Services	6	0	0	0	0	0	0	6	1.1
Other Services	12	6	6	0	0	0	0	24	4.3
Total	**75**	**39**	**36**	**3**	**3**	**0**	**0**	**156**	**28.1**
Business Services									
Financial and Insurance Services	6	3	0	0	0	0	0	9	1.6
Rental, Hiring and Real Estate Services	39	0	3	0	0	0	0	42	7.6
Professional, Scientific and Technical Services	12	6	0	0	0	0	0	18	3.2
Information Media and Telecommunications	3	0	0	0	0	0	0	3	0.5
Total	**60**	**9**	**3**	**0**	**0**	**0**	**0**	**72**	**13.0**
Inadequately described/Not stated									
Total All	**330**	**150**	**66**	**3**	**3**	**3**	**0**	**555**	**100**
Share %	**59.5**	**27.0**	**11.9**	**0.5**	**0.5**	**0.5**	**0.0**	**100.0**	

Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2007 to Jun 2009, February 2011

A significant issue for the region is that viable and sustainable businesses are needed to provide employment for the local population.[17] These jobs are dependent on regional market size and growth, resource based industries and growth in the visitor market.

17 Vision East 2030- The East Coast Land Use Framework, December 2009, East Coast Councils P15

Table 25. Business by Turnover Size - Break O'Day LGA 2009

Number of Businesses 2009	Turnover Range													
Industry	Zero to less than $25k	$25k to less than $50k	$50k to less than $75K	$75k to less than $100k	$100k to less than $150k	$150k to less than $200k	$200k to less than $500k	$500k to less than $1m	$1m to less than $2m	$2m to less than $5m	$5m to less than $10m	$10m to less than $20m	Total	Share %
Goods Producing														
Agriculture, Forestry and Fishing	18	24	12	9	15	3	27	18	6	0	0	0	132	23.8
Mining	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0
Manufacturing	6	0	6	0	3	0	6	3	0	0	0	0	24	4.3
Electricity, Gas, Water and Waste Services	0	0	0	0	3	0	0	0	0	0	0	0	3	0.5
Construction	6	12	18	12	9	24	27	12	0	0	0	0	120	21.6
Total Goods Producing	**30**	**36**	**36**	**21**	**30**	**27**	**60**	**33**	**6**	**0**	**0**	**0**	**279**	**50.3**
Goods Related Services														
Wholesale Trade	0	3	0	3	0	3	6	0	0	0	0	0	15	2.7
Transport, Postal and Warehousing	3	6	3	3	6	0	6	3	3	0	0	0	33	5.9
Total	**3**	**9**	**3**	**6**	**6**	**3**	**12**	**3**	**3**	**0**	**0**	**0**	**48**	**8.6**
In Person Services														
Retail Trade	12	9	3	0	3	6	15	3	3	6	0	3	63	11.4
Accommodation and Food Services	3	0	3	0	3	3	18	9	0	0	0	0	39	7.0
Education and Training	3	6	0	0	0	0	0	0	0	0	0	0	9	1.6
Health Care and Social Assistance	0	0	0	0	0	0	6	0	0	0	0	0	6	1.1
Administrative and Support Services	3	3	3	0	0	0	0	0	0	0	0	0	9	1.6
Public Administration and Safety	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0
Arts and Recreation Services	0	3	0	0	0	0	3	0	0	0	0	0	6	1.1
Other Services	6	6	0	0	0	3	9	0	0	0	0	0	24	4.3
Total	27	**27**	**9**	**0**	**6**	**12**	**51**	**12**	**3**	**6**	**0**	**3**	**156**	**28.1**
Business Services														
Financial and Insurance Services	3	0	0	0	6	0	0	0	0	0	0	0	9	1.6
Rental, Hiring and Real Estate Services	6	9	9	6	3	6	0	3	0	0	0	0	42	7.6
Professional, Scientific and Technical Services	6	6	3	0	0	0	3	0	0	0	0	0	18	3.2
Information Media and Telecommunications	3	0	0	0	0	0	0	0	0	0	0	0	3	0.5
Total	**18**	**15**	**12**	**6**	**9**	**6**	**3**	**3**	**0**	**0**	**0**	**0**	**72**	**13.0**
Inadequately described/Not stated														
Total All	**78**	**87**	**60**	**33**	**51**	**48**	**126**	**51**	**12**	**6**	**0**	**3**	**555**	**100**
Share %	**14.1**	**15.7**	**10.8**	**5.9**	**9.2**	**8.6**	**22.7**	**9.2**	**2.2**	**1.1**	**0.0**	**0.5**	**100.0**	

Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2007 to Jun 2009, February 2011

3.3 Trends 2001-2011

3.3.1 Jobs Trends

There have been two distinct periods for the region over the past decade:

- Growth period 2001-2006: with jobs increasing in most areas. This period was characterised by population growth, a strengthening economy, major growth in tourism activity and high levels of construction activity.
- Slowdown 2006-2011: with limited jobs growth. This period was characterised by: a slowdown in population growth; limited growth in jobs in most sectors; a decline in jobs in regional export industries (forestry, fishing and agriculture); a slowdown in construction; and a weakening in the tourism market (with declining visitor numbers-overnight interstate visitors and day visitors).

A unique jobs pattern: a major feature over the 10 year period to 2011 was no growth in jobs held by males and an increase in jobs in sectors that mainly employ females, and that tend to have high levels of part-time employment. The total jobs for males have been static over the decade (2001-11) and the jobs for females increased (by 187 jobs or 28%), with most of this growth occurring over the period 2001-2006 (145 additional jobs). Total jobs held by females increased from 670 in 2001 to 857 in 2011. For males the number of jobs was 820 in 2001 and 825 in 2011.

Females are concentrated in in-person services jobs (76% of these jobs were held by females in 2011) and these are the jobs that have been increasing in the LGA over the last decade (eg. jobs in health care and social assistance; education and training; retail trade; and in accommodation and food service).

Table 26. Jobs in the Region - Break O'Day LGA 2001-2011

Break O'Day LGA				Change	Change	Change	% Change
Jobs	2011	2006	2001	2001-06	2006-11	2001-11	2001-11
Males	825	822	820	2	3	5	0.6
Females	857	813	670	143	44	187	27.9
Persons	**1682**	**1635**	**1490**	**145**	**47**	**192**	**12.9**

Source: ABS Census 2011 - Working Population Data Time Series

The following table shows the changes in total job numbers for persons in different industry sectors and the performance in the two periods. The growth in employment between 2001 and 2006 was strong and mainly focused in in-person services employment that was servicing the local market. Much of this jobs growth was concentrated in the major centre of St Helens.

The loss in jobs held by males has mainly been full time jobs, while much of the growth in jobs held by females has been mainly part-time employment. Females hold 76% of the jobs in the sectors that have been growing, while around half of males are employed in the sectors that have been contracting.

Table 27. Job Trends by Industry -Break O'Day LGA 2001-2011

Break O'Day LGA	2011	2006	2001	Change	Change	Change
Jobs 2001-2011 Industry	Persons	Persons	Persons	2001-06	2006-11	2001-11
Goods Producing						
Agriculture, forestry and fishing	177	234	277	-43	-57	-100
Mining	66	60	70	-10	6	-4
Manufacturing	100	95	70	25	5	30
Electricity, gas, water and waste services	23	12	13	-1	11	10
Construction	94	90	60	30	4	34
Total	**460**	**491**	**490**	**1**	**-31**	**-30**
Goods Related Services						
Wholesale trade	37	26	48	-22	11	-11
Transport, postal and warehousing	85	61	37	24	24	48
Total	**122**	**87**	**85**	**2**	**35**	**37**
In Person Services						
Retail trade	225	212	227	-15	13	-2
Accommodation and food services	198	214	150	64	-16	48
Education and training	173	159	129	30	14	44
Health care and social assistance	202	184	139	45	18	63
Administrative and support services	22	24	0	24	-2	22
Public administration and safety	118	94	65	29	24	53
Arts and recreation services	18	12	26	-14	6	-8
Other services	36	42	53	-11	-6	-17
Total	**992**	**941**	**789**	**152**	**51**	**203**
Business Services						
Financial and insurance services	22	21	8	13	1	14
Rental, hiring and real estate services	32	30	18	12	2	14
Professional, scientific and technical services	37	33	38	-5	4	-1
Information media and telecommunications	9	16	22	-6	-7	-13
Total	**100**	**100**	**86**	**14**	**0**	**14**
Inadequately described/Not stated	8	16	0	16	-8	8
Total All	**1682**	**1635**	**1490**	**145**	**47**	**192**

Source: ABS Census 2011, Working Population Data Time Series

The major slowdown in jobs growth in 2006-11 reflects a combination of factors: continued declines in some traditional areas of employment (goods producing sectors); the GFC and general slowdown in the economy; and a contraction in the visitor market (a fall in visitors to Tasmania and to the East Coast). Visitor numbers have been impacted by a slowdown in the domestic market and by the high Australian dollar and low airfares making international travel attractive.

3.3.2 Key Drivers

In summary the jobs situation has been affected by a number of factors:

- Goods producing industries - a long term decline in traditional resource sectors (forest products and seafood) as a combination of environmental regulation and changes in market situations impact on supply and demand conditions.
- A period of strong population growth (2001-2006) driving growth in demand for in-person services and leading to an increase in local service jobs.
- A growth period for Tasmanian tourism (2001-2006), with strong visitor numbers and increased levels of activity on the East Coast.

Given the two major drivers of the regional economy are population and tourism, a slowdown in each of these has produced major impacts on Break O'Day with a flat period for jobs growth (2006-2011). Another major factor is that the jobs lost in the resource based sectors (forestry, fishing, agriculture) were held mainly by males and there has been no growth in male jobs in the period for those displaced (other than an increase in some local manufacturing jobs and a few construction jobs).

There is a clear two-way linkage between population growth and jobs. A loss of jobs and no replacement jobs encourages people/families to move out of the area to other locations that offer better job prospects. This out migration slows the overall growth of the population (and reduces the local market for services). The lack of jobs also discourages persons from moving into the area, other than persons moving for retirement. This slowdown in the regional economy has led to a shakeout in some local businesses.

Table 28. Job Trends by Sector- Change in Number of Jobs - Break O'Day LGA 2001-2011

Break O'Day LGA	2001-06		2006-11		2001-11	
Jobs 2001-2011	Change		Change		Change	
Industry	Males	Females	Males	Females	Males	Females
Goods Producing						
Agriculture, forestry and fishing	-45	2	-39	-18	-84	-16
Mining	-12	2	5	1	-7	3
Manufacturing	5	20	4	1	9	21
Electricity, gas, water and waste services	-1	0	8	3	7	3
Construction	27	3	0	4	27	7
Total	**-26**	**27**	**-22**	**-9**	**-48**	**18**
Goods Related Services						
Wholesale trade	-15	-7	10	1	-5	-6
Transport, postal and warehousing	22	2	14	10	36	12
Total	**7**	**-5**	**24**	**11**	**31**	**6**
In Person Services						
Retail trade		1	6	7	-10	8
Accommodation and food services	15	49	4	-20	19	29
Education and training	5	25	-4	18	1	43
Health care and social assistance	2	43	0	18	2	61
Administrative and support services	6	18	3	-5	9	13
Public administration and safety	11	18	9	15	20	33
Arts and recreation services	-4	-10	3	3	-1	-7
Other services	-4	-7	-6	0	-10	-7
Total	**15**	**137**	**15**	**36**	**30**	**173**
Business Services						
Financial and insurance services	3	10	-3	4	0	14
Rental, hiring and real estate services	6	6	-1	3	5	9
Professional, scientific and technical services	-6	1	4	0	-2	1
Information media and telecommunications	-4	-2	-5	-2	-9	-4
Total	**-1**	**15**	**-5**	**5**	**-6**	**20**
Inadequately described/Not stated	13	3	-9	1	4	4
Total All	**2**	**143**	**3**	**44**	**5**	**187**

Source: ABS Census 2011, Working Population Data Time Series

The following table shows the pattern of full time and part-time jobs. Of the total 1676 jobs: around 50% (827 jobs) were part-time (defined as less than 34 hours) and half (821 jobs) were full time (35 hours or more). Of the jobs held by males, 33% were part-time and 64% were full time; and for jobs held by females 65% were part-time and 34% were full time.

Table 29. Hours Worked by Sex - Break O'Day LGA 2011

Break O'Day LGA										
Jobs 2011	None	1-15 hours	16-24 hours	25-34 hours	35-39 hours	40 hours	41-48 hours	49 hours and over	Hours Not stated	Total
Males (no)	45	86	56	89	145	134	98	152	18	823
Share (%)	5.5	10.4	6.8	10.8	17.6	16.3	11.9	18.5	2.2	100.0
Share (%)				**<34 hours 33.5**				**35+ hours 64.3**		
Females (no)	69	187	164	131	98	74	40	80	10	853
Share (%)	8.1	**21.9**	**19.2**	**15.4**	11.5	8.7	4.7	9.4	1.2	100.0
Share (%)				**<34 hours 64.6**				**35+ hours 34.2**		
Persons (no)	114	273	220	220	243	208	138	232	28	1676
Share (%)	6.8	16.3	13.1	13.1	14.5	12.4	8.2	13.8	1.7	100.0
Share (%)				**<34 hours 49.3**				**35+ hours 49.0**		

Source: ABS Census 2011, Working Population Data

3.4 Location of Jobs

3.4.1 Jobs and Employed Residents

Comparisons of jobs located in the area with the number of residents in employment (and the sectors they work in) provide an indicative measure for job commuting within the broader region.

In 2011 there were 1682 jobs in the LGA and 2006 employed residents, a difference of 324 jobs. This implies that a number of persons are travelling to jobs outside of the LGA (to adjacent LGAs). The actual movements would be higher as there would be a number of persons from outside the LGA travelling to their jobs in Break O'Day.

The typical pattern is that females tend to hold local jobs in the service sector, while males are more likely to travel to jobs in adjacent areas (eg. as tradespersons in construction, forestry workers, and persons employed in processing plants).

Another element of business and employment is home based businesses. From ABS Census data this was estimated at 143 persons in 2011 (7% of employed persons) and the data indicates a decline from 198 persons in 2001. The data also show that home based employment involves both males and females and that the main age ranges are persons aged 35-54 years and 55-64 years. The latter age group may indicate persons transitioning to retirement by operating a business from home.

Table 30. Jobs and Employed Residents - Break O'Day LGA 2011

Break O'Day Jobs and Employed Residents 2011	Jobs In LGA	Employed Residents In LGA	Difference		
Industry	**Persons**	**Persons**	**Persons**	**Males**	**Females**
Goods Producing					
Agriculture, forestry and fishing	177	250	-73	-65	-8
Mining	66	76	-10	-11	1
Manufacturing	100	111	-11	-7	-4
Electricity, gas, water and waste services	23	26	-3	-3	0
Construction	94	157	-63	-60	-3
Total	**460**	**620**	**-160**	**-146**	**-14**
Goods Related Services					
Wholesale trade	37	47	-10	-8	-2
Transport, postal and warehousing	85	96	-11	-12	1
Total	**122**	**143**	**-21**	**-20**	**-1**
In Person Services					
Retail trade	225	214	11	8	3
Accommodation and food services	198	211	-13	0	-13
Education and training	173	185	-12	-9	-3
Health care and social assistance	202	230	-28	-3	-25
Administrative and support services	22	39	-17	-11	-6
Public administration and safety	118	126	-8	-2	-6
Arts and recreation services	18	23	-5	-3	-2
Other services	**36**	**46**	**-10**	**-7**	**-3**
Total	**992**	**1074**	**-82**	**-27**	**-55**
Business Services					
Financial and insurance services	22	26	-4	-2	-2
Rental, hiring and real estate services	32	35	-3	2	-5
Professional, scientific and technical services	37	48	-11	-6	-5
Information media and telecommunications	9	14	-5	-5	0
Total	100	123	-23	-11	-12
Inadequately described/Not stated	8	46	-38	-29	-9
Total All	**1682**	**2006**	**-324**	**-233**	**-91**

Source: ABS Census 2011 - Working Population Data and Resident Population Data

Table 31. Home Based Businesses Estimates - Break O'Day LGA 2011

Break O'Day LGA	2011	2006	2001
Home Based Businesses			
Persons	143	163	198
% employed residents	7.1%		

Source: ABS Census 2011, Working Population Data

The ABS does not publish working population data (jobs data) below the level of local government areas. It provides the residential population data (at a town level), which shows the home location of employed residents. In 2011 78% of employed residents were resident in coastal areas and 22% lived in inland areas. Over 45% of employed persons live in the St Helens/Stieglitz area.

Table 32. Employed Residents by Residential Location - Break O'Day LGA and Towns 2011

Employed Residents 2011				Shares		
Location	**Males**	**Females**	**Persons**	**Males**	**Females**	**Persons**
Break O'Day LGA	1058	948	2006			
Coastal						
St Helens	368	363	731	34.8	38.3	36.4
Stieglitz	93	93	186	8.8	9.8	9.3
Binalong Bay	34	34	68	3.2	3.6	3.4
Ansons Bay /Pyengana	69	54	123	6.5	5.7	6.1
Beaumaris	25	27	52	2.4	2.8	2.6
Scamander	144	128	272	13.6	13.5	13.6
Falmouth/ Four Mile Creek	48	40	88	4.5	4.2	4.4
Seymour	25	27	52	2.4	2.8	2.6
Total	**806**	**766**	**1572**	**76.2**	**80.8**	**78.4**
Inland						
St Marys	110	120	230	10.4	12.7	11.5
Fingal	69	42	111	6.5	4.4	5.5
Mathinna	41	18	59	3.9	1.9	2.9
Other	32	2	34	3.0	0.2	1.7
Total	**252**	**182**	**434**	**23.8**	**19.2**	**21.6**
Total Coast & Inland	**1058**	**948**	**2006**	**100.0**	**100.0**	**100.0**

Source: ABS Census 2011 - Resident Population Data

Given the role of each of the locations and their industry structure, the location of jobs does not align with resident location for many of the places (which are residential or agricultural areas with a limited number of businesses and jobs).

3.4.2 Jobs by Location

The following table provides some estimates of jobs by industry and location (the towns and the areas around the towns). This is based on a review of each of the locations and the activities in the town and surrounding area (from visits), and an estimate of jobs using the ABS 2011 jobs data as a base.

The St Helens area has an estimated 928 jobs (56% of jobs in the LGA), St Marys area 239 jobs (14%) and Fingal area 167 jobs (10%).[18] St Helens (as the main centre in the region) has the major share of jobs overall (56%) and dominates in a number of sectors including: manufacturing and wholesaling (in the industrial estate); business services; retail; local government services; and education. The jobs that are located in other areas include: agriculture; forestry; mining (Fingal); local retail; health (St Marys hospital and health services); education (primary and secondary); and accommodation and food services.

18 These are jobs at June 30 2011 and therefore do not take account of casual jobs during the peak tourist season (summer/autumn).

Table 33.Jobs by Location (Estimates) - Break O'Day LGA 2011

Break O'Day LGA Job Estimates													
Industry	St Helens	Stieglitz	Binalong Bay	Ansons Bay	Scamander	Beaumaris	Falmouth	Seymour	St Marys	Pyengana	Fingal	Mathinna	Total LGA
Goods Producing													
Agriculture, forestry and fishing	10	10	8	5	10	0	25	15	30	20	25	19	177
Mining											60	6	66
Manufacturing	80								8	12			100
Electricity, gas, water and waste services	23												23
Construction	40	10	4	4	4	0	5		14		8	5	94
Total	**153**	**20**	**12**	**9**	**14**	**0**	**30**	**15**	**52**	**32**	**93**	**30**	**460**
Goods Related Services													
Wholesale trade	25								5		4	3	37
Transport, postal and warehousing	50	4							12		15	4	85
Total	**75**	**4**	**0**	**0**	**0**	**0**	**0**	**0**	**17**		**19**	**7**	**122**
In Person Services													
Retail trade	140		8	8	8		8	5	24		12	12	225
Accommodation and food services	100	6	6	6	18	5	32		15		5	5	198
Education and training	85								46		22	20	173
Health care and social assistance	150								40		6	6	202
Administrative and support services	16								6				22
Public administration and safety	100								10		4	4	118
Arts and recreation services	14								4				18
Other services	10	2	2	2	2		2	2	6		4	4	36
Total	**615**	**8**	**16**	**16**	**28**	**5**	**42**	**7**	**151**		**53**	**51**	**992**
Business Services													
Financial and insurance services	18								4				22
Rental, hiring and real estate services	28								4				32
Professional, scientific and technical services	25								8		2	2	37
Information media and telecommunications	6								3				9
Total	**77**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**19**		**2**	**2**	**100**
Inadequately described/Not stated	8												8
Total All	**928**	**32**	**28**	**25**	**42**	**5**	**72**	**22**	**239**	**32**	**167**	**90**	**1682**
Share (%)	**55.2**	**1.9**	**1.7**	**1.5**	**2.5**	**0.3**	**4.3**	**1.3**	**14.2**	**1.9**	**9.9**	**5.4**	**100.0**

Source: MCa estimates based on ABS Census 2011 Working Population data and town visits

3.5 Unemployment

Unemployment declined dramatically during the growth period 2001-2006. However the rate has increased over the last 3 years, which reflects the structural change in jobs availability in the region and the flattening in the regional economy. Recent DEEWR data shows unemployment has increased from 6.0% in mid-2009 to 9.5% in 2012.

Table 34. Unemployment - Break O'Day LGA 2001-2011

Labour Force	2001 Census			2006 Census			2011 Census		
BO'D LGA	Males	Females	Persons	Males	Females	Persons	Males	Females	Persons
Unemployed, looking for work	216	113	329	115	82	197	151	80	231
Unemployment rate (%)	18.3	13.3	16.2	9.6	8.3	9.0	12.5	7.8	10.3

Source: ABS Census 2011 Resident Population Time Series Data

Table 35. Unemployment Estimates - Break O'Day LGA 2006-2013

Unemployment	2006	2007	2008	2009	2010	2011	2012	2013
Break O'Day LGA	June Qtr.	June Qtr.	June Qtr.	June Qtr.	June Qtr.	June Qtr.	June Qtr.	June Qtr.
Unemployed persons	217	206	186	153	241	235	254	264
Unemployment rate	9.1	8.7	7.7	6.0	9.4	9.0	9.8	10.3

Source: Dept. Employment, Small Area Labour Market Data December 2013

4. Major Industry Sectors

This section provides information on the key sectors that make up the Break O'Day regional economy. These industries include resource based industries - forestry, agriculture, mining, fishing; goods producing industries - manufacturing and construction; and service industries.

Resource Based Industries	Goods Producing Industries	Service Industries
Agribusiness	Manufacturing	Tourism
Seafood	Construction	Retail
Forest Products		Business Services
Mining		Government Funded Services

4.1 Agribusiness Industries

4.1.1 Overview-Northern Region

The Northern Region supports a wide range of agribusiness activities including: sheep, beef cattle, and dairy farming; intensive agriculture (eg. poultry and feedlots); wine, fruit, vegetables and nuts; and organic and boutique production (eg. olive oil).[19] The activities in the region vary from large scale commercial operations to smaller scale hobby farms.

The estimated value of agricultural output (EVAO) for the broader Northern Region in 2008 was $328 million. Major locations for agriculture in this region are: Northern Midlands ($121m); Dorset ($86m); and Meander Valley ($105m). Break O'Day had an estimated agricultural output of $15 million (farm gate value) in 2008.

Source: Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P10

19 Agricultural Profile Regional Summary of Northern Tasmanian Municipalities AK Consultants, December 2010

4.1.2 Regional Production and Employment

Production

Major activities in the broader region are:

- Livestock industries ($208 million) covering: cattle $79.5 million (mainly in Northern Midlands, Dorset and Meander Valley); sheep $ 24.5 million (mainly Northern Midlands and Meander Valley) and $34 million wool (mainly Northern Midlands); and milk $69 million (mainly Meander Valley and Dorset). Dairying is focused in Dorset and in Meander Valley. Beef is particularly important in Northern Midlands, Dorset and Meander Valley. Sheep (for slaughter and wool) is mainly located in Northern Midlands LGA.
- Horticulture ($170 million) covering: vegetables $61.5 million (mainly Meander Valley, Northern Midlands and Dorset); hay crops $44 million (linked to livestock sector – Meander Valley, Northern Midlands and Dorset); broad acre crops $31.5 million (mainly Northern Midlands, Meander Valley and Dorset); fruit $12.5 million (West Tamar and Georgetown); poppies $10.5 million (mainly Northern Midlands and Meander Valley); and nurseries and cut flowers $10 million (spread across the region). Broad acre cropping (includes cereals, oil seeds-including canola), pasture seeds is mainly conducted in the Northern Midlands and Meander Valley LGAs. Vegetables are concentrated in Meander Valley and Northern Midlands, and Dorset. Fruit production (includes grape vines) is the highest contributor in West Tamar, Georgetown and Launceston.
- Grazing of pasture (livestock) and fodder crops will continue to be the main agricultural use of land. Combined these activities represent $252 million of agricultural output in the region.
- Nurseries and cut flowers are relatively small activities that are spread across the region and involve a small number of businesses.
- Break O'Day's major agribusiness activities are: livestock ($11 million) - cattle, dairy and sheep; and small holdings of horticulture (total $4 million), which includes wine, vegetables and fruit.

Table 36. Estimated Value of Agricultural Output (EVAO) by Activity and LGA – Northern Region 2008 ($million)

Estimated Value of Agricultural Output (EVAO) $M	Break O'Day	Dorset	Flinders	Georgetown	Launceston	Meander Valley	Northern Midlands	West Tamar	Total
Livestock									
Sheep	1	2	2	1	1	5	12	0.5	24.5
Cattle	5	19	7.5	2.5	3	16	24	2.5	79.5
Wool	2	2	2.5	1	1	4	22	0	34.5
Milk	3	29	0	0	1	34	1	1.5	69.5
Total Livestock	**11**	**52**	**12**	**4.5**	**6**	**59**	**59**	**4.5**	**208**
Horticulture									
Hay Crops	2	9	1	0.5	2	14	13	2.5	44
Nurseries & Cut Flowers	1	2	1	0	2	1	1	2	10
Poppies	0	1	0	0	0	2.5	7	0	10.5
Vegetables	0.5	16	0	0	0	23	22	0	61.5
Fruit	0	0	0	5	2.5	0	0	5	12.5
Broad Acre Crops	0.5	6	0	0	0	6	19	0	31.5
Total Horticulture	**4.0**	**34.0**	**2.0**	**5.5**	**6.5**	**46.5**	**62**	**9.5**	**170**
Total Agriculture	**15.0**	**86.0**	**14.0**	**10.0**	**12.5**	**105.5**	**121.0**	**14.0**	**378.0**

Source: Agricultural Profile Regional Summary of Northern Tasmanian Municipalities AK Consultants, Dec 2010 P27-29

Employment

In 2008 in the Northern Region there were 2500 persons employed in agriculture and an additional 377 in the forestry and logging activities. The agricultural sector represents 6% of the employment in the Region. Excluding Launceston LGA, agriculture represents 12% of the employment in the balance of the region, and forestry and logging adds another 1%. Agriculture around Launceston includes plantation forestry (35% of agriculture employment).

Table 37. Employment by Industry Sector – Northern Region 2008

Industry	Break O'Day	Dorset	Flinders	Georgetown	Launceston	Meander Valley	Northern Midlands	West Tamar	Total
Agriculture	132	509	110	89	226	666	578	190	2500
Forestry & Logging	39	112	0	12	123	45	37	9	377
Fishing	21	9	6	3	21	3	3	7	73
Agric, Forestry & Fishing Support	45	44	3	3	80	55	53	41	324
Total Agriculture / Forestry/ Fishing	**237**	**674**	**119**	**107**	**450**	**769**	**671**	**247**	**3274**
Other Sectors	1399	1881	280	2506	32047	3846	2921	3124	48004
Total Employment	1636	2555	399	2613	32497	4615	3592	3371	51278
% in Employed in Agriculture	**14.5%**	**26.4%**	**29.8%**	**4.1%**	**1.4%**	**16.7%**	**18.7%**	**7.3%**	**6.4%**

Source: Agricultural Profile Regional Summary of Northern Tasmanian Municipalities AK Consultants, Dec 2010 P27-29

4.1.3 Break O'Day LGA

Production

The value of production of agricultural products was around $15 million in 2008, with production of $86 million in the adjacent area of Dorset LGA.

Table 38. Estimated Value of Agricultural Output (EVAO) by Activity and LGA -Break O'Day and Dorset 2008 ($ million)

Estimated Value of Agricultural Output (EVAO)	Break O'Day LGA $M	Dorset LGA $M	Total LGAs $M
Livestock			
Sheep	1	2	3
Cattle	5	19	24
Wool	2	2	4
Milk	3	29	32
Total Livestock	**11**	**52**	**63**
Horticulture			
Hay Crops	2	9	11
Nurseries & Cut Flowers	1	2	3
Poppies	0	1	1
Vegetables	0.5	16	16.5
Fruit	0	0	0
Broad Acre Crops	0.5	6	6.5
Total Horticulture	**4**	**34**	**38**
Total Agriculture	**15**	**86**	**101**

Source: Agricultural Profile Regional Summary of Northern Tasmanian Municipalities AK Consultants, Dec 2010 P27-29

Table 39. Agricultural Commodities - Break O'Day LGA 2006

Agricultural Commodities		Year ended June 2006
Total area		
Area of holding	ha	60,003.2
Cereals for grain	ha	463.0
Vegetables for human consumption	ha	59.3
Orchard trees (including nuts)	ha	12.0
All fruit (excluding grapes)	ha	12.0
Non-cereal broad acre crops	ha	116.3
Total number		
Sheep and lambs	no.	83 ,735
Milk cattle (excluding house cows)	no.	2 555
Meat cattle	no.	15 ,824
Pigs	no.	0
Gross Value of Agricultural Production		
Gross value of crops	$m	2.7
Gross value of livestock slaughterings	$m	6.7
Gross value of livestock products	$m	5.1
Total gross value of agricultural production	**$m**	**14.5**

Source: ABS National Regional Profile, Break O'Day (M), 2006-2010, November 2011

Employment

Employment in the sector in Break O'Day has declined from 132 persons in 2001 to 101 persons in 2011. By way of comparison Dorset LGA had 455 jobs in agriculture in 2011.

Table 40. Agriculture Sector Jobs- Break O'Day LGA 2001-2011

Sector Jobs	2011	2006	2001	Change 2001-2011
Agriculture	101	132	132	-31
Agriculture Support Services	8	6	4	4
Total	**109**	**138**	**136**	**-27**

Source: ABS Census 2001-2011, Working Population Data

Table 41. Agriculture Sector Jobs- Break O'Day LGA 2011

Sector Jobs	Males	Females	Persons
Agriculture	72	29	101
Agriculture Support Services	4	4	8
Total	**76**	**33**	**109**

Source: ABS Census 2011, Working Population Data

4.1.4 Key Issues - Agribusiness

Given the scale of the sector in Break O'Day, it is best to take a broader regional approach that includes the adjacent area of Dorset LGA. Some key issues for the region include diversification, value added production and workforce issues.

Appendix D provides a profile of the industry in the Northern Region and future development opportunities. Relative to other areas in the Northern Region, Break O'Day has a small agribusiness sector.

However the sector is of strategic importance in terms of the smaller towns and for tourism in the region. Major operations are Pyengana Dairy, Pyengana Premium Meats, Eureka Farm (Scamander), and White Sands Estate (wine and Iron House Brewery).

Tasmania's positioning in agribusiness is primarily in the premium segment (eg. branded beef, cheeses, wines, vegetables and fruit). There are a wide range of farm gate operations (with production of value-added products), which link the sector strongly to tourism activity (as major attractions or as part of regional food trails).

A major issue in the agribusiness sector is a sustainable workforce for operations, harvesting and processing. The skill issue covers: succession planning with older farmers exiting the sector; development of farm workforce plan including a regional farm labour pool and the development of processing skills (eg. vegetables, fruit, wine, cheese). [20]

20 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

Key Issues: Agribusiness	
Issue	**Direction/Actions**
Maintain the sector	**Maintain - Major Activities** - Ensure that current major activities in the region are maintained (meat, dairy) and developed. - Council to have an active engagement with the agribusinesses in the LGA. - Ensure that any proposed expansions of operations are facilitated. -Take a regional approach to industry development in partnership with other Councils in the Northern Region.
Diversify activity	**Diversify - Agribusiness** There is potential for further development of horticulture production in the region: - Vines and viticulture - major potential for development of premium cool climate wines in the East Coast Region.[21] White Sands Estate is developing major plantings of new wines. - Nurseries and cut flowers have potential in the region. - Poppies - processors are expanding and require increased production from growers (improved productivity and new plantings). - Fruit - there is the potential to develop fruit production (eg. berries, cherries, nuts and stone fruit). There has been major investment in the Northern Region in production of fruit (Driscoll's /Costa Group). **Processing** Major processing plants are in the north of the region. Break O'Day is unlikely to be considered for a major manufacturing plant. Boutique processing operations exist in the LGA (Pyengana Dairy - cheese; Eureka Farms - sauces, jams etc.; White Sands Estate - wine and Iron House Brewery; Pyengana Premium Meats – premium beef and lamb.) There is potential to develop value-added operations in the area.
Farm gate sales	**A Food Trail** The boutique processing operations are part of farm gate sales operations and have a significant tourism component to their sales (eg. Pyengana Dairy/Holy Cow Café; White Sands Estate; Eureka Farm). There is the potential to link these activities as part of a regional food and wine trail and make them a focus of tourism promotion.
Regional approach	**A Broader Approach** -There is a need to take a regional approach to development of agribusiness activity. This includes working together with the Northern Region Councils (include Dorset).
Recognise constraints	**Act on Constraints** There is a need to take action on constraints that limit development within the region. This includes: the availability of some support services; and workforce issues. From a planning perspective, there is a need to ensure that development is facilitated; and that relevant land use zonings are maintained. Workforce strategy - there is a need for Break O'Day to be involved with others in the Northern Region on the industry skill strategy covering: a regional farm labour pool; develop of skills training for growers and for value added processing (vegetables, fruit, wine, cheese).[22]

21 Potential for Growth of the Tasmanian Wine Sector -....might it become the Pinot Isle?; Dr. Richard E Smart, Smart Viticulture and RuralSmart, Launceston 2010. Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA Regional Economic Development Plan: Northern Tasmania Wine Sub-sector Profile P148

22 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

4.2 Seafood Industry

4.2.1 Overview

The commercial sector in Break O'Day comprises a fishing fleet and aquaculture operations. Break O'Day is a major centre for recreational fishing and this is a major attractor of visitors to the area.

Commercial Fishing: The Tasmanian commercial fishing industry supplies around 26% of Australian seafood, and seafood accounts for one third of Tasmania's primary products. The fishing industry is regulated with quota arrangements, and the main fishing ports are Hobart, Margate, St Helens, Devonport and Stanley. Other fishing ports are Bicheno, Strahan and Dover. In 2008, the gross value of fisheries production for wild-catch fisheries was estimated at $156.7 million and for aquaculture at around $319 million. Major products are rock lobster and abalone, which have significant export markets. The *"beach"* or landed value of abalone, rock lobster and Atlantic salmon accounts for 92% of the gross value of seafood production in Tasmania.

There has been a decline in deep-sea scale fish, due to pressure on fish stocks and environmental issues. The scale fish sector is seen as fully fished, with few opportunities for expansion. However, there are opportunities for further development of markets - in local consumption and for value-adding products.

Aquaculture: there has been a major increase in aquaculture (salmon, trout, oysters, mussels and abalone), with this segment now accounting for around half of employment in the seafood sector.

Recreational Fishing: recreational fishing (offshore, estuary and streams) activity has increased in the last decade. There are more large recreational boats (6 metres plus) with high tech equipment that mean recreational fishers have the capacity to fish much further offshore (for game fishing and deep sea fishing).[23] Surveys show that the recreational fish take has increased substantially.

4.2.2 St Helens Operations

Fishing Activity

St Helens is the largest town on the north-east coast. St Helens remains a centre for commercial fishing, charter fishing operations and recreational fishing. It is home to the Tasmanian Rock Lobster Fishermen's Association and to the St Helens Gamefishing Club.

While the area is a major attraction for recreational fishers, St Helens is also a popular dive location for its extensive kelp forests and underwater caves. St Helens provides access to Binalong Bay and to the Bay of Fires area.

Fishing activity covers both commercial fishing and recreational fishing, and there is a full range of fishing options. St Helens is recognised as the sport fishing capital of Tasmania and provides for estuarine and offshore fishing for most of the year.

- Game Fishing: the main period for game fishing is December-June, with species available including: Albacore tuna, Yellowfin tuna, Southern Bluefin tuna, Striped Marlin, Striped Tuna, Mako and Blue Shark. The St Helens Game Fishing Classic (held in March) continues to attract an increasing number of participants (including interstate visitors).
- Deep sea fishing is available all year with the main period being November-June. The species available include: Trevalla, Rays, Bream, Hapuku, Gemfish, Blue Grenadier, and Pink Ling. Deep see fishing is undertaken by large trailer boats and by some charter vessels that are based at St Helens.
- Estuary and bay fishing covers: Garfish, Bream and Flathead, with Salmon available in the January-June period. Rock and beach fishing is at its best in the September-May period.

23 Tasmanian Scalefish Fishery Review - Final Report to the Minister on the Review of the Scalefish Fishery Management Plan, August 2009

The current facilities comprise: five boat ramps that service the area, with three being located in Georges Bay; and the other two providing direct ocean access at Binalong Bay and Burns Bay (eliminating the need to cross the St Helens Barway).

- Georges Bay combines a range of fishing options with sheltered waters for small craft, launching facilities; wharfs and a marina. The availability of affordable accommodation is a major asset for the region.
- Scamander is a location for Rock Lobster, Flathead, Couta and Striped Trumpeter, Albacore, Southern Bluefin Tuna, Marlin, Australian Salmon and Bream. It offers year round fishing.

Commercial Fishing

A major study was conducted in 2007 in relation to access to Georges Bay.[24] The last 10-20 years have seen: a decline in the number of boats operating out of St Helens; a growth in tourism (recreational fishing and water based activities); and an increase in aquaculture - marine farming and some processing.

There has seen a major reduction in its commercial fishing fleet as a result of the decline in deep-sea fish stocks, the introduction of quotas and increased restrictions on commercial fishing catches. The decline of the scallop industry and the scaling back of other fisheries has resulted in a shift from commercial fishing for scale fish, to recreational fishing and farmed shellfish operations.

In 2007 there were 15 commercial fishing vessels based at St Helens with either rock lobster or scallop or both rock lobster and scallop licences (some also had other licences - king crabs, scale fish). Three boats based in St Helens were used to fish for scallops (with another 20 boats licensed to fish for scallops but being based at other Tasmanian ports or in Victoria).[25] Some of the non-local boats used St Helens to land fish and to re-supply their vessels.[26]

It was estimated that the rock lobster quota held by vessels based in St Helens was 140 tonnes and the scallop quota was 800 tonnes (shell weight). These tonnages represent about 10% of the total allowable catch (TAC) of rock lobster and 20% of the scallop TAC.

The 2007 study indicated that around $8 million of fish products was processed through St Helens. This comprised 500 tonnes of scallops (shell weight); 120 tonnes of rock lobsters; and scale fish and oysters. Processing employed 20 people year around and 33 in the scallop season. The fish processed in St Helens tended to be from vessels that are based in St Helens.[27]

Current Operations

Recent discussion with the industry indicate that in the 1990s there were around 50 boats using St Helens as a base, with around 100 crew and another 80 persons employed in 2 processing factories. This is now down to around 25 boats with around 40 crew.[28] Similarly the number of lobster boats operating in the area has declined from around 35 to 12.

The major current operators are: Suncoast Fisheries, Tasmanian Oceanic, Galaxy Fishing Co and Tasmanian Seafoods. Current estimates of the landed value of product in the region are: scale fish - $12-$15 million per year; and lobsters $30 million. Aquaculture has continued to expand and now employs around 25-30 people in the region.

The recent report by Burbury Consulting estimated the current direct economic value of the St. Helens fishing catch (landed at St. Helens wharf) at $27.5 million. This is composed of white fish, scallops, rock lobsters, abalone and aquaculture. [29]

Aquaculture

Aquaculture has expanded over the last 10-15 years with the number of operators increasing and with industry employment now at around 25 persons.

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24 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay , M M Starrs August 2007

25 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay, M M Starrs August 2007. In 2007 there were 23 scallop vessels and 221 rock lobster vessels fishing in Tasmania. P3

26 In 2006, 34 vessels unloaded rock lobster and 8 vessels unloaded scallops.

27 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay , M M Starrs August 2007

28 Some additional analysis of the sector was conducted in mid-2013, Marine Infrastructure Development Project for St Helens: Picnic Point and Barway- Investment Analysis /Business Case, Burbury Consulting July 2013. It was estimated that there were 22 boats operating in 2013.

29 Marine Infrastructure Development Project for St Helens: Picnic Point and Barway- Investment Analysis /Business Case, Burbury Consulting July 2013. It was estimated that there were 22 boats operating in 2013. P8

There are five aquaculture businesses operating in St Helens. The existing marine farm leases cover a total area of 40.2 ha. Two leases are located in inter-tidal waters, occupying an area of 30.2 ha. The species currently licensed for these two leases include Pacific oysters, native oysters and mussels. The remaining two leases are deep water areas occupying an area of 10.0 ha. and the species currently licensed to farm include Pacific Oysters, Native Oysters, Mussels and Clams.[30] These businesses employed a total of 28 persons in 2011.[31]

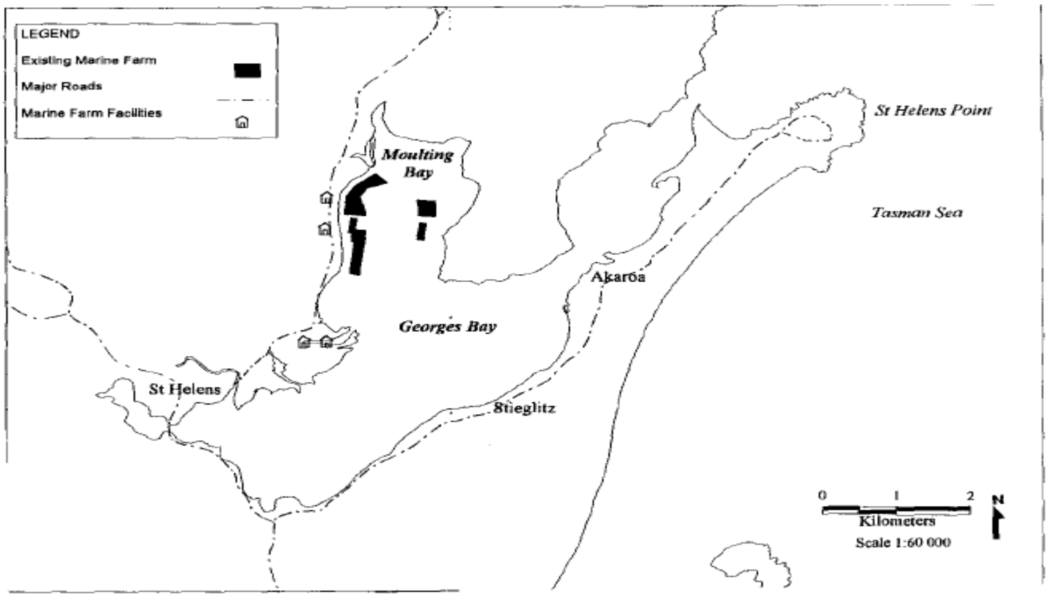
There is a range of facilities (jetties, packing sheds, offices and workshops) associated with the marine farms. Due to the nature of the shellfish species grown and that this product may be packed and transported live and fresh to markets, there is currently no major processing of farmed shellfish in the area.[32]

Table 42. Existing Marine Farm Leases in the Georges Bay/ Moulting Bay Areas

Business	Products	Location of Leases	Size (ha)
Geordy River Aquaculture	Pacific Oyster	Moulting Bay	
Mack Aquaculture	Pacific Oyster, Flay Oyster, Mussel, Clams	Moulting Bay	7.00
Lease 65 (Oysters)	Pacific Oyster	Moulting Bay	16.49
Tasmanian Eastcoast Mussels & Oysters	Pacific Oyster, Flay Oyster, Mussel, Clams	Moulting Bay	3.00
ST Helens Oysters Pty Ltd.	Pacific Oyster, Flay Oyster, Mussel, Clams	Moulting Bay	13.67
	Total		**40.16**

Source: Georges Bay Marine Farming Development Plan 1998 (Reviewed March 2008) (Modified November 20 20012), Water and Marine Resources Division, Department of Primary Industries, Parks, Water and Environment P12

Marine Farms and Facilities in Plan Area



Source: Georges Bay Marine Farming Development Plan 1998 (Reviewed March 2008/Modified November 2012), Water and Marine Resources Division, Department of Primary Industries, Parks, Water and Environment P14

Future Development

The Georges Bay Marine Farming Development Plan is one of a series of plans which have been prepared for the main aquaculture regions Tasmania. The Plan identifies areas of coastal water that may be suitable for marine farming, while taking into consideration other users of the coastal zone.

The Georges Bay Marine Farming Development Plan identifies five marine farming zones in the Georges Bay area. Some of these include existing farms sited that are suitable for industry expansion, along with other new sites for shellfish and seaweed culture. The Plan does not propose any zones for the culture of finfish.[33]

30 Georges Bay Marine Farming Development Plan 1998 (Reviewed March 2008) (Modified November 2012), Water and Marine Resources Division , Department of Primary Industries, Parks, Water and Environment P22

31 ABS Census 2011, Working Population

32 Georges Bay Marine Farming Development Plan 1998 Reviewed March 2008/Modified November 2012), Water and Marine Resources Division , Department of Primary Industries, Parks, Water and Environment P14

33 Georges Bay Marine Farming Development Plan 1998 (Reviewed March 2008/Modified November 2012), Water and Marine Resources Division , Department of Primary Industries, Parks, Water and Environment P22

There is potential for further development of aquaculture operations in the region.

Table 43. Zones for Future Development

Zone	Area	Species	Zone area (ha)	Maximum Leasable area (ha)	Existing lease area (ha)
1	Hodgmans spit	Shellfish, seaweed	31.00	25.00	0
2	East McDonalds Point	Shellfish, seaweed	24.49	10.00	0
4	Moulting Bay West	Shellfish, seaweed	31.43	30.16	30.16
5	Moulting Bay East	Shellfish, seaweed	19.76	16.00	10.001
6A	South West Pelican Point	Shellfish, seaweed	12.40	12.40	0
6B	South West Pelican Point	Shellfish, seaweed	8.299	8.299	0
Total			**127.379**	**101.859**	**40.161**

Source: Georges Bay Marine Farming Development Plan 1998 (Reviewed March 2008/Modified November 2012), Water and Marine Resources Division, Department of Primary Industries, Parks, Water and Environment P22

Employment

Jobs data show a decline in the number of persons employed in fishing over the ten years to 2011 (down 41 to 26) and an increase in aquaculture employment.

Table 44. Seafood Sector Jobs - Break O'Day LGA 2001-2011

Sector Jobs	2011	2006	2001	Change 2001-2011
Aquaculture	28	37	0	28
Fishing	26	22	67	-41
Total	**54**	**59**	**67**	**-13**

Source: ABS Census 2001-2011, Working Population Data

Table 45. Seafood Sector- Jobs Break O'Day LGA 2011

Sector Jobs	Males	Females	Persons
Aquaculture	21	7	28
Fishing	20	6	26
Total	**41**	**13**	**54**

Source: ABS Census 2011, Working Population Data

The 2007 study indicated that income generated by fishing activity in St Helens was estimated at $5.3 million per year, with over 80% generated by commercial fishing. This was due mainly to wages paid to crews and expenditure on repair and maintenance of vessels.[34]

Charter Operations

Several charter boat businesses were set up in the late 1990s, with tourism marketing (both national and international) highlighting St Helens as a major game fishing centre.[35]

In 2007 there were 11 boats involved in charter fishing operations (7 operators) at St Helens, with all of these being seasonal/part time operations. Estimates of total revenues were $500,000 per year.[36] Around 80% of revenues were earned in a 6-7 month period (eg. November to May).[37] Charter boat operations are typically small owner occupied businesses, with few employees. However charter operations and recreational fishing have impacts in terms of visitors and job opportunities in tourism accommodation, tourism activities, cafés and restaurants, and retail.

Discussions with the industry indicated that there are now only around 3-4 operators (and most of these are part-time/seasonal operations). There has been a decline in game fishing but an increase in demand for off-shore sports fishing and bay fishing (which can be more of a family activity). Charter fishing operations out of St Helens are sensitive to conditions on the barway, with trips having to be cancelled or rescheduled when conditions are poor.

34 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay , M M Starrs August 2007 P31
35 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay , M M Starrs August 2007 P27
36 This was based on assumptions of 450 days of charter fishing per year for 3280 passengers or 7 passengers per trip ($1,230 per trip).
37 Social and Economic Impacts Caused by Restrictions on Access to Georges Bay , M M Starrs August 2007 P27

There is potential to broaden the scope of activities associated with charter boat operations to include leisure cruising, bird and marine life viewing, and diving. [38] There is also an identified need for a boat hire business.

The development of the charter operations has seen St Helens promoted as a location for game and recreational fishing and some promotion of other activities including four wheel drive tours, surfing and scuba diving.

Marine Industries

St Helens has a small marine manufacturing and servicing sector, with Georges Bay Marine and Lyndcraft Boats located in the industrial estate.

4.2.3 Key Issues - Seafood Industry

Some key issues for the fishing sector are: maintaining the current commercial fishing and aquaculture operations; strengthening the recreational fishing activity, including charter operations; and developing port infrastructure.

Key Issues: Seafood	
Issue	**Direction/Actions**
Commercial Operations	**Maintain Activity** - Maintain St Helens as a commercial port for fishing activity. - Continued development of aquaculture operations, based on the Georges Bay Marine Farming Development Plan. - Extend fish loading and processing activity at St Helens. - Maintain St Helens as an operational port.
Charter Operations	**Charters** - Extend fishing charter operations (including boat hire). - Broaden charter offering to include leisure cruising, and bird and marine life viewing.
Recreation fishing	**Develop Recreational Fishing** -Continue to develop the area as a recreational fishing hub.\
Infrastructure	**Develop Port Infrastructure** - Extend and develop the marina and the wharf area. - Ensure boat servicing capacity is maintained as part of an active commercial port operation. - Access to the harbour (barway): retaining wall at Pelican Point, an extension to the existing Barway breakwater, and additional channel deepening/alignment. [39] - Develop facilities in Break O'Day as part of the broader regional infrastructure strategy. (Action 10.7 Develop an East Coast Marine Infrastructure Strategy in Northern Region Plan)[40]
East Coast Marine Infrastructure Strategy (Action 10.7 in in Northern Region Plan) [41]	DEDTA is partnering with Marine and Safety Tasmanian (MaST) and regional councils (Tasman, Sorell, Glamorgan Spring Bay and Break O'Day) to develop an *East Coast Marine Infrastructure Strategy*. This plan has a focus on requirements for recreational and commercial boating infrastructure (including private sector marina development, and the siting of onshore aquaculture and fishing operations). The plan will be a detailed framework to guide future investment decisions by private businesses. Recommendations include infrastructure projects in Break O'Day: St Helens Wharf replacement; improving parking arrangements at Burns Bay Boat Ramp; improving parking and access arrangements at the Binalong Bay Boat Ramp/Jetty; and investigating options to improve accessibility at the Stieglitz Boat Ramp.

38 The Right Bait - Social Contributions of Tourism Fishing Charter Operations to St Helens, Tasmania Prepared for the National Oceans Office October 2001 P6. The 2001 report indicated that tourism Fishing Charter Boat operations have replaced commercial fishing activity where it has contracted, and has created an essential tourism catalyst for the coastal community of St Helens.

39 Some additional analysis of the sector was conducted in mid-2013, Marine Infrastructure Development Project for St Helens: Picnic Point and Barway- Investment Analysis /Business Case, Burbury Consulting July 2013. It was estimated that there were 22 boats operating in 2013.

40 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P114-115

41 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P114-115

4.4 Forest Products

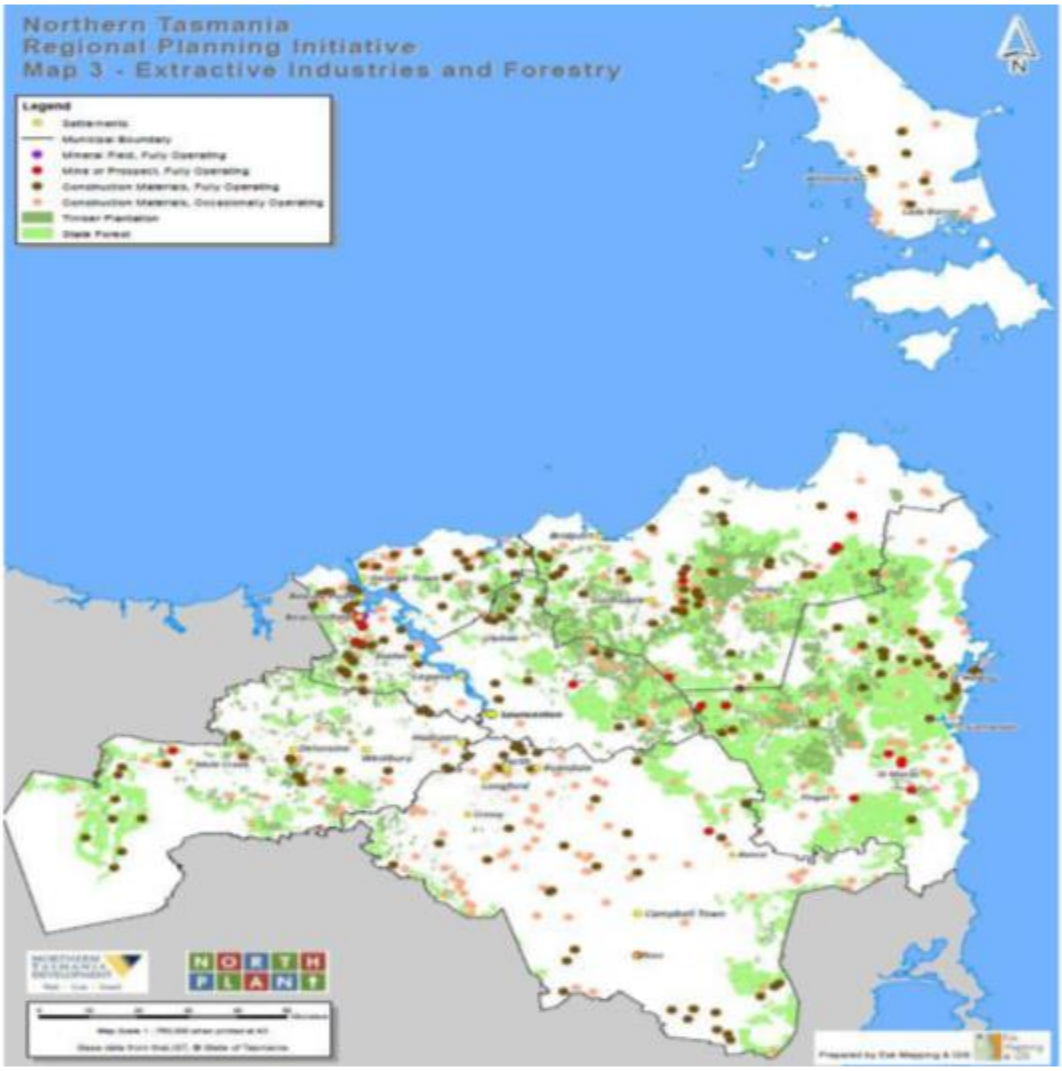
4.4.1 Overview

The Tasmanian forest products sector is an integrated industry that encompasses: both native forest and plantation resource (both softwood and hardwood); the production of logs, woodchips, hardwood and softwood sawn timber, speciality timbers; pulp and paper production; veneer; fuel wood and other wood products. The main export products are paper, woodchips, sawn timber products, timber veneer and forest management services.[42]

North East Tasmania is an important forest industry region in Australia. Significant areas of land are managed for timber production. The major component is in state forests (native forests), however private land is also leased by forestry companies for timber production (plantation forestry). This large scale commercial forestry (in both state forests and in private timber reserves) is regulated by Forestry Practices Plans.[43]

Forestry and logging covers activities in the growing and managing of forests, and harvesting trees. Wood and paper product manufacturing involves processing wood and paper products, and includes woodchip mills, sawmills, wood-based panel production, and pulp and paper production.

There has been a major fall in employment in the forestry industry in the period since 2008 and this has impacted on both Dorset LGA and Break O'Day LGA.



Source: Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P89

In 2006 a total of 1852 people were employed in the North East Tasmania forest industry. This includes people employed in forestry and logging and in wood and paper product manufacturing (but not in the

42 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA Regional Economic Development Plan: P149

43 Vision East 2030 - The East Coast Land Use Framework - December 2009

transport of logs, and some silvicultural contractors). Of these forestry industry employees, 37% (691 people) were worked in Launceston LGA and 24% in Dorset LGA (449 people).

Around two thirds of persons employed in the sector in 2008 were in wood and paper product manufacturing, while 34% were employed in forestry and logging activities. North East Tasmania had a greater reliance on plantation employment than Tasmania as a whole (with around 40% of workers in plantation forests and 60% worked in native forestry).[44]

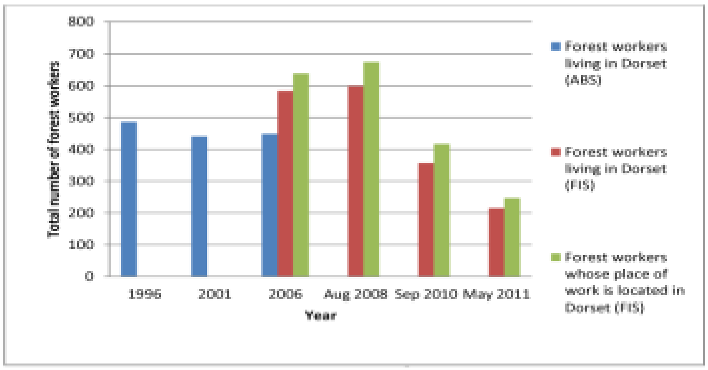
Plantation sector employment was largely based in Dorset LGA, where there were a number of softwood processing facilities. Since 2008 there have been significant job losses due to the closure of several of these softwood milling operations .Forest products jobs located in Break O'Day were mainly in the native forestry sector, however it there are several large areas of plantations in the LGA.

4.4.2 Forest Products Industry Changes

The Tasmanian forest industry has experienced major change since 2008, with an estimated 3500 jobs lost in the period from August 2008 to May 2011. This has resulted in significant social and economic impacts for the communities that are dependent on forestry.[45]

- Dorset LGA: With a population of around 7000, the area has been highly dependent on the forest industry (particularly softwood sawmilling operations) for employment. Dorset LGA has been affected by the changes in the sector: in 2006, 19% of the LGA's labour force was employed in the forest industry (primarily in the two softwood sawmills) and this fell to 6% by May 2011. Employment declined from over 600 in 2006 to just over 200 workers in May 2011.
- Break O'Day: only 2.4% of Break O'Day jobs were in the forest industry (in 2006) and this fell to 1.5% in 2011. Most of jobs in the sector were based in the Fingal Valley. However a significant number residents travelled from areas around St Marys to forest products jobs in Dorset.
- In all, 65% of the Dorset forest industry jobs and 43% of the Break O'Day forest industry jobs have been lost since 2008.
- As a consequence of these changes, a major concern in the Dorset area is the ageing of the population and a high level of out-migration of people in the 15-30 year age group. This has impacts, on population ageing, the local labour force, and on the provision of services.

Trends in Forest Industry Employment, Dorset LGA



Source: Community Wellbeing Needs Analysis December 2011 - Report to Rural Alive and Well (RAW)
Fenner School of Environment and Society, Australian National University P12

4.4.3 Break O'Day - Forest Products Industry

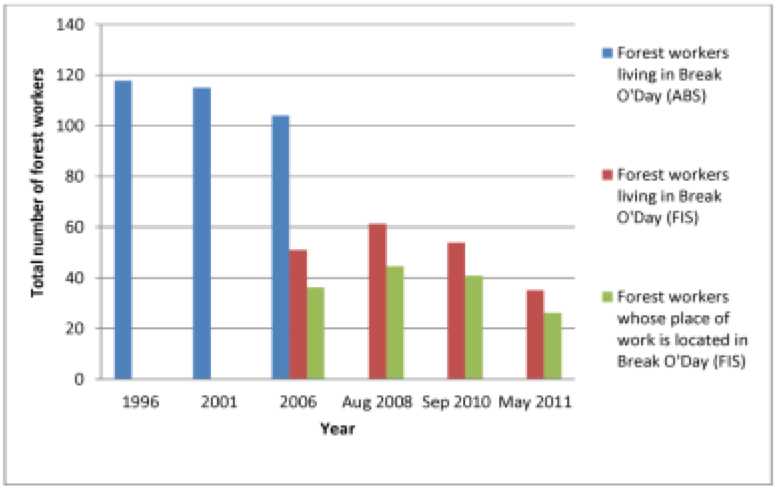
Break O'Day had limited forest sector employment (mainly located in the Fingal Valley). Only 2.4% of Break O'Day jobs were in the forest industry in 2006, with this falling to 1.5% in 2011. In Break O'Day the majority of jobs (69%) were in native forests and were involved in in harvest and haulage contracting. In Dorset, most of the job losses were in the plantation sector and associated wood processing (as a consequence of the closure of two of the softwood sawmills).

44 Monitoring the social and economic impacts of forestry: A case study of north east Tasmania , Report for Department of Agriculture, Fisheries and Forestry by the Fenner School of Environment and Society, Canberra June 2008 Pii-iii

45 Community Wellbeing Needs Analysis December 2011 - Report to Rural Alive and Well (RAW) Fenner School of Environment and Society, Australian National University

The following table shows the number of forest workers living in Break O'Day - in 2006 there were 100 forest workers but only around 37 jobs located in the LGA (most forest industry workers travelled to adjacent LGAs).

Trends in Forest Industry Employment, Break O'Day LGA



Source: Community Wellbeing Needs Analysis December 2011 - Report to Rural Alive and Well (RAW)
Fenner School of Environment and Society, Australian National University P13

The number of forestry jobs located in Break O 'Day LGA dropped from 74 in 2001 to 14 jobs in 2011. However up to 70 persons were travelling to jobs in Dorset (but lived in Break O'Day). For Break O'Day residents the overall job losses were around 90+ jobs (23 jobs located in Break O'Day and around 70 jobs that residents travelled to in Dorset).

In 2011 there were only 14 jobs in forestry and logging located in Break O'Day (down from 74 in 2001).There were a total of 12 jobs in wood product manufacturing. The only saw milling operation is McKay's Sawmill located in the St Helens industrial estate.

Table 46. Forest Products Sector Jobs - Break O'Day LGA 2001-2011

Sector Jobs	2011	2006	2001	Change 2001-2011
Forestry and logging	14	37	74	-60
Total	14	37	74	-60

Source: ABS Census 2001-2011, Working Population Data

4.4.4 Key Issues - Forest Products Sector

The major issue for the Break O'Day is adjustment to the fall in industry employment in the broader region.

The industry has undergone significant restructuring over the last decade. Hardwood timber derived from plantations will increase, while logging of native forests is declining.

Other value added products are being investigated such as engineered timber products, bioethanol and biochar.[46] Competing land uses such as dairy, meat and agriculture (with increasing returns from these activities) may impact on the plantation sector, following harvesting of existing timber.

The Northern Region Plan report indicates that there is greater recognition that the forestry industry is a renewable industry which can provide sustainable long term benefits. Opportunities identified include: expanded fibre-based processing operations such as a pulp mill, rayon (dissolving pulp) and bioethanol; residue-based processing, such as biomass, biochar, biofuel, wood pellets and briquettes (for export markets); growth in the tissues and other paper product manufacturing sector (toilet paper, kitchen rolls and facial tissues).[47]

The major issue for Break O'Day is adjustment to the changes to the sector and the indirect impacts of the changes in forestry and processing in Dorset LGA. For Break O'Day residents the overall job losses were around 90+ jobs (23 jobs located in BOD and around 70 jobs that these workers travelled to in Dorset LGA). Over a ten year period (2001-2011) jobs in the forest products sector located in Break O'Day declined from 74 to 14.

Key Issues: Forest Products	
Issue	**Direction/Actions**
Adjusting to change	**Break O'Day LGA** **Impacts:** - The area is less dependent on the sector. - However residents have been impacted by the recent industry changes as up to 70 persons were travelling to jobs in Dorset (but lived in Break O'Day). - These changes have affected the LGA: as there has been no jobs growth (male jobs) since 2006; and they have combined with changes in other sectors (eg. a decline in fishing; reduction of visitor numbers; and weaker general business conditions). - There is evidence of workers and their families moving out of the LGA to secure other employment. **Future:** - Direct industry employment is likely to remain at current levels (ie. 14 in forestry and 12 in wood products manufacturing). - Future industry diversification and development will have limited direct impacts on business activity in the LGA. - Some Break O'Day residents may take up any new jobs created in Dorset LGA from other processing activities.

46 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA Regional Economic Development Plan: P150

47 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA Regional Economic Development Plan: P151

4.5 Mining Industry

4.5.1 Overview

Mining and mineral processing are important to the Northern Region and in 2010-2011, contributed $407 million to the Tasmanian economy.[48]

Current mining activity in the Break O'Day Region is undertaken at the Cornwall Coal mines around Fingal and St Marys and the gold mines at Mathinna. Hardrock Coal is developing a new mine near Fingal. There are also several quarry operations in the LGA.

When the Hardrock Coal operations are at their peak, direct mining industry employment will increase from around 70 (at Cornwall Mines) to a total of around 260-280 persons.

4.5.2 Mining Operations

Cornwall Coal

The Cornwall Coal Company is the only current coal miner in Tasmania. It mines black coal from underground and open cut mines near St Marys, from where the product is transported to a washery at Duncan Siding near Fingal (from the Duncan Colliery at Fingal, and from Kimbolton in southeast Tasmania).[49] Production of raw coal in 2010/2011 totalled 540,024 tonnes, with 342,760 tonnes of saleable coal being produced. Cornwall Coal Company is a subsidiary of Cement Australia.[50]

Cornwall employs over 70 people, making it one of the major employers in the Fingal Valley and North East Tasmania and one of the largest employers in Break O'Day LGA.[51] The major consumers of Tasmanian coal are the Cement Australia plant at Railton and the Norske Skog newsprint mill at Boyer.

Hardrock Coal - Fingal Tier Project

Hardrock Coal owns two exploration licences, which cover an area of 278 square kilometres near Fingal. The approved mine operation is centered on a disused underground coalmine (Valley 2 Mine near Fingal), in a 10-square-kilometre area of the Duncan seam, adjacent to the Cornwall Coal Company's Duncan Mine operation. The mining project received approvals from Break O'Day Council and the Tasmanian Government in the second half of 2012.[52]

- Yield: the yield is up to one million tonnes of coal per annum, with a forecast life of about 15 years. This will generate revenues of around $100 million each year.[53]
- Transport: coal will be transported (from a proposed loading facility and rail spur adjacent to the Valley Rd and Esk Highway intersection) directly to a dedicated loading and storage area at Bell Bay Port.
- Construction phase: construction expenditure is expected to be approximately $17 million. The construction component will: create an estimated 78 FTE jobs in the region (53 direct jobs and 25 flow on jobs), and 116 jobs state-wide; and it will generate $4.3 million in household income in the regional economy and $7.6 million state-wide.[54]
- Operations phase employment: direct employment in year 1 is 81 persons; year 2 135 persons; and year 3 207 persons.[55]
- Population in the North East Region would increase by around 100 in year 1 and by almost 300 by the time full production levels are reached in year 3. This estimate is based on mine employees and their families living in the region.

Industry Employment

Total employment in the sector will increase to around 280 when the Hardrock Coal mine reaches full production. This is up from a total of around 70 mining jobs over the last decade. Mining would represent around 15% of jobs in Break O'Day in 2016 when the new mine becomes fully operational.

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48 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA Regional Economic Development Plan: P153

49 http://www.cementaustralia.com.au/wps/wcm/connect/website/cement/home/about-us/

50 Shareholders, Holcim (75%) and Heidelberg Cement subsidiary Hanson (25%).

51 http://www.cementaustralia.com.au/wps/wcm/connect/website/cement/home/about-us/

52 http://www.hardrockcoal.com/about/hardrock-coal-mining. HRCM received Environmental Permit from the Environmental Protection Authority Tasmania on 28 August 2012 and its Development Approval (DA) from the Break O'Day Council on 17 September 2012.

53 HardRock Coal Mining Pty Ltd, Fingal Tier Export Coal Project Outline 2012; Fingal Tier Project Development Proposal and Environmental Management Plan Prepared for: Hardrock Coal Mining Pty Ltd January 2012

54 Economic Impact Assessment of the Fingal Tier Coal Project on the Economies of North East Tasmania and Tasmania, EconSearch Pty Ltd (for GHD) Pvi

55 Economic Impact Assessment of the Fingal Tier Coal Project on the Economies of North East Tasmania and Tasmania, EconSearch Pty Ltd (for GHD) P23

Table 47. Employment by Company - Coal Sector

Mining Businesses	Direct Employment
Cornwall Coal Company	70 FTE (2012-)
Hardrock Coal	Construction : 53 FTE (2013) Operations: 81 FTE (Year 1 = 2014) 135 FTE (Year 2= 2015) 207 FTE (Year 3= 2016)

Source: Company Reports

Table 48. Mining Sector Jobs - Break O'Day LGA 2001-2011

Sector Jobs	2011	2006	2001	Change 2001-2011
Coal mining	57	60	66	-9
Oil and gas extraction	0	0	4	-4
Non-metallic mineral mining and quarrying	6	0	0	6
Exploration and other mining support services	3	0	0	3
Total	**66**	**60**	**70**	-4

Source: ABS Census 2001-2011, Working Population Data

Table 49. Mining Sector Jobs - Break O'Day LGA 2011

Sector Jobs	Males	Females	Persons
Coal mining	53	4	57
Non-metallic mineral mining and quarrying	3	3	6
Exploration and other mining support services	3	0	3
Total	**59**	**7**	**66**

Source: ABS Census 2011, Working Population Data

4.5.3 Key Issues -Mining

The development of the Hardrock Coal project will provide a major boost to full time jobs in the region. Most of these jobs will be held by males, at a time when full time jobs for males have been static overall, and have been declining in some key sectors. A key issue is maximising the local benefits of

The major issue for the region is maximising the local benefits from mining operations in terms of direct employment and business linkages.

Key Issues: Mining	
Issue	**Direction/Actions**
Maximise local benefits	**Local Benefits** - Benefits to Break O'Day will be maximised when employees are (or become) local residents, rather than fly in/ fly out or drive in/drive out workers. - The key benefits comprise an increase in population and the associated demand for services in St Marys, Fingal and other parts of the LGA. - Employment of locals has the potential to stabilise the population in the smaller centres, which have lost people due to the earlier declines in forestry and agriculture jobs.
	- The expansion of mining will provide potential business for contractors, technicians and local engineering businesses in the region.

4.6 Manufacturing Sector

4.6.1 Overview

Manufacturing in the region is primarily: small scale light industrial activity - engineering, machinery and equipment servicing for a regional market; wood products (cabinets); and specialist food production (eg. Pyengana Dairy Company, Eureka Farm and White Sands Estate -wine and Iron House Brewery). Many of the light industrial businesses are located in the St Helens industrial estate.

4.6.2 Industry Employment

Manufacturing jobs represented 6% of jobs (100 jobs) in the LGA in 2011. Major sectors of employment were food products, mineral products, metal products and wood products (saw mill).

Over the period since 2001 there have been changes in employment in the sector, with total sector employment increasing by 32 jobs. This comprises: a growth in jobs in food products, non-metallic mineral products, metal products and machinery and equipment; and declines in wood products, printing, and furniture manufacture. Most of these manufacturing businesses are small and only three had between 5-19 employees in 2009.

Table 50. Manufacturing Sector Jobs - Break O'Day LGA 2011

Jobs Break O'Day LGA 2011			
Manufacturing	**Males**	**Females**	**Persons**
Manufacturing, nfd	4	0	4
Food product manufacturing	15	19	34
Beverage and tobacco product manufacturing	3	0	3
Wood product manufacturing	9	3	12
Polymer product and rubber product manufacturing	3	0	3
Non-metallic mineral product manufacturing	18	0	18
Primary metal and metal product manufacturing	9	3	12
Transport equipment manufacturing	5	0	5
Machinery and equipment manufacturing	6	0	6
Furniture and other manufacturing	3	0	3
Total	**75**	**25**	**100**

Source: ABS Census 2011, Working Population Data

Table 51. Manufacturing Sector Jobs - Break O'Day LGA 2001-2011

Jobs Break O'Day LGA 2011				Change
Manufacturing	**2011**	**2006**	**2001**	**2001-2011**
Manufacturing, nfd	4	0	0	4
Food product manufacturing	34	30	22	12
Beverage and tobacco product manufacturing	3	3	0	3
Textile, leather, clothing and footwear manufacturing	0	0	0	0
Wood product manufacturing	12	17	20	-8
Printing	0	0	6	-6
Petroleum and coal product manufacturing	0	0	3	-3
Polymer product and rubber product manufacturing	3	0	0	3
Non-metallic mineral product manufacturing	18	11	3	15
Primary metal and metal product manufacturing	12	3	5	7
Transport equipment manufacturing	5	11	0	5
Machinery and equipment manufacturing	6	8	0	6
Furniture and other manufacturing	3	7	9	-6
Total	**100**	**90**	**68**	**32**

Source: ABS Census 2001-2011, Working Population Data

4.6.3 Key Issues - Manufacturing

The major issue for the industry is sustaining activity in the region, through market growth and developing value added activities in agribusiness.

Break O'Day is not a location for the development of large scale manufacturing operations. It has a base of light industrial activities, which are typical of a small regional centre. There are also several gourmet food and beverage operations (Pyengana Dairy Company; White Sands Estate and Iron House Brewery; and Eureka Farm).

Future opportunities are focused in two areas: development of food and beverage production; and maintenance and growth of light industrial activities. Growth in light industry requires a growth in the regional population and the servicing of broader markets.

Key support issues relate to the provision of industrial land and the development of workforce skills.

Key Issues: Manufacturing	
Issue	**Direction/Actions**
Developing the food and beverage sector	**Food and Beverage** Specialised food production has experienced growth in the region, based on the quality of local produce and a reputation for gourmet products (eg. Pyengana Dairy Company). This sector is also linked to the visitor market and the potential for the development of a food trail. Potential has been identified for the development of cool climate wines and White Sands Estate is involved in large scale planting of vines.
Ensuring growth in light industrial activity	**Light Industry** Other segments of manufacturing are reliant on the size of the regional market. For consumer related products, the size of the population (Break O'Day and adjacent LGAs) is the major driver. For industry servicing the business market (eg. mining, agribusiness, fishing, food processing and forestry), the scale of regional operations is the key driver of demand. For example, growth in mining activity can provide some opportunities for engineering businesses in construction, servicing and maintenance.
Developing local skills	**Skills** Workforce recruitment, retention and the development of skills is an issue for the region. This covers the development of a skilled local workforce and key directions are: • Development of industry workforce strategies that cover the broader Northern Region. • Use of the Trade Training Centre (St Helens) facilities for skills development (schools based apprenticeships, and workforce training programs). • Development of an agribusiness skills strategy, including development of food processing skills.

4.7 Construction Sector

4.7.1 Overview

The construction sector is mainly servicing a regional housing market (new houses, renovations and maintenance). Demand is affected by population size and growth and by the level of new housing development in the region.

4.7.2 Construction Sector Jobs

Construction jobs (94) represented 6% of jobs in the LGA in 2011. Major areas of employment were building (41 persons) and construction services (49 persons), which covers electricians, plumbers and other trades; and other building professionals.

The number of jobs in the sector was fairly constant between 2006 and 2011, which indicates relatively stable levels of building and construction activity in the area.[56] Many of the construction businesses in the area are sole traders; 39 had 1-4 employees; and only 3 had between 5-19 employees.

56 The presence of Heavy and civil engineering construction jobs in 2001, reflects major civil works being undertaken in that year.

ABS data shows that there were a total of 157 persons employed in the construction sector resident in Break O'Day. This indicates that tradespersons travel to projects and jobs outside of the LGA.

Table 52. Construction Sector Jobs - Break O'Day LGA 2011

Break O'Day LGA 2011			
Construction	**Males**	**Females**	**Persons**
Construction (not defined	0	0	0
Building construction	38	3	41
Heavy and civil engineering construction	4	0	4
Construction services	39	10	49
Total	**81**	**13**	**94**

Source: ABS Census 2011, Working Population Data

Table 53. Construction Sector Jobs- Break O'Day LGA 2001-2011

Jobs Break O'Day LGA 2011	Persons			Change
Construction	**2011**	**2006**	**2001**	**2001-2011**
Construction (not defined)	0	3	3	-3
Building construction	41	34	25	16
Heavy and civil engineering construction[57]	4	5	32	-28
Construction services	49	48	0	49
Total	**94**	**90**	**60**	**34**

Source: ABS Census 2001-2011, Working Population Data

4.7.3 Key Issues - Construction

Future activity and employment will be mainly dependent on population growth and housing development in the region and any other construction projects.

Construction businesses are mainly servicing a local and regional market. Activity and employment levels are driven by the level of construction occurring in the market. The main driver of the sector is population growth and housing demand in the region.

Workforce issues are significant in the sector, particularly skills development. Break O'Day needs to link to broader workforce development programs for the Northern Region.

Key Issues: Construction	
Issue	**Direction/Actions**
Growth and future jobs	**Growth** The number of businesses and jobs in the area will be driven by several factors: - Population growth and housing requirements in Break O'Day. - Population growth and housing requirements in the broader Northern Region. - The extent of non-housing development and construction that occurs in the area (commercial, health, age care, government etc.).
Developing workforce skills	**Skills** A broader regional issue is the future development of the workforce and trade skills. - This relates to young people entering the construction trades and securing training. - Businesses in the sector need to be linked to regional training initiatives for building and construction trades. - The Trade Training Centre (St Helens) can be utilised for schools based programs, community based programs and for retraining programs for the sector. - Break O'Day Council should establish links with TasTAFE in relation the Trade Training Centre.

57 The presence of Heavy and civil engineering construction jobs in 2001, reflects major civil works being undertaken in that year.

4.8 Tourism Industry

4.8.1 Overview

Tourism is an important sector for Break O'Day and is one of the major drivers of activity in the regional economy.

Visitors account for an estimated annual spending of $39 million in Break O'Day LGA; around 20% of businesses in the area are dependent on the sector; and it supports around 213 local jobs (13% of jobs in the LGA). Tourism revenues are around 2.5 times the value of farm gate revenues from agriculture ($14.5 million).
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Break O'Day and the East Coast have been affected by the overall decline in domestic tourism and visitor numbers to Tasmania. St Helens has experienced a decline in visitor numbers (overnight and day visitors), particularly over the last 3 years. There are several factors explaining these trends: the national decline in domestic holidays and an increase in international travel (with a high $Aud and discount airfares); the impacts of the GFC since 2008 (increased savings and reductions in spending); Tasmania attracts an older demographic-couples 55+, who would have been impacted by the GFC (eg. self-funded retirees); and competition for visitors with other areas of Tasmania. The growth in short breaks (week-ends etc.) has favoured more accessible regional cities and capital cities.

Visitor data is available for St Helens. Using St Helens as the main centre of Break O'Day, the region has experienced a number of recent trends.

- Overall interstate overnight visitor number declined by 20,600 or 20% in the period 2008-2012. This reflected major declines in visitors from Victoria (10,600 or 27%); from New South Wales (7400 or 24%) and declines in visitors from all other States except Western Australia.
- There was a fall in the numbers travelling via the TT Line (down 9600 or 22%).
- In addition to a decline in overnight visitors, there has been a decline in the number of persons, who are passing through and those visiting but not staying overnight.

A major focus is required on developing the market to increase visitor numbers, return visits and length of stay. This requires a regional approach to developing: product; infrastructure and services; and the regional market. Recent initiatives are heading in this direction: the Break O'Day Tourism Strategy; the Eastern Regional Tourism Organisation; and the Break O'Day Chamber creating a tourism sub-group.

A broader analysis of tourism in the Northern Tasmania Region was undertaken as part of the Department of Economic Development, Tourism and the Arts (DEDTA) *Regional Economic Development Plan: Northern Tasmania*.[58] In the 12 months ending March 2012, the Northern Region (which includes Launceston) attracted 372,700 interstate and international visitors, who spent one or more nights in the region. These visitors stayed for a total of 1.44 million nights. The region also attracted 380,000 Tasmanian visitors who stayed overnight. The mix for overnight visitors comprises: holiday visitors (61%); visiting friends and relatives (21%), business conferences or employment reasons (13%); and for other purposes (5%).[59] Launceston is a major gateway to the Northern Region, including the East Coast Region.

4.8.2 Industry Structure

The tourism sector covers a range of activities including accommodation, hotels, cafes and restaurants, food retail, charter boat operations, and local food and wine producers.

Expenditure

Estimates were developed for Break O'Day LGA and indicate that: total tourist spending was $39 million in 2011/12; intra-state overnight visitors accounted for spending of $20 million (55%); inter-state overnight visitors for $16 million (45%); and international overnight visitors accounted for around $2.5 million in spending. Day visitors accounted for a total of $1.4 million in spending in 2011/12 (based on average spending of $48 per person).[60]

58 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P156
59 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P156
60 MCa estimates December 2012

Table 54. Estimated Expenditure Overnight Visitors - Break O'Day LGA 2011/12

Tourist Spending	Total Expenditure	Share of expend.	Visitors	Visitor nights	Expenditure per visitor	Expenditure per night
Visitors	$million		'000	'000	$	$
Intra-state- (Tasmanian Residents)	20.0	54.9	69.2	197.2	289	101.4
Inter-state - Residents (all other states)	16.4	45.1	46.4	129.6	353	126.5
Total Domestic Visitors	**36.4**	100.0	**115.6**	**326.8**	**315**	**111.4**
International Visitors	2.5		10.0	21.0	**252**	**120.0**

Source: Regional Tourism Profile for East Coast 2011/12, Tourism Research Australia and MCa estimates.

Table 55. Estimated Expenditure Day Visitors - Break O'Day LGA 2011/12

Day Visitors Spending						
Visitors	July 2008 - June 2009	July 2009 - June 2010	July 2010 - June 2011	July 2011 - June 2012	Change 2009-2012 No	Change 2009-2012 %
St Helens (visited - stop/looked around) (No)	35,100	29,200	26,800	28,700	-6400	-18.23
Ave spend (per person)	48	48	48	48	0	0.00
Total Spending ($ million)	**1.685**	**1.402**	**1.286**	**1.378**	-0.307	-18.2

Source: Regional Tourism Profile for East Coast 2011/12, Tourism Research Australia and MCa Estimates

The following table provides estimates of expenditure by category for overnight visitors.

- The major categories were: accommodation $12.7 million ($7 million intra-state and $5.7 million inter-state); food and drink $15.0 million ($8.3million intra-state and $6.8 million inter-state); and fuel $5.1 million ($2.8 million intra-state and $2.3 million inter-state).
- Average spending per visitor per day was $101 for intra-state visitors and $126 for inter-state visitors.

Table 56. Estimated Spending by Category - Break O'Day LGA 2011/12

Break O'Day LGA		$ million	$ million	$ million	Intra-state-Tas Residents	Inter-state-Residents	Total	Intra-state-Tas Residents	Inter-state-Residents	Total
Expenditure	Shares %	Intra-state-Tas Residents	Inter-state-Residents	Total	Spending per visitor/visit $	Spending per visitor/visit $	Spending per visitor/visit $	Spending per visitor /day	Spending per visitor /day	Spending per visitor /day
Total Tourist Spending		**20.0**	**16.4**	**36.4**	**288.9**	**353.3**	**314.9**	**101.4**	**126.5**	**111.4**
Accommodation	0.35	7.0	5.7	12.7	100.5	122.9	109.5	35.3	44.0	38.7
Food and drink	0.41	8.3	6.8	15.0	119.4	146.0	130.1	41.9	52.3	46.0
Airfares	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other transport fares	0.03	0.7	0.5	1.2	9.4	11.5	10.3	3.3	4.1	3.6
Fuel	0.14	2.8	2.3	5.1	40.8	49.9	44.5	14.3	17.9	15.7
Shopping	0.03	0.7	0.5	1.2	9.4	11.5	10.3	3.3	4.1	3.6
Entertainment	0.02	0.4	0.4	0.8	6.3	7.7	6.8	2.2	2.8	2.4
Other	0.01	0.2	0.2	0.4	3.1	3.8	3.4	1.1	1.4	1.2
Package Tours	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Regional Tourism Profile for East Coast 2011/12, Tourism Research Australia and MCa Estimates

Accommodation

Accommodation in the region comprises: hotels, motels and serviced apartments; caravan and holiday parks; bed & breakfasts; and holiday house rentals. ABS survey data shows that in 2010 the commercial accommodation sector in Break O'Day comprised: 11 hotels, motels, serviced apartments (with 6 motels/resorts/serviced apartments with more than 15 rooms); and 3 major caravan/holiday parks.[61]

61 ABS Tourist Accommodation Establishments - at 30 June – Tasmania, 2011

Table 57. Break O'Day LGA Tourist Accommodation Establishments 2007-2010

Tourist Accommodation Establishments - at 30 June (number)	2007	2008	2009	2010
Hotels, Motels, Serviced Apartments - 5 to 14 rooms	7	7	7	5
Hotels, Motels, Serviced Apartments - 15 or more rooms	6	6	6	6
Hotels, Motels, Serviced Apartments - Total - 5 or more rooms	**13**	**13**	**13**	**11**
Hotels - 15 or more rooms	3	3	3	3
Serviced Apartments - 15 or more rooms	3	3	3	3
Caravan Parks	3	3	3	3
Holiday Flats & Units	1	1	2	1

Source: ABS Tourist Accommodation Establishments - at 30 June, Tasmania 2011

The broader East Coast Region had a total of 17 motels and serviced apartments with 15 or more rooms. Takings for accommodation in this broader region were $8.7 million in the March to June period of 2012. This aligns with other estimates that show annual expenditure on accommodation by domestic overnight visitors in the East Coast at around $32 million.[62]

Businesses and Employment

The following are estimates of the number of tourism related businesses located in Break O'Day LGA. Of the 330 businesses around 70 or 21% could be classified as tourism related businesses. These businesses rely on tourism activity and visitors for a significant part of their annual revenues.

Table 58. Tourism Businesses - Break O'Day LGA 2009

Break O'Day LGA Sectors	Total Businesses	Tourism Share of Businesses %	Estimated Tourism Businesses
Agriculture	132	7.0	9
Manufacturing (includes food and beverage manufacture)	24	30.0	7
Retail	63	25.0	16
Accommodation		95.0	11
Food and beverage services	39	70.0	17
Transport	33	8.0	3
Arts and Recreation	6	50.0	3
Personal Services	24	15.0	5
Total Businesses in these Sectors	**330**		**70**
Tourism Businesses Share of Total Businesses in Region			**21%**

Source: ABS Business Data 2009 and MCa estimates

The following table shows that an estimated 213 persons or 13% of employees in Break O'Day LGA were employed in tourism-related activities.

Table 59. Tourism Jobs by Sector - Break O'Day LGA 2011

Break O'Day LGA Sectors	Total Employment Males	Females	Persons	Estimated Tourism Share of Jobs %	Estimated Tourism Employment
Agriculture	131	46	177	6	11
Manufacturing	75	25	100	8	8
Retail	84	141	225	12	27
Accommodation	47	73	120	95	114
Food and beverage services	30	48	78	40	31
Transport	49	6	55	8	4
Arts and Recreation	12	6	18	40	7
Personal Services	18	18	36	15	6
Total Jobs in these Sectors	**489**	**493**	**982**		**213**
Tourism Jobs as a share of Total Jobs in these Sectors					**22%**
Total Jobs in the LGA			**1682**		
Tourism Jobs as a Share of Total Jobs in the LGA					**13%**

Source: ABS Census 2011 Working Population data and MCa estimates.

The number of jobs in the accommodation sector increased between 2001 and 2006 and then declined between 2006 and 2011. This reflects trends in visitor numbers to the area. Food and beverage services employment increased over the whole period. It should be noted that most of the food and beverage businesses have locals as their principal markets, but the tourist seasons are important for overall annual revenues and profitability.

62 Regional Tourism Profile for East Coast 2011/12, Tourism Research Australia

Table 60. Accommodation and Food Services Sectors Jobs - Break O'Day LGA 2001- 2011

Employment 2001-2011				
Accommodation and Food Services	2011	2006	2001	Change 2001-2011
Accommodation	120	135	90	30
Food and beverage services	78	79	60	18
Total	**198**	**214**	**150**	**48**

Source: ABS Census 2011 Working Population data and MCa estimates.

Table 61. Accommodation and Food Services Sector Jobs - Break O'Day LGA 2011

Employment 2011	Males	Females	Persons
Accommodation and Food Services			
Accommodation	47	73	120
Food and beverage services	30	48	78
Total	**77**	**121**	**198**

Source: ABS Census 2011 Working Population data and MCa estimates.

4.8.3 Tourism Market Trends

East Coast Tourism

There are several trends in relation to visitors to the East Coast Region as tracked by the Tasmanian Visitors Survey (TVS) 2012.

- Around two thirds of interstate visitors were from Victoria (34%) and New South Wales (29%) in 20011/12.
- There has been a decline in overnight interstate visitors in the 2008-2012 period - a fall in annual visitor numbers by 33,100 or 14%. Over the most recent period 2011-2012, visitor numbers continued to decline.
- This trend has occurred in all of the major locations, including St. Helens.
- Most of the visitors to the East Coast arrive via Hobart airport (47% or 113,000 in 2011/12); Launceston Airport (27% or 65,300); or via Devonport and the TT Line (24% or 58,700).
- Reflecting the decline in overall visitor numbers, the traffic through the airports and TT Line declined over the period 2008-2012.[63]

There are several factors explaining these trends: the national decline in domestic holidays and an increase in international travel (with a high $Aud and discount airfares); the impacts a weaker economy since 2008 (with an increased savings and reductions in expenditure-particularly for couples 55+/self-funded retirees); and a shift to short breaks in accessible regional cities.

Area Trends

The following compares data for St Helens and other areas on the East Coast. It shows three categories of inter-state visitors: passed through; stopped and looked around; and stayed overnight.

- St Helens has experienced a fall in all of the visitor categories. A similar pattern is evident for all other areas except Orford, which had a significant increase in the number of overnight visitors and visitor nights.
- A major issue for the tourism sector has been the fall in the number of visitors and visitor nights since 2008-09 - a fall of 26% in nights from 164,100 to 121,900. The major part of the fall occurred in the 12 months to mid-2012.
- Overall the East Coast has experienced a decline in visitor numbers of 67,600 over the period, with St Helens accounting for the major part of this fall in visitor nights (a fall of 42,000 from 164,100-19% to 121,900 nights in the period 2008-2012). Falls also occurred in Bicheno, Swansea, and the only growth was Orford (an increase of 17,700 to 30,800 nights in 2012).
- Over the period the average number of nights in St Helens declined from 2.3 to 1.9 nights. The number of nights at the other locations on the East Coast was stable, with Orford increasing to 3.6 days.

63 Tasmanian Visitors Survey (TVS) - Tourism Tasmania 2012

Table 62. Visitor Numbers - East Coast Locations 2008-2012

Area Comparisons Total visitors 14+ Interstate Visitors Persons	July 2008 - June 2009	July 2009 - June 2010	July 2010 - June 2011	July 2011 - June 2012	2010/11- to 2011/12 % Change	change 08/9-10/12 No	%
St Helens							
St Helens (Passed through)	35100	29200	26800	28700	7.2	-6400	-18.2
St Helens (visited - stop/looked around)	55200	55600	54600	46700	-14.5	-8500	-15.4
St Helens (stayed overnight)	71500	75100	71200	62600	-12.1	-8900	-12.4
Total visitors 14+	**161800**	**159900**	**152600**	**138000**	**-9.6**	**-23800**	**-14.7**
St Helens (number of nights)	164100	146700	150200	121900	-18.8	-42200	-25.7
St Helens (ave. number nights)	2.3	2.0	2.1	1.9		-0.3	
Total East Coast							
Total East Coast (Passed through)	19000	15100	17300	14300	-17.5	-4700	-24.7
Total East Coast (Visited)	44100	49400	48100	42500	-11.6	-1600	-3.6
Total East Coast (Overnight)	229800	226700	222400	196700	-11.5	-33100	-14.4
Total visitors 14+	**292900**	**291200**	**287800**	**253500**	**-11.9**	**-39400**	**-13.5**
Total East Coast (number of nights)	606500	568200	590600	538900	-8.8	-67600	-11.1
Total East Coast (ave. number nights)	2.6	2.5	2.7	2.7			
East Coast Areas							
Bicheno							
Bicheno (Passed through)	47900	42400	44000	38300	-12.9	-9600	-20.0
Bicheno (Visited)	66800	66100	66300	60200	-9.2	-6600	-9.9
Bicheno (Overnight)	66400	62600	64100	55500	-13.5	-10900	-16.4
Total visitors 14+	**181100**	**171100**	**174400**	**154000**	**-11.7**	**-27100**	**-15.0**
Bicheno(number of nights)	117000	106100	101700	99500	-2.2	-17500	**-15.0**
Bicheno (ave. number nights)	1.8	1.7	1.6	1.8			
Coles Bay							
Coles Bay (Passed through)	35000	27700	27300	24100	-11.6	-10900	-31.1
Coles Bay (Visited)	72500	71900	72300	70200	-3	-2300	-3.2
Coles Bay (Overnight)	59000	60100	59600	53200	-10.7	-5800	-9.8
Total visitors 14+	**166500**	**159700**	**159200**	**147500**	**-7.3**	**-19000**	**-11.4**
Coles Bay(number of nights)	114300	111900	121800	114000	-6.4	-300	**-0.3**
Coles Bay (ave. number nights)	1.9	1.9	2.0	2.1			
Swansea							
Swansea (Passed through)	74900	63300	66000	57500	-12.9	-17400	-23.2
Swansea (Visited)	61400	69100	63700	60500	-5	-900	-1.5
Swansea (Overnight)	57300	53800	54500	43200	-20.6	-14100	-24.6
Total visitors 14+	**193600**	**186200**	**184200**	**161200**	**-12.5**	**-32400**	**-16.7**
Swansea(number of nights)	85100	84900	90500	69300	-23.4	-15800	-18.6
Swansea (ave. number nights)	1.5	1.6	1.7	1.6			
Orford							
Orford (Passed through)	86200	67900	75700	60200	-20.5	-26000	-30.2
Orford (Visited)	30400	30900	25500	27200	6.5	-3200	-10.5
Orford (Overnight)	7800	13300	8800	9600	8.6	1800	23.1
Total visitors 14+	**124400**	**112100**	**110000**	**97000**	**-11.8**	**-27400**	**-22.0**
Orford(number of nights)	13100	22000	19100	30800	61.5	17700	135.1
Orford(ave. number nights)	1.7	1.7	2.2	3.2			

Source: Tasmanian Visitors Survey (TVS) - Tourism Tasmania 2012.

Break O'Day LGA

Visitor data is available for St Helens. Using St Helens as the main centre for tourism for Break O'Day, the region has experienced a number of trends:

- Overall interstate overnight visitor numbers declined by 20,600 or 20% in the period 2008-2012. This reflected major declines in visitors from Victoria (10,600 or 27%); New South Wales (7400 or 24%); and declines in visitors from all other states, except Western Australia.
- There was a major fall in the numbers travelling via TT Line (down 9600 or 22%).
- In addition to a decline in overnight visitors, there has been a fall in the number of persons, who are passing through and those visiting but not staying overnight.

Table 63. Overnight Visitors - St Helens 2008-2011

Total Visitors Aged 14 Years and Over: St Helens (Visited/Stayed O/night Interstate)	July 2008 - June 2009	July 2009 - June 2010	July 2010 - June 2011	July 2011 - June 2012	2010/11- to 2011/12 % Change		Share Year 2011/12	Year 2009/10	Year 2008/9	Change 08/09-11/12 No	%
Residence											
Victoria	38,900	38,600	34,700	28,300	-18.4	▼	33.6	36.3	37.1	-10,600	-27.2
New South Wales	31,000	27,000	25,000	23,600	-5.5	▼	28.0	25.4	29.6	-7,400	-23.9
Queensland	19,300	20,000	24,500	16,800	-31.5	▼	20.0	18.8	18.4	-2,500	-13.0
South Australia	6,200	10,800	5,900	4,800	-17.7	▼	5.7	10.2	5.9	-1,400	-22.6
Western Australia	5,600	7,400	8,600	8,600	0.7	▲	10.2	7.0	5.3	3,000	53.6
ACT	2,700	1,800	2,200	1,400	-33.5	▼	1.7	1.7	2.6	-1,300	-48.1
NT.	1,100	600	800	700	-15	▼	0.8	0.6	1.0	-400	-36.4
Australia – no State given	300	200	700	700	-9.4	▼	0.8	0.2	0.3	400	133.3
Total Interstate Visitors	**104,800**	**106,200**	**101,700**	**84,200**	**-17.0**	▼	**100.0**	**100.0**	**100.0**	**-20,600**	**-19.7**

Source: Tasmanian Visitors Survey (TVS) – Tourism Tasmania 2012.

4.8.4 Key Issues - Tourism

Tourism is critical to the future of the region. The population of Break O'Day more than doubles during the peak holiday season (December/January). A major issue for the future is developing the tourism market- maintaining and increasing visitor numbers and increasing the number of overnight stays. This requires improvements in tourism infrastructure and tourism product and active marketing of Break O'Day as a destination on the East Coast.

Market Characteristics

The Northern Region Development Plan highlights a number of issues affecting regional tourism. [64]

- Tasmania relies on the domestic market and the relative low costs of international travel have impacted on domestic holiday travel. Tasmania is also not a cheap destination, with the combined cost of airfares, hire car, accommodation meals and activities.
- Air access is a major issue with fluctuations in capacity on routes (including Launceston) impacting on prices and seat availability.
- Travel patterns have shifted to short stays/breaks, which benefit accessible regional cities but also impact on the dispersal to other towns and locations, within a region (particularly for overnight stays).
- There are ongoing workforce issues in terms of recruitment and training of employees in a sector, which is characterised by relative high labour turnover rates.
- Other issues include seasonality of tourism and the impacts of penalty rates on the "viability" of opening on public holidays and Sundays.

These factors all affect the viability and sustainability of regional tourism businesses, which in most cases have to generate most of their turnover and profitability *"during the peak and shoulder tourism periods to carry their business through the off-peak season and ensure their year-round sustainability."*[65] Improvement of tourism product is seen as a major issue, with around 65% of visitors having been to Tasmania before and therefore looking for new experiences.

"The lack of a signature iconic experience or product with broad appeal in Northern Tasmania is a major impediment to the region attracting both a larger share of visitors to the state and stimulating further investment in tourism product."

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P158

64 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P157
65 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P157

Recent initiatives that are directed at strengthening the sector have been:

- Development of a long-term, Break O'Day Tourism Strategy.[66] Key priorities in the strategy are destination management, destination development and destination marketing.
- Formation of *East Coast Regional Tourism Organisation (RTO),* with Council and industry representation. It covers the two LGAs of Glamorgan-Spring Bay and Break O'Day.[67] The East Coast Regional Tourism Organisation (ECRTO) is the peak tourism industry Body in the municipalities of Glamorgan/Spring Bay and Break O'Day. It works with tourism interests in the region to coordinate destination marketing and provide support to operators. The RTO was formed after a major review of regional tourism organisations by Ernst & Young.
- Break O'Day Chamber of Commerce - formation of a tourism sub-group, based on recognition of: the importance of tourism to the region; and a need for an active approach to developing the sector.

The Bay of Fires, Freycinet Coast and Maria Island region comprises a 220 kilometre coastal strip from Buckland in the south to Bay of Fires in the north, taking in Maria Island, the Freycinet Peninsula and Wineglass Bay and Bicheno.

Bay of Fires, Freycinet Coast, Maria Island - East Coast Tasmania (ECRTO Region)

Source: http://eastcoasttourism.com.au/ (East Coast Regional Tourism Organisation Region)

4.8.5 Tourism Strategy

Some key issues and directions for the tourism sector are related to infrastructure, products and market development. Break O'Day will benefit from a broader regional approach to tourism (eg. attracting visitors to the East Coast Region, with Break O'Day being a short break/overnight destination on the East Coast).

- Major opportunities identified include: a strategic approach to market development through the recently established industry-led East Coast Regional Tourism Organisation**.**
- Building on relationships with Virgin, Jetstar and Tiger and developing more flights through Launceston; developing food and wine tourism experiences in the region; greater showcasing of regional produce in restaurants; leverage of low season events; and development of niche markets including mountain biking and golf (eg. Barnbougle Dunes and Barnbougle Lost Farm (at Bridport).[68]
- Other development issues include: development of experience and accommodation products at the Bay of Fires (to build on the recognition of the Bay).[69]
- Mountain Biking - three trail development projects have been identified in Northern Tasmania.[70] The proposed trails are at Hollybank/Mt Arthur, Cascade Forest - Dorset and Blue Tier - Dorset.[71]

66 Break O'Day Tourism Development Strategy 2012–2017, Break O'Day Council 2012

67 It is part of an overall restructure of RTOs, with four covering: East Coast, Northern, North West/West Coast and Southern. http://www.tourismtasmania.com.au/regional/east

68 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P158

69 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P159

70 Potential for Mountain Biking in North Eastern Tasmania - Market Demand and Economic Assessment TRC March 2013 P11

- Workforce and skills are seen as a major issue with a need for industry links to schools and training providers and development of industry based training to develop skills and service quality.

Key Issues: Tourism	
Issue	**Direction/Actions**
Visitors	**Building the Market** -A need to turn around the decline in visitor numbers to the region. -A need to capture more overnight visitor nights for persons travelling the coastal trails. -Increasing visitor numbers in the off-season periods.
Market Segments	**Developing Specialist Markets** -Developing other market segments (eg.conferences, diving). -Improving market information targeting market segments.
	Developing Product - Developing other events for the region. - Linking the coastal experience and activities - in food trails, cycling, walking trails, diving trails (and diving wreck), golf trails, fishing experience etc.
	- Acquire diving wreck (HMAS Tobruk) for the region and develop a regional diving trail. Business case to be examined.
Tourism Infrastructure	**Improving Infrastructure** - Addressing gaps in tourist infrastructure and services in the region including: accommodation options; cafes and restaurants; port area; other facilities and attractions. -Improving signage in the region.
Town Centres	**Town Centres** St Helens -improvements to make St Helens more attractive for visitors: waterfront area/boardwalk; access to marina and port area; café options on the water; bike track access. - Improvements in St Marys to encourage stops and stays.
Industry Skills	**Work with tourism sector on workforce skills training.** Link to the *Tasmanian Hospitality Skills Program*. Digital skills – develop operators through a *Digital Ready Program* targeted to regional tourist operators.

4.9 Retail Sector

4.9.1 Overview

Retail is one of the major sectors of employment in the LGA. The sector is driven by the size of the local market (population size and growth) and competition from other retailers (eg. major retailers in Launceston/Hobart and the growth of online shopping). As a tourist area, retail sales is also dependent on activity during the peak holiday periods (eg. the number of overnight visitors and day visitors).

The main retail precinct is in St Helens, with smaller clusters of retail in the other towns and villages. St Helens also services a broader East Coast market.

St Helens generally offers the normal retail mix for a town its size (eg. supermarkets, bakery, food stores, giftware, homewares clothing, hardware, newsagent, sports store etc.) As a coastal tourist location, it has other retailers, including fishing supplies and surf gear. This is combined in the town centre with cafes, restaurants and takeaway food (included in food service sector) and services for the community and businesses (eg. finance, legal, accounting services and other professional services).

4.9.2 Retail Sector Jobs

Total retail jobs 225, represent 13% of jobs in the LGA. The major areas of employment were in food retailing (103) and in other store-based retailing (99).[72] Females make up around two thirds of employees and many of these jobs are part time. There is a major increase in casual employment during the peak tourist season - December/January and Easter period. Overall total employment has been relatively stable over the period, with a decline in jobs in food retailing and motor vehicles being offset by growth in other specialty shops.

71 Forestry Tasmania's will remain the land managers of all the proposed sites. The local councils will be responsible for funding the maintenance of the trails for five years post construction of the trails. This will ensure the quality of the trails is maintained. The three Councils of Launceston, Dorset and Break O'Day are likely to form an agreement to maintain the trails through shared resources. This will increase efficiency of the maintenance program. Potential for Mountain Biking in North Eastern Tasmania - Market Demand and Economic Assessment TRC March 2013 P27

72 Note the ABS Census is conducted in June , every 5 years. These jobs figures do not include casual jobs that are created during the summer peak holiday season.

Of the 63 retail businesses in the region, most of the retail businesses are single owner operated (36); have 1-4 employees (12); 5-19 employees (12); or 50+ employees (3). The latter group are supermarkets and liquor stores.

Table 64. Retail Sector Jobs - Break O'Day LGA 2011

Break O'Day LGA 2011			
Retail	**Males**	**Females**	**Persons**
Retail trade (not defined)	3	3	6
Motor vehicle and motor vehicle parts retailing	3	3	6
Fuel retailing	6	5	11
Food retailing	37	66	103
Other store-based retailing	35	64	99
Total	**84**	**141**	**225**

Source: ABS Census 2011, Working Population Data

Table 65. Retail Sector - Jobs Break O'Day LGA 2001-2011

Jobs Break O'Day LGA 2011	Persons			Change
Retail	**2011**	**2006**	**2001**	**2001-2011**
Retail trade (not defined)	6	10	3	3
Motor vehicle and motor vehicle parts retailing	6	0	29	-23
Fuel retailing	11	14	0	11
Food retailing	103	97	124	-21
Other store-based retailing	99	91	71	28
Total	**225**	**212**	**227**	-2

Source: ABS Census 2001-2011, Working Population Data

4.9.3 Key Issues - Retail Sector

Retail activity is demand driven and influenced by population size, age structure and income levels. Tourism has major impacts on retail revenues during the peak visitor periods, and sustains a significant number of businesses in the main centre – St Helens.

Major factors affecting the retail sector are: population structure and population growth; regional employment levels; regional income levels; visitor numbers; and competition from major centres.

St Helens is the major retail centre for Break O'Day and for other locations on the East Coast. The overall level of retail spending is also affected by the attractiveness of a centre and the mix of retail that is available.

Key Issues: Retail	
Issue	**Direction/Actions**
Population	**Population** - Population size and structure and future growth will be important in maintaining a mixed and sustainable local retail sector. -The contraction in local jobs has affected the population, with some families leaving the area for employment and education reasons. -Relative to major centres in Tasmania, Break O'Day has a significant number of lower income households. -The area also has a significant number of retirees who are in receipt of age pensions. **Future Growth** -Longer term projections are for continued growth in population, particularly in the coastal areas and in St Helens. -Returning to a growth trajectory is important in maintaining retail and generating some growth in the sector.
State of the economy	**Economic Conditions** -The economic slowdown has impacted on the level of retail expenditure. There has been a shakeout in businesses that may have been marginal and this is reflected in an increased number of vacant shops. - Businesses under pressure are those that rely on discretionary spending (eg. gift stores). -Local retailers are facing pressure from retailers in major centres (eg. for clothing, gifts, electronics, hardware etc.) with persons travelling to Launceston or Hobart to access department stores and bulky goods (eg. for white goods and consumer electronics). -Change in the traditional industry sectors has led to a decline in jobs (forest products, agriculture, and fishing) in the region (with some people leaving the region). - Retail is also under-pressure from online purchases.
Servicing the visitor market	**Tourism** -As a tourist area an important part of retail sales driven by visitors. This is particularly the case for St Helens but retail in other centres is also affected by visitor numbers. -The decline in visitor numbers over the last 3 years has impacted on retailers. -Retailers will benefit from tourism initiatives and marketing which leads to an increase in visitor numbers (both overnight stays and day visitors). -Implementation of the new regional tourism strategy is important for retailers.
Planning retail precinct	**Place is Important** -Better planning of town centres can have a positive impact on retail activity and on the retail mix. -An attractive retail precinct with other services available (eg cafes, other services) can encourage visits and stopovers (by residents, holiday visitors and regional visitors). -The mix of retail and pricing is important if local operators are to continue to attract local resident spending and to capture residents from the broader region. -Town centre improvements will be important for the retail sector in St Helens and St Marys. -It is important that retail issues are taken into account in the planning of St Helens to ensure that changes can under-pin the development of a vibrant and sustainable retail sector.

4.10 Business Services Sector

4.10.1 Overview

Business services businesses are covering local and regional markets. Demand is driven by population size and by the number of businesses in the area. The total number of business services jobs in the LGA have remained fairly constant (around 100 jobs) over the last 10 years.

Within a regional area, business services are usually provided by local professional service firms (due to accessibility and preference for local suppliers). In the case of Break O'Day the market is large enough to generally support only two or three suppliers in each category (eg. legal services, accounting, financial services, other business services etc.). Some of these service businesses also operate in a broader Northern Region market. As a coastal holiday area, there is a significant real estate sector (residential sales and holiday rentals). However population and the size of businesses in the region are not of the scale to support large professional services firms. The larger firms tend to be located in the major centres (eg. Launceston and Hobart), with businesses located in Break O'Day mainly being small and located in St Helens.

4.10.2 Business Sector Jobs

The major sectors were: real estate and property services (32 jobs); professional and technical services (37); and financial services (22). Most of these jobs are located in the major coastal centre - St Helens. These business services jobs represented 6% of jobs in the region in 2011. Generally the total number of jobs in business services has been fairly stable over the 10 years to 2011. A decline in media services (publishing and printing) jobs has been offset by some growth in financial services and in real estate jobs.

Table 66. Business Services Sector Jobs - Break O'Day LGA 2011

Break O'Day LGA 2011			
Business Services	**Males**	**Females**	**Persons**
Financial and insurance services			
Finance (incl. banks and advisory services)	3	16	19
Auxiliary finance and insurance services	0	3	3
Total	**3**	**19**	**22**
Rental, hiring and real estate services			
Rental, hiring and real estate services, nfd	0	0	0
Rental and hiring services (except real estate)	3	3	6
Property operators and real estate services	9	17	26
Total	**12**	**20**	**32**
Professional, scientific and technical services			
Professional, scientific and technical services (except computer system design and related services) <includes legal, accounting and consulting services>	17	17	34
Computer system design and related services	3	0	3
Total	**20**	**17**	**37**
Information media and telecommunications			
Publishing (except internet and music publishing)	0	3	3
Broadcasting (except internet)	3	0	3
Library and other information services	0	3	3
Total	**3**	**6**	**9**
Total Business Services	**38**	**62**	**100**

Source: ABS Census 2011, Working Population Data

Table 67. Business Services Sector Jobs - Break O'Day LGA 2001-2011

Jobs Break O'Day LGA 2011	Persons			Change
Business Services	**2011**	**2006**	**2001**	**2001-2011**
Financial and insurance services	22	21	8	13
Rental, hiring and real estate services	32	30	18	14
Professional, scientific and technical services	37	33	38	-1
Information media and telecommunications	9	16	22	-11
Total	**100**	**100**	**86**	**14**
Inadequately described/Not stated	8	16	0	8

Source: ABS Census 2001-2011, Working Population Data

4.10.3 Key Issues - Business Services

Future prospects for business services will depend on: population size and growth; the business mix in the area; and the strength of business activity.

The health of business services firms depend on the strength of the local and regional markets. This covers regional population growth and industry sectors, which require business support services.

Key Issues: Business Services	
Issue	**Direction/Actions**
Business growth is required	**Business Growth** The size and scale of regional business is a major driver of the demand for business services. - Regional business growth will be important for sustaining a vibrant local business services sector. - Growth in the tourism sector will have positive impacts on business growth and on the local and regional demand for business service..
St Helens as a regional business centre	**Servicing the Region** - As the population centre on the East Coast, St Helens will continue to be a hub for business services firms that target the broader region. - Any future decline in industry activity would have major negative impacts on business services firms in the area.
A new centre for business	**Servicing Broader Markets** The region is a good location for other specialist professionals seeking a lifestyle change, while still operating a business (eg. in consulting, technical services etc.). For some businesses like these location is not important but access to communications and transport are major factors. -Break O'Day has advantages in terms of: coastal and hinterland areas; other population centres in adjacent LGAs; fast internet access (via the NBN); and is within 2 hours of an airport (Launceston), which can provide access to national markets and clients. -Break O'Day is a good location to service other areas of an East Coast market. -It is within 2-3 hours of larger markets of Launceston and Hobart. **Attracting Professionals** There is the potential to attract professionals to the area, who are independent of location. This includes persons seeking to make a lifestyle change or transitioning to retirement, while still operating a business. Break O'Day can be marketed as a lifestyle change location for businesses and professionals. **Home Based Businesses** There is potential for development of home-based services businesses both as ongoing small businesses and as *incubators* at the start up stage. Council policies should encourage these businesses and ensure that they are able to access business development services (via the Business Enterprise Centre).

4.11 Government Funded Services

4.11.1 Overview

Government services are an important part of the regional economy. This covers health services, education services and local government services. These services are substantially funded by government and taxation (including local rates); and in most cases are delivered through public sector agencies (however some part of the health sector and education sector comprises private providers- doctors clinics, private hospitals , nursing homes, schools etc.).

Break O'Day (because of its location and the isolation of parts of the East Coast) plays a regional role, particularly in health services provision (with hospitals and health services at St Helens and St Marys). Future provision of services will depend on population size, government funding and decisions on the location and delivery of regional services.

4.11.2 Government Services Sector Jobs

Government funded services accounted for 493 jobs in 2011. These sectors are major employers of a women (363 or 74% of these jobs are held by females) and represented 27% of total jobs in the LGA in 2011.

- In health/community services (202 jobs), the major areas were residential care services (78); medical and other health care services (47); and social assistance services (40).
- In education and training (173) the major area was preschool and school education (157 jobs) and this covers primary and secondary education (government schools, Catholic schools).
- In public administration and safety (118) the major areas were: public administration (99)-mainly local government; and public order and safety (19)-police, ambulance and fire services.

Over the last 10 years, the number of jobs in these sectors increased by 148 from 345 in 2001 to 493 in 2011. The major growth was in preschool and school education (41 jobs); public administration (34 jobs); residential care services (20 jobs); and medical and other health care services (17 jobs).

These sectors are significant in that they usually represent continuous demand for services and are generally not affected by economic downturns or reductions in consumer spending. They also provide a significant number of the professional jobs located in a regional area.

Table 68. Government Funded Services Sector Jobs - Break O'Day LGA 2011

Break O'Day LGA 2011			
Government Funded Services	**Males**	**Females**	**Persons**
Health care and social assistance			
Health care and social assistance, nfd	0	10	10
Hospitals	3	24	27
Medical and other health care services	10	37	47
Residential care services	8	70	78
Social assistance services	3	37	40
Total	**24**	**178**	**202**
Education and training			
Education and training, nfd	4	0	4
Preschool and school education	36	121	157
Tertiary education	0	0	0
Adult, community and other education	3	9	12
Total	**43**	**130**	**173**
Public administration and safety			
Public administration and safety, nfd	0	0	0
Public administration	48	51	99
Defence	0	0	0
Public order, safety and regulatory services	15	4	19
Total	**63**	**55**	**118**
Total All Sectors	**130**	**363**	**493**

Source: ABS Census 2011, Working Population Data

Table 69. Government Funded Services Sector Jobs - Break O'Day LGA 2001-2011

Jobs Break O'Day LGA 2011	Persons			Change
Government Funded Services	2011	2006	2001	2001-2011
Health care and social assistance				
Health care and social assistance, nfd	10	9	0	10
Hospitals	27	30	20	7
Medical and other health care services	47	40	30	17
Residential care services	78	68	58	20
Social assistance services	40	37	31	9
Total	**202**	**184**	**139**	**63**
Education and training				
Education and training, nfd	4	3		
Preschool and school education	157	143	116	41
Tertiary education	0	0	0	0
Adult, community and other education	12	13	13	-1
Total	**173**	**159**	**129**	**44**
Public Administration and Safety				
Public administration	99	82	**65**	34
Public order, safety and regulatory services	19	12	12	7
Total	**118**	**94**	**77**	**41**
Total All Sectors	**493**	**437**	**345**	148

Source: ABS Census 2001-2011, Working Population Data

4.11.3 Key Issues - Government Funded Services

Key issues for the future of government funded services in Break O'Day are: the size, age and family structure of the regional population and its implications for local service demand; the continued level of government funding for services; government decisions on the service delivery models; and the role of regional based services.
For the future of Break O'Day it is important that St Helens continues its role as a key services centre for the East Coast region.

Key Issues: Government Funded Services	
Issue	**Direction/Actions**
Servicing a Regional Population	**Population** - Population size and structure is important for the maintenance of services and any future expansion in local and regional service delivery. - A declining population can lead to a scale back in services or changes to their point of delivery (eg. changes in education provision or health services delivery). This is a major issue with the current trend of families and moving out of the area due to a lack of employment opportunities or to pursue education opportunities. **Regional Role** - Due to isolation issues on the East Coast, Break O'Day performs a broader regional role in the delivery of health services (including primary care and some emergency services) and secondary education. - This is a role that is played by St Helens as a major service centre, and continued population growth in the LGA and adjacent areas is important to maintaining this role.

Key Issues: Government Funded Services	
Issue	**Direction/Actions**
Population trends and characteristics	**Population Trends** - The population of Break O'Day is projected to grow in the longer term, particularly in coastal areas. - A key driver of this is people being attracted to coastal centres for retirement and to centres which provide access to health services. - Attraction of a younger demographic is dependent on the availability of employment opportunities. - Over the last 5 years population growth has slowed and this has largely been driven by persons and families moving out of the area for employment reasons. A decline in resource based industries and a slower economy have meant that there has been no growth in jobs held by males (over the 10 year period to 2011). **Population Characteristics** - An ageing population has particular requirements for services including health services and aged care services (including residential aged care options and home based care). - The projected growth in the population and its age structure means there will be future demand for health services and residential care. - However this demand can be undermined if families continue to move out of the area (aged parents in care usually want to be located close to their family). - A decline in families and school aged children has an impact on the education services available in an area.
Professional workforce	**Attracting Professionals** - Government funded services generally employ professionals and para-professionals. - A major issue for many regional areas (including Break O'Day) is the ability to attract professionals to take up available jobs. - In health this covers doctors and dentist and specialist allied health providers. - There are also issues in attracting other professionals (eg. engineers, town planners, accountants, lawyers etc.). - Discussions with businesses and other organisations indicate that recruitment of professionals is an issue in the region.
Funding of services	**Future Funding** A major issue for the region is future levels of government funding for health services and for other services delivered through local government. With tight government budgets (national and state) reductions in grants and programs can impact on service delivery in regional areas. A reduction in funding can lead to a scale back in regional delivery of services and a reduction in local jobs.

5. Break O'Day Economic Development Strategy

5.1 Economic and Social Context

Recent data highlights a number of key features of the Break O'Day LGA, and these patterns were also confirmed in discussions with businesses in the LGA and in the public consultations.

5.1.1 Population - A Slow Down

- Population: the population is relatively small at around 6000 persons in 2011; it is ageing with retirees being attracted in the area; and some younger persons and families are leaving for education and for full time job opportunities.
- Locations: the population is focused on coastal locations (76%). St Helens is the major centre (with 35% of the population) and Stieglitz (10%); other centres are St Marys (13%) and Scamander (12%). Around 38% of dwellings (1607) are holiday houses.
- Trends: the population grew in the period 2001-2006, but was flat over the last 5 years to 2011. These more recent trends of a loss of population, are related to: a decline in the number of full time jobs in the area (jobs loss from resource sectors including agriculture, forest industries, fishing); and the impacts of a slow economy and weakening visitor market on businesses in the LGA. Long term projections are for growth in the population as people are attracted to the coastal lifestyles. However with the static population numbers in the last 5 years, the long term targets are unlikely to be achieved and will need to be revised downwards.

5.1.2 Regional Economy -Transitioning to A Service Economy

There are several key features of the regional economy:

- The industry base of the area has narrowed and it has become a service economy covering the local/regional population and the visitor market.
- There are limited regional export industries: there has been a decline in the traditional resource based sectors of fishing, forest products and agriculture. There is future potential to develop agribusiness in the region as part of diversification.
- Much of industry located in the industrial areas is light industry servicing local and regional industries (eg. agriculture, mining, building and construction).
- Most businesses are small businesses and many are owner operated with no employees (or employing family members only).
- Tourism is important for St Helens - but the sector has been under pressure with declining visitor numbers over the last 3 years. The tourism sector is season and highly dependent on the visitor numbers in the summer and Easter season peaks and school holidays. Visitor numbers are low over winter.
- Services - the major areas of employment are in-person services that are servicing a local population (eg. jobs in retail, education, health etc.) or delivering services to businesses (eg finance and business services).
- The economic slowdown has impacted on the region - the LGA went from strong growth in jobs in the period 2001-2006 to almost no growth in the period between 2006-2011.
- Job trends have had several dimensions: for a decade no increase in the total number of jobs that traditionally employ males (except for construction and some manufacturing jobs); a significant increase in service jobs that tend to employ females (eg. in health, retail, and education), with many of these new service jobs being part-time jobs.
- The only major current new industry project in the region is the Hard Rock Coal development, which will generate around 60-70 direct jobs in the construction phase, and up to 200 direct jobs when the mine is fully operational.

These jobs patterns reflect the major changes that have taken place, with declines in resource based industries and the transition to a services economy.

5.1.3 Trends 2001-2011 - Growth Then a Slow Down

In summary there have been two distinct periods for the region over the last decade:

- A growth period (2001-2006): with population, business activity and jobs increasing in most sectors. This period was characterised by a strengthening economy, significant growth in tourism activity and high levels of construction activity.
- A slowdown (between 2006-2011 and continuing): this period was characterised by: a slowdown in population growth; limited growth in jobs in most sectors; a decline in jobs in regional resource industries (forestry, fishing and agriculture); a slowdown in construction activity; and a weakening in the tourism market (with declining visitor numbers). The two major drivers of the local economy - population growth and tourism activity contracted in this period. This was overlaid by a general slowing in the State and national economy.

Other features of the Break O'Day economy have included the following.

- Growth has been strongest in coastal areas, and in the main centre of St Helens.
- A unique jobs pattern with no growth in jobs held by males and an increase in jobs in sectors where jobs are mainly held by females. The total jobs held by males have been static over the decade (2001-11) and the jobs for females have increased (187 jobs) by 28% (with most of this growth occurring over the 2001-2006 period -145 additional jobs). The total number of jobs held by females increased from 670 in 2001 to 857 in 2011. For males the total number of jobs was 820 in 2001 and 825 in 2011.
- A decline in full time jobs: the net effect of these changes has been a significant decline in the number of full time jobs in the region. Females are concentrated in in-person services jobs (76% of jobs that they held in 2011) and these are the jobs that have been increasing in the region over the last decade (eg. in health care and social assistance; education and training; retail trade; and accommodation and food service). Many of the jobs in these sectors are part-time.
- The lost full time jobs in the resource based industries have not been replaced by full time jobs in other sectors. This trend has major implications for household incomes and has contributed to a weakening in regional consumer expenditure.
- Many of the new services jobs are reliant on government funding (eg. in health and education). This creates vulnerability for the region if there are future reductions in government funding or changes to service delivery models and location of delivery points.
- Unemployment declined dramatically during the growth period 2001-2006. However the rate has increased over last 3 years, which reflects the combination of structural change in jobs in the region and the flattening in the regional economy. Recent Department of Employment data shows unemployment has increased from 6.0% in mid-2009 to 10.3% in mid-2013.

Table 70. Jobs in the Region - Break O'Day LGA 2001-2011

Break O'Day LGA				Change	Change	Change	%change
Jobs	2011	2006	2001	2001-06	2006-11	2001-11	2001-11
Males	825	822	820	2	3	5	0.6
Females	857	813	670	143	44	187	27.9
Persons	**1682**	**1635**	**1490**	**145**	**47**	**192**	**12.9**

Source: ABS Census 2011 - Working Population Data Time Series

5.1.4 Key Issues - Structural Change and a Slower Regional Economy

In summary, the Break O Day Economic Development Strategy is set within the context of:

- A slow-down in population growth in the LGA in the 2006-2011 period after a strong growth performance between 2001 and 2006. The slow-down is being driven largely by departures of families from the region, in response to the jobs situation.
- A decline in activity and employment in resource based industries in the region (forestry, agribusiness, fishing), as a result of environmental issues and market changes.
- A weakening in the tourism sector with a major fall in visitor numbers to the East Coast Region over the last 3 years.
- A static jobs situation, particularly in relation to jobs held by males (which have not increased in total numbers for over a decade).
- A decline in regional spending, which can be attributed to the deteriorating jobs situation and its impacts on household incomes.
- Ongoing pressures on the retail and services sector over the last 3 years, which have led to further falls in employment and some small business closures (mainly in retail).

5.2 Strategy Objectives

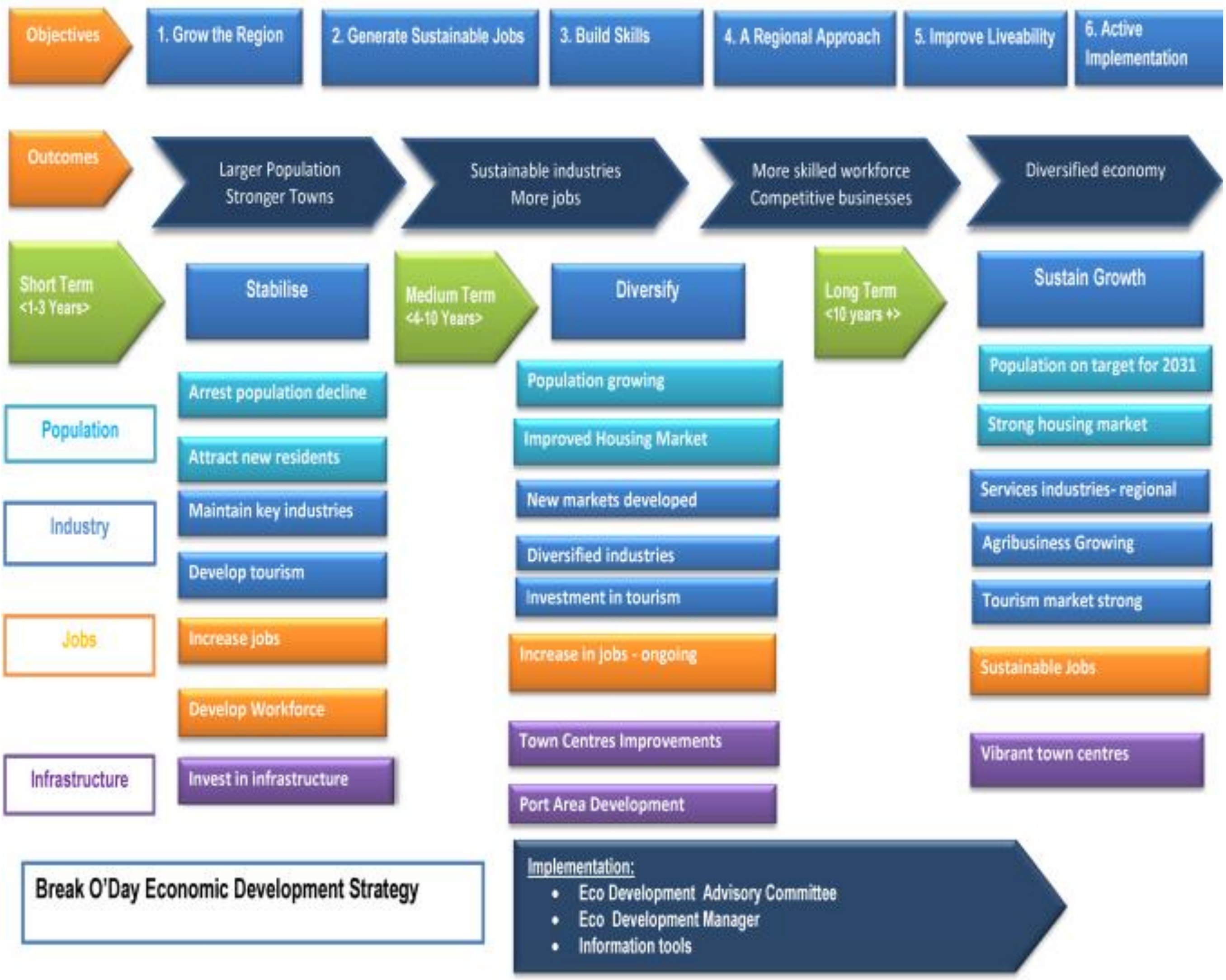
The economic strategy has a long term horizon of 15-20 years. However it also needs to address short term and medium issues to provide a foundation for sustainable growth. The key objectives are focused on the following.

Strategy Objectives
Objective 1: Growing the region: through encouraging sustainable population growth in the LGA.
Objective 2: Generating ongoing sustainable jobs: through growing the economy; building on existing industries; and encouraging new activities.
Objective 3: Building skills and a productive workforce.
Objective 4: Reinforcing the strategic role of St Helens as a regional service centre.
Objective 5: Improving liveability of the towns and villages: through recognising the importance of place and improving infrastructure and connectivity.
Objective 6: Taking an active approach to economic development: to implement all elements of the strategy. This includes new structures in Council and improved regional and industry information.

These objectives are consistent with the goals of the broader regional strategy for the Northern Region prepared by the Department of Economic Development, Tourism and the Arts (DEDTA).[73] The key goals of the *Northern Tasmania Plan* are: Goal One: To support and grow businesses in the northern region; Goal Two: To maximise economic potential in key sectors in the northern region; Goal Three: To improve the social and environmental sustainability of the economy in the northern region; and Goal Four: To support and grow communities in the northern region. [74]

The objectives of the Break O'Day strategy will be achieved through a proactive approach, which also takes a broader regional approach to economic development (in relation to the Northern Region and the East Coast). This involves continuing regional collaboration, which is also identified as an important part of the Northern Tasmania Plan.[75]

73 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P112
74 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P51
75 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P121


Objectives
1. Grow the Region
2. Generate Sustainable Jobs
3. Build Skills
4. A Regional Approach
5. Improve Liveability
6. Active Implementation
Outcomes
Larger Population Stronger Towns
Sustainable industries More jobs
More skilled workforce Competitive businesses
Diversified economy
Short Term <1-3 Years>
Stabilise
Medium Term <4-10 Years>
Diversify
Long Term <10 years +>
Sustain Growth
Population
Industry
Jobs
Infrastructure
Arrest population decline
Attract new residents
Maintain key industries
Develop tourism
Increase jobs
Develop Workforce
Invest in infrastructure
Population growing
Improved Housing Market
New markets developed
Diversified industries
Investment in tourism
Increase in jobs - ongoing
Town Centres Improvements
Port Area Development
Population on target for 2031
Strong housing market
Services industries- regional
Agribusiness Growing
Tourism market strong
Sustainable Jobs
Vibrant town centres
Break O'Day Economic Development Strategy
Implementation:
• Eco Development Advisory Committee
• Eco Development Manager
• Information tools

5.3 Strategic Directions

5.3.1 Overview

There are a number of strategic directions in relation to the future development of Break O'Day. These directions and elements are key components of the economic development strategy.

The table below maps the strategy directions and elements against objectives, and show how they impact on the towns and locations within the LGA.

The key economic priorities for the region are: increasing the population; strengthening businesses in the region to generate sustainable jobs; increasing tourist visitors to the region; and maintaining St Helens' role as a regional service centre. The strategy also recognises the importance of place and the need for a broader regional approach.

These elements of the strategy need to be implemented as priorities, with some actions also required at an industry sector level (mainly in partnership with other agencies .

Table 71. Overview - Economic Development Strategy

Objectives and Strategic Directions	Elements and Actions
1.Growing the region	
1.1 Growing the population **<Major Priority>**	**Increasing population growth is fundamental to the future of Break O'Day- the key driver of local business** • Attracting Residents- action required to promote the region as a place to live and work.
1.2 Developing a brand **<Major Priority>**	• Develop a place brand for Break O'Day.
2. Generating ongoing sustainable jobs	
2.1 Strengthening regional industries **< Priority>** 2.2 Attracting new businesses **< Priority>** 2.3 Develop regional tourism **<Major Priority>**	**A targeted approach is required to strengthen and develop key industries** • Strengthen - environment/resource based industries (eg. fishing, forest products, agriculture, and tourism). These sectors are priority sectors in the Northern Region Plan.[76] • Agribusiness -facilitate diversification in agriculture including vegetables, fruit (eg. berries) and wine and value added food products (vegetables, fruit, wine, cheese). • Develop services businesses in the region. • Attract and develop new businesses. • Tourism – a major priority: take a regional approach to product development, infrastructure and marketing.
3. Building skills and a productive workforce	
3.1 Developing workforce skills **< Priority>** 3.2 Developing small business skills **< Priority>**	**Skills are important for competitive businesses and for future employment opportunities.** There are identified skill gaps in the region which relate to skilled trades, professions, agribusiness and tourism/ hospitality. • Develop and implement a regional skills strategy in partnership with local businesses. • Link to state level industry skill strategies covering hospitality, agribusiness (regional farm labour pool).[77] • Utilise the Trade Training Centre for regional skills programs. • Develop skills in small business – utilise the *Skilling Small Business for Growth Program* to develop business skills; and the *Digital Ready Program*.
4.Pursuing a regional approach	
4.1 Taking a broader regional economy/markets approach **<Major Priority>** 4.2 Developing St Helens as a service centre **<Major Priority>**	**Break O'Day is part of a broader regional economy.** • Regional Centre - continue to develop St Helens strategic role as a District Town and as regional service centre. • Regional Markets - recognise the extent of regional markets and regional industries in the Northern Region; link to the Northern Tasmania Plan; and collaborate on industry development initiatives and the regional tourism market. • Encourage businesses to expand markets. • Encourage home based businesses and business start-ups , through the Business Enterprise Centre. • Ensure businesses access industry development programs. • Take a leadership role with businesses.

76 Agribusiness includes: processed food, dairy, fruit, vegetables, wine and meat, advanced manufacturing (metals, engineering , machinery and equipment.) Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P78
77 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

Objectives and Strategic Directions	Elements and Actions
5.Improving liveability of the towns and villages	
5.1. Recognising the importance of place **<Major Priority>** 5.2 Improving infrastructure **<Major Priority>**	**Place is important in terms of attracting residents, businesses and visitors.** Quality of place covers a range of elements including: environment - coastal and hinterland; town centres - design/layout and facilities; precincts - urban and village (St Helens, St Marys); bays /beaches (St Helens and coastal villages) - activation of areas. • Plan the development of town centres • Encourage investment in key locations. • Promotion of Break O'Day as place to live.
	Improved infrastructure is important for economic and community development. It comprises both public and private infrastructure. <Invest in strategic infrastructure>. Economic and community infrastructure includes: • Precincts - improve town centres (eg. St Helens and St Marys). • Develop tourism infrastructure in major centres and in coastal villages/bays. • Improve marine infrastructure (eg. waterfront at St Helens- develop facilities in precinct/ maintain as commercial port; barway access).[78] • Develop bike trails and walking tracks to link areas and for active use of national park areas. • Aerodrome - maintain the facility for potential future long term uses. • Regional links - upgrade of roads linking the north east region to improve tourist access. • Access to the NBN will provide a foundation for service businesses.
6. Taking an active approach to economic development	

6.1 Facilitating economic development
< Major Priority>
	Council needs to play a proactive role in facilitating economic development and future jobs. This includes:
	• A commitment to a clear economic development strategy.
	  ○ Establishing a reputation for encouraging/facilitating business expansion and new business and investment in the region.
	  ○ More active engagement with businesses in the region.
	• Regional Approach
	  ○ Implementation of the State Government's *Regional Planning Initiative* via a responsive planning system at the local level.[79]
	  ○ Involvement with other Councils in the broader region on economic development (on a partner basis and as part of Northern Tasmania Development (NTD)).[80]
	• New structure including: an Economic Development Advisory Committee; and an Economic Development Manager. working with business and facilitating major development proposals and projects.
	• Developing business cases for new infrastructure and proposals for government funding.

6.2 Information **< Priority>**	**Council needs to have up-to date information available.** • Utilise information in the economic strategy. • Develop a regional prospectus and business content area of website. • Develop template for business cases and submissions. • Conduct annual survey with businesses. • Prepare annual report on regional economy and strategy progress. • Update information in strategy every 2 years.

78 DEDTA has partnered with Marine and Safety Tasmanian (MaST), Tasman, Sorell, Glamorgan Spring Bay and Break O'Day Councils to develop an East Coast Marine Infrastructure Strategy.
79 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P66
80 http://www.northerntasmania.org.au/ (NTD involves the 8 Councils in Northern Tasmania. involves: Break O'Day, Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar)

Table 72. Locational Impacts – Break O'Day LGA

Locations	Pop. 2011	Share	Role	Future Economic Development	1.Growing the Region	2. Generating Sustainable Jobs	3.Building Skills	4. Taking a broader regional	5. Improving Liveability	6.Active Approach
	Persons	%								
Coastal										
St Helens	2173	35.1	Major centre for the area and location of jobs in retail services, health, – seafood, manufacturing, etc. [81]	Population growth and tourism will have major impacts on St Helens businesses. Business services dependent on scale of business activity.	▲▲▲	▲▲▲ Tourism Manufact Services Health	▲▲ Tourism Services Health Trades	▲▲▲	▲▲▲	▲▲
Stieglitz	643	10.4	Residential some accommodation, aerodrome, aquaculture	Residential location for people working in St Helens.	▲▲	▲▲	▲	▲		▲
Binalong Bay	210	3.4	Residential and tourist location – café and accommodation	Major impacts from tourism strategy (visitor numbers). Dive industry development if Tobruk secured.	▲	▲▲ Tourism	▲	▲	▲	▲
Ansons Bay	371	6.0	Residential , national park areas	Major impacts from tourism strategy (visitor numbers)	▲	▲	▲	▲	▲▲	▲
Pyengana			Dairy farming , Pyengana Dairy Co., other tourism	Major impacts from tourism strategy (visitor numbers)		▲▲	▲			▲
Beaumaris	282	4.6	Residential and some tourist accommodation	Major impacts from tourism strategy (visitor numbers)	▲	▲ Tourism	▲			▲
Scamander	719	11.6	Residential and tourist area – accommodation, local retail and services, cafes	Major impacts from tourism strategy (visitor numbers)	▲	▲ Tourism	▲		▲▲	▲▲
Falmouth/Four Mile Creek	195	3.2	Residential and agribusiness, White sands resort, brewery, winery	Major impacts from tourism strategy (visitor numbers) and from agribusiness development		▲	▲			▲
Seymour	141	2.3	Coastal farming area	Impacts from agribusiness strategy		▲ Agribusiness				▲
Total Coastal	**4734**	**76.5**								
Inland										
St Marys	800	12.9	Main inland centre – local retail, health services, schools. Forestry and mining located in the area.[82]	Some impacts from tourism strategy – visitor numbers. Mining development will provide jobs for local residents. Need to maintain employment .	▲▲	▲▲ Tourism Mining Services Health	▲▲ Tourism Services Health Trades	▲▲	▲▲	▲▲
Fingal	366	5.9	Inland town, local retail and services, café, accommodation, farming areas.	Agriculture impacts and visitor stops	▲	▲ Mining Agribusiness		▲		▲
Mathinna	287	4.6	Inland town , forest and agribusiness	Agriculture impacts and visitor stops		▲ Agribusiness		▲		▲
Total Inland	**1453**	**23.5**								
Total Coast & Inland	**6187**	**100.0**								

Source: MCa Analysis 2013 <Note: ▲▲▲ = primary impacts; ▲▲ = major impacts; ▲ = impact>

81 See Appendix B for additional information on St Marys.
82 See Appendix C for additional information on St Helens.

5.3.2 Objective 1: Growing the Region

Population growth and associated economic growth is fundamental to the future of Break O'Day and its towns and villages. An active approach to economic development is required to achieve the future population targets. A larger population will underpin local businesses and will generate new employment opportunities.

Objective	Strategic Directions	Elements	Actions
1.Growing the Region			
1.Growing the Region	**1.1 Growing the population <Major Priority>**	**Increasing population growth is fundamental to the future of Break O'Day**. - A larger population will support sustainable service businesses and provide local jobs. Attracting Residents - action is required to promote the region as a place to live and work. **<Outcomes: growing population; larger local market; stronger local businesses>**	**Employment** - More jobs are required to maintain the population in the economic active age groups. **Attracting Residents** • The slow-down in population growth in the LGA has been driven by families leaving the LGA. • - Resident attraction is required to achieve the projected future growth to support a sustainable local economy. • This requires: strengthening of regional industries and jobs; and active promotion of Break O'Day as place to live, work and to operate a business (marketing the region)
	1.2 Promoting Place (Brand) <Major Priority>	**Break O'Day needs to be more visible.** There is a need to develop a place brand to be used in promoting Break O'Day as a place for living, for working, for business and to visit.	**Brand** • The brand identity would be used in promotion of Break O'Day for tourism and economic development. It would be utilised on place signage, in promotional material and on the tourism and business content areas of websites.

5.3.3 Objective 2: Generating Jobs

There is a need to generate additional jobs in the region to provide employment for a larger population. This will involve maintaining and diversifying some of the resource based industries (including value added processing); building on the regional service role of St Helens; and developing a more sustainable tourism sector.

Objective	Strategic Directions	Elements	Actions
2. Generating ongoing sustainable jobs			
2.Generating ongoing sustainable jobs	**2.1 .Strengthening regional industries <Major Priority>** **2.2 Attracting new businesses < Priority>** **2.3 Develop regional tourism <Major Priority>**	**A targeted approach is required to strengthen and to develop key industries . This includes:** -Strengthening - environment/resource based industries (eg. fishing, forest products, and agriculture). -Diversify into new areas of agribusiness. -Target key industry sectors: services, agribusiness, mining support, and tourism. These sectors are priority sectors in the Northern Region Plan.[83] **<Outcomes: stronger resource based industries; new agribusiness opportunities; more jobs>** -Developing service businesses - including St Helens role as a regional service centre. **<Outcomes: strengthening of service businesses; extended regional markets; more service sector jobs>** -Developing regional tourism – to boost visitor numbers and improve yields. **<Outcomes: increased visitor numbers; sustainable tourism sector; more local jobs>**	**A Targeted Approach to industry development.** **Resourced Based Industries:** **Maintain and Diversify** • Agribusiness: facilitate diversification in agriculture including vegetables, fruit (eg. berries). • Wine - potential to develop cool climate wine industry - link to a region wide industry strategy. • Food products - (eg. dairy, beef, wine etc.) Develop value-added food products (vegetables, fruit, wine, cheese)- positioned in the premium products segment • Seafood - remains a major priority (fishing and aquaculture). **Service Businesses** • Maintain and expand jobs through strengthening existing services businesses and through business attraction. • Utilise the Business Enterprise Centre in a proactive way for business development (to encourage business start-up and strengthening of emerging businesses). [84] • Encourage local use of the Growing Business Program. [85] • Encourage development of home-based businesses. **Regional Tourism** • Develop a sustainable tourism industry (implement the new long term regional strategy and develop the market). • Build on the Bay of Fires experience. [86] • Develop market segments including mountain bikes, golf and diving. • Develop food and wine experiences (eg. trails like *Tuckerbox Trail* and farmers markets). • Further develop fishing charters and boat hire. • Examine the business case for securing the Tobruk as a diving wreck. • Review tourism infrastructure requirements for the region.

83 Agribusiness includes: processed food, dairy, fruit, vegetables, wine and meat, advanced manufacturing (metals, engineering , machinery and equipment.) Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P78
84 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P72
85 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P73
86 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P94-95

5.3.4 Objective 3: Building Skills

Workforce skills are important for the development of local businesses and for employment opportunities. There are regional workforce recruitment and skill gaps that were identified by businesses in the LGA.

The key role for Council is ensuring that local businesses/employees can participate in workforce strategies; and to broker skills programs for strategic sectors in Break O'Day. This involves developing a local workforce strategy and linking into broader regional and industry skills strategies. The Break O'Day Business Enterprise Centre can be used to link businesses to relevant skills programs for employees and to business programs.

Objective	Strategic Directions	Elements	Actions
3.Building skills and a productive workforce			
3. Building skills and a productive workforce	3.1 Developing workforce skills **< Priority>**	**Skills are important for competitive businesses and for future employment opportunities.** There are identified skill gaps in the region which relate to skilled trades, professions, agribusiness and hospitality. There are also workforce issues in several key sectors including agribusiness and tourism – there are often difficulties in recruiting employees with the required skill sets. **<Outcomes: access to skilled employees; improved skills; more productive workforce >**	**Workforce Skills** • Develop and implement a regional skills strategy in partnership with local businesses. • Link to state level industry skill strategies covering hospitality, agribusiness (Hospitality Workforce Strategy; Agribusiness Workforce Strategy; and regional farm labour pool).[87] • Agribusiness - develop skills for value added processing (vegetables, fruit, wine, and cheese). • Utilise the Trade Training Centre for regional skills programs.[88] • Establish links with TasTAFE in relation to local delivery of vocational education and training programs.
	3.2 Developing small business skills **< Priority>**	There is potential to improve business skills. **<Outcomes: business skills for new start-ups; improved businesses>**	**Business Skills** • Develop skills in small business – utilise the Skilling Small Business for Growth Program to develop business skills; and the Digital Ready Program. [89] • Utilise Break O Day Business Enterprise Centre as a vehicle for small business programs. **<The key role for Council is ensuring that local businesses can participate in strategies; and to broker skills programs for strategic sectors in Break O'Day.>**

87 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65
88 http://education.tas.edu.au/sthelensdistricthigh/Pages/NEET.aspx
89 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P64

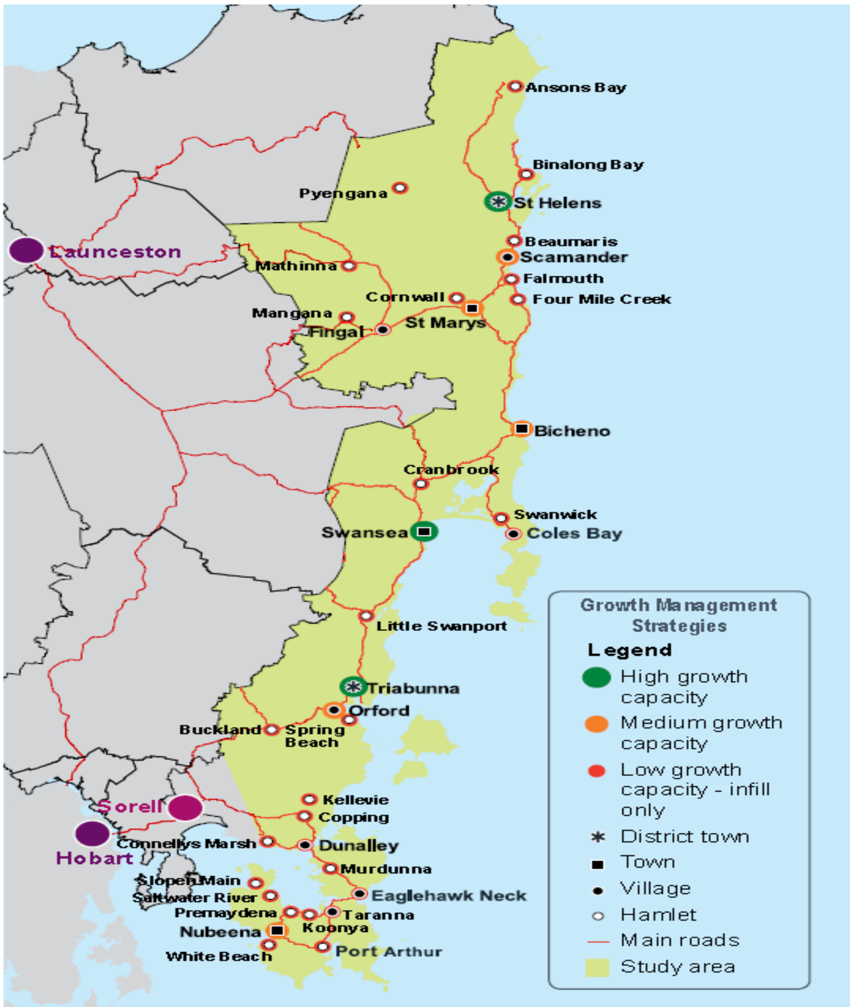
5.3.5 Objective 4: Pursuing a Regional Approach

Break O'Day is part of a broader region with businesses servicing north eastern and east coast markets. The economic development strategy needs to recognise this and link to regional initiatives that are identified in the Northern Region Plan. A regional approach is required to develop the tourism market and this is being implemented with the new regional tourism organisation.

On a location basis, Vision East 2030 identifies St Helens (District Town) as having high growth capacity and St Marys (Town) and Scamander (Village) as having medium growth capacity.[90]

Roles are also designated for the main towns the Regional Land Use Strategy of Northern Tasmania: St Helens is a Major Activity Centre; St Marys is a Suburban Activity Centre; and Fingal is a Local Centre.[91]

It needs to be recognised that a large number of current jobs are in St Helens. Future growth in St Helens will open up jobs opportunities for residents who live in the town and in the broader region.



Source: Vision East 2030 - The East Coast Land Use Framework, December 2009, East Coast Councils P62

90 Vision East 2030 ~ The East Coast Land Use Framework ~ December 2009, East Coast Councils P62
91 Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P72

Source: Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P72

Regional Councils have an organisation to work on development issues for the Northern Region - Northern Tasmania Development (NTD). The organisation involves: Break O'Day, Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar Councils. Major projects have included: an Integrated Transport Plan, with the Department of Infrastructure, Energy and Resources; Bell Bay Report; North Eastern Mountain Bike Project; Northern Tasmania Industrial Land Study; and Regional Planning Initiative.[92]

92 http://www.northerntasmania.org.au/

Objective	Strategic Directions	Elements	Actions
4. Taking a Regional Approach			
4.Taking a Regional Approach	4.1 Taking a broader regional economy/markets approach. **<Major Priority>**	**Break O'Day is part of a broader linked regional economy.** Businesses are part of broader regional markets for products and services. **<Outcomes: markets extended for local businesses>**	**Regional Markets** • Recognise the extent of regional markets and regional industries in the Northern Region. • Link the Break O'Day economic strategy to key elements of the Northern Region Plan.[94] • Work with the adjacent East Coast LGAs (Dorset and Glamorgan Spring Bay) and other Northern Region Councils. • Encourage ongoing regional cooperation on economic development and industry development – integrate strategies and actions (covering industry development, employment and skills development, regional tourism). • Broader regional cooperation is underway on tourism market development (tourism product, infrastructure and marketing) and on regional infrastructure requirements (eg. marine infrastructure, town infrastructure). • Involvement with other Councils in the broader region on economic development (on a partner basis and as part of Northern Tasmania Development (NTD).[95]
	4.2 Developing St Helens as a service centre. **<Major Priority>**	St Helens has a strategic role as a District Town and as regional service centre. This role has been identified in the Regional Land Use Strategy of Northern Tasmania; and in the Vision East 2030 - The East Coast Land Use Framework.[93] **<Outcomes: regional role of St Helens strengthened>**	**Regional Centre** • Continue to develop St Helens' strategic role as a District Town and as regional service centre.

5.3.6 Objective 5: Improving Liveability

Liveability and the quality of place are important for residents, businesses and visitors. There are a range of infrastructure improvements that will contribute to liveability and to the attraction of residents and visitors to the area.

Vision East 2030 has a vision for the East Coast which balances the environment and development.[96]

> **"The overarching vision for the East Coast is: To enhance the community and economic potential of the East Coast, maintain its natural and cultural heritage assets and values as a living environment, and establish a hierarchy of service centres with appropriate transport linkages to the region and between the settlements."**
> **Source: Vision East 2030 - The East Coast Land Use Framework, December 2009, East Coast Councils P159**

Local vision statements have also been developed for the individual municipalities.

> **"The vision for the Break O'Day municipality is: Promote St Helens as one of the sub-regional service centres and improve tourist accessibility whilst maintaining a sense of seclusion to protect the iconic coastal landscapes."**
> **Source: Vision East 2030 - The East Coast Land Use Framework , December 2009, East Coast Councils P159**

From an infrastructure perspective, the Urbis Report identifies that the industrial estate at St Helens has limited scope for expansion due to closeness to residential areas. While there are some vacancies and no

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93 Vision East 2030 -The East Coast Land Use Framework, December 2009, East Coast Councils P62; Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P72

94 Councils of Northern Tasmania Development have agreed to the regional priorities identified in the Northern Tasmania Plan.

95 http://www.northerntasmania.org.au (NTD involves the 8 Councils in Northern Tasmania).

96 Vision East 2030 -The East Coast Land Use Framework, December 2009, East Coast Councils P62; Regional Land Use Strategy of Northern Tasmania JMG Engineers and Planners September 2011 P72

immediate demand for additional space, longer term provision needs to be made for additional space with appropriate buffers from residential precincts.[97]

Objective	Strategic Directions	Elements	Actions
5.Improving liveability of the towns and villages			
5.Improving liveability of the towns and villages	5.1. Recognising the importance of place **<Major Priority>**	**Place is important in terms of attracting residents, businesses and visitors.** [98] Quality of place covers a range of elements including: environment, town centres,/precincts, waterfront/ bays. **<Outcomes: improved town centres; attraction of visitors; strengthened retail activity>**	**Improving Place** The quality of place has a number of elements. • Environment - maintaining coastal and hinterland assets. • Town centres - improving design/layout and facilities. • Precincts - improvements to town centre areas (St Helens, St Marys). • Waterfront (St Helens and coastal villages) - activation of areas. • Bays-improved facilities for visitors while maintaining the environment. • National Park areas-improved facilities for visitors (eg. trails and bike tracks). Detailed requirements are contained in other reports that have been prepared as part of the Municipal Management Plan.
5.Improving liveability of the towns and villages	5.2 Improving infrastructure **<Major Priority>**	**Improved infrastructure is important for economic and community development. It comprises both public and private infrastructure**. **<Outcomes: improved town infrastructure; improved tourism infrastructure – visitor attraction; improved access to coast>**	**Improving Infrastructure** Key requirements for Break O'Day in terms of economic and community infrastructure include the following. Details of specific infrastructure are contained in other reports that form part of the Municipal Management Plan. **Town Centres** • Precincts - improve town centres and traffic movements (eg. St Helens and St Marys). • Ensure provision for future floor space requirements - retail, commercial and light industrial. • Industrial land - allow for development of industrial land at St Helens and Scamander.[99] **Tourism** • Tourism is a significant economic activity and investment in tourism infrastructure needs to improve at major destinations such as Steiglitz, Binalong Bay, St Helens and Scamander. • Waterfront (St Helens) - development of facilities covering the wharf area, marina, and the precinct. Activate the area while ensuring it is maintained as a commercial port. Infrastructure works to clear the Barway. • DEDTA has partnered with Marine and Safety Tasmanian (MaST), Tasman, Sorell, Glamorgan Spring Bay and Break O'Day Councils to develop an *East Coast Marine Infrastructure Strategy*.[100] • Extend bike paths and develop mountain bike trails and walking tracks to link areas and to utilise national park areas. **Transport** • St Helens Airstrip - maintain the facility and its potential for future long term uses. • Transport - upgrade of roads linking the north east region.

97 St Helens and Surrounds Structure Plan (Draft) , Urbis , September 28 2012 P37
98 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P116
99 St Helens and Surrounds Structure Plan (Draft) , Urbis , September 28 2012 P36-37
100 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P114

Floor Space

Population size has implications for future requirements in terms of floor space for retail, commercial and light industrial activities. The following are the long term population projections prepared by Urbis. As indicated the population projections for Break O'Day align with our analysis of the population outlook and take account of recent slow- downs.

Table 73. Population Projections - Break O Day Selected Years to 2030

Population Projections	Break O Day	St Helens	St Marys
2011 Census	**6194**	**2816**	800
Projections (Urbis)			
2021	**6,822**	**3,102**	881
2030	**7,309**	**3,323**	944
Change 2011-2030			
No.	1,115	507	144
% change	**18.00**	**18.00**	**18.00**

Source: St Helens Structure Plan – Background Report (Draft), Urbis 2012 P17

The following are floor space estimates based on a review of maps in May 2013 and are indicative of current floor space. They are not based on a survey of the two town centres, which would measure both space and allow for qualitative judgements on particular sites.

Table 74. Floor Space Estimates - St Helens and St Marys 2013 (Google Maps)

Floor Space Estimates (2013)	St Helens m2	St Marys m2
Retail & Food Service Use	16,232	3319
Commercial Office Use	3352	507
Community Use (includes hospital & aged care)	7158	3500
Community Use Schools	5267	3600
Community use (offices)	1571	967
Accommodation (motels)	4969	0
Total Floor Space	**38,549**	**11,893**

Source: Analysis by TCG and MCa (based on analysis of Google maps).

The following provides some estimates of future floor space needs to 2030. These are based on population and employment projections. A larger population has implications services and for floor space for businesses and other used. It shows that in the period to 2030 an estimated 2845 m2 of retail and food service space could be required for growth.

Table 75. Floor Space Estimates - St Helens and St Marys 2011-2030

	St Helens			Change	St Marys			Change
Floor Space Based on Employment Estimates	2011 m2	2020 m2	2030 m2	2011-30 m2	2011 m2	2020 m2	2030 m2	2011-30 m2
Retail & Food Service Use	15800	17248	18645	2845	2670	2941	3151	481
Commercial Office Use	1540	1681	1817	277	380	419	448	68
Community Use (includes hospital & aged care)	7500	8187	8850	1350	2000	2203	2360	360
Community Use Schools	3400	3712	4012	612	1840	2027	2171	331
Community use (offices)	2150	2347	2537	387	420	463	496	76
Accommodation (motels)	4200	4585	4956	756	630	694	743	113
Total Floor Space	**34590**	**37759**	**40818**	**6228**	**7940**	**8745**	**9369**	**1429**

Source: MCa Analysis based on analysis of population and employment.

5.3.7 Objective 6: Taking an Active Economic Development Approach

Council needs to play a proactive role in facilitating economic development and future jobs in the region. This requires a new approach to planning and working closely with businesses and investors. Council needs to take leadership on regional initiatives affecting the north eastern region.

A new advisory structure and senior economic development position is also required comprising the following.

- Economic Advisory Group - this group should be an advisory group to Council and have business and Council members.
- Economic Development Manager - a designated position to lead economic development (including tourism). This position should report to the General Manager.

Objective	Strategic Directions	Elements	Actions
6. Taking an active approach to economic development			
	6.1 Facilitating economic development **<Major Priority>**	**Council needs to play a proactive role in facilitating economic development and future jobs.** **<Outcomes: increased capacity to secure new investment; supportive environment for local businesses>**	Actions required are: • A commitment to a clear economic development strategy. o Establishing a reputation for encouraging/facilitating business expansion and new business and investment in the region. o More active engagement with businesses in the region. • Regional Approach o Implementation of the State Government's Regional Planning Initiative via a responsive planning system at the local level.[101] o Involvement with other Councils in the broader region on economic development (on a partner basis and as part of Northern Tasmania Development (NTD)).[102] • New structure for economic development including: o Economic Development Advisory Committee. o Economic Development Manager.
	6.2 Information **< Priority>**	**Council needs to have up-to date information available.** **<Outcomes: ability to provide businesses and investors with industry and regional information; improved business cases>**	Actions required are: • Utilise information in the economic strategy. • Develop regional prospectus and business content area of website. • Develop template for business cases and submissions. • Conduct annual survey with businesses. • Prepare annual report on regional economy and strategy progress. • Update information in strategy every 2 years. • Review of strategy and progress on implementation (every 2 years).

The following provides details of the recommended new structure for economic development for Break O'Day Council.

New Structure for Economic Development	
Economic Advisory Group	This group should be an advisory group to Council and have a membership comprising up to 3 Councillors and 5 business people and 2 community representatives. The business representatives would comprise: 1 nominee of the Break O'Day Chamber; and the others being individual appointments. In making the individual appointments, the major industry sectors (agribusiness, tourism, retail, business services) and locations should be represented. The group should meet 4 times per year.
Economic Development Manager	The role of the manager is to: drive economic development projects and initiatives; maintain links with State and Commonwealth Government agencies and other Councils; be the contact point for businesses in the region; manage relationships with potential investors in the region; facilitate investment and development projects through Council and other government approval processes; and prepare business cases and submissions.
Information	There is a need to have up to date information available. The economic development strategy document provides a base of information. This needs to be used in special content areas of the website; in publications and in submissions and business cases. There is a need to conduct a regular survey/consultation with businesses and to up -date information when it becomes available.

101 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P66
102 http://www.northerntasmania.org.au/ (NTD involves the 8 Councils in Northern Tasmania. involves: Break O'Day, Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar)

5.4 Sector Strategies

5.4.1 Sector Strategies - Overview

The economic development strategy has primary objectives of growing the region (through a larger population and a stronger tourism sector) to generate sustainable jobs (in key sectors including services). This growth needs to be supported through improvements in town centres and in economic and community infrastructure.

The key elements of the economic development strategy have major impacts on specific industry sectors in the region and at the same time require some supporting actions at an industry level to strengthen business and generate jobs.

The following provides an overview of strategies and actions that are required in each of the sectors to support the overall directions of the economic development strategy.

Key priorities are: maintaining and diversifying agribusiness (including value added processing); maintaining fishing activity, developing the port and further developing aquaculture; developing light industry linked to regional markets; redeveloping the tourism market; and maintaining the regional role of St Helens (in retail, business services, government funded services -health, education).

In most cases action at a sector level involves Council in ensuring a positive business environment (regulations, approval processes and infrastructure development). It also involves partnering with: government agencies to ensure that businesses are able to access relevant support programs; the Break O'Day Chamber on business issues and programs; the East Coast Regional Tourism Organisation of tourism development; and with other Councils on broader regional projects and initiatives.

Another key element is taking an evidence based/business case approach to representation on issues affecting business and population in the region. This strategy report provides a foundation of information on the local economy and industry. This data can be updated on a regular basis and be supplemented with a regular program of business surveys and consultations.

For some of these industry sectors (eg. agribusiness, forest products), Break O'Day Council needs to work in partnership with other Councils. This is because the size of the sector in Break O'Day is small compared with the scale of the industry in the broader region.

Summary - Sector Strategies

Resource Based Industries	
A. Agribusiness	**<Work with Industry and DEDTA>**
A.1 Maintain the sector	Maintain and develop major activities in the region (meat, dairy).
A.2 Diversify activity	Diversify - agribusiness in horticulture production: vines and viticulture (cool climate wines)[103]; nurseries and cut flowers; poppies; fruit (eg. berries, cherries, nuts and stone fruit).
A.3 Processing	Develop value added processing of specialist food products.
A.4 Farm gate sales	Food Trail: link activities as part of a regional food and wine trail and make them a focus of tourism promotion.
A.5 Regional approach	Take a broader approach to sector development in partnership with the Northern Region Councils (including Dorset).
A.6 Workforce	Develop a regional workforce strategy covering: a regional farm labour pool; develop of skills training for growers and for value added processing (vegetables, fruit, wine, cheese). [104]
B. Forest Products	**<Work with Industry >**
B.1 Adjusting to change	Major focus on adjusting to change situation (re-skilling displaced persons) and encouraging development of plantation timber.
C. Seafood	**<Work with Industry >**
C.1 Commercial Operations	Maintain St Helens as a commercial port for fishing activity and continue development of aquaculture operations.
C.2 Charter Operations	Extend fishing charter operations (including boat hire).
C.3 Recreational fishing	Continue to develop and promote the area as a recreational fishing hub.
C.4 Infrastructure	Develop port infrastructure: extend and develop the marina and the wharf area and maintain boat servicing capacity; develop breakwaters and dredge channels to keep Barway open..
D Mining	**<Work with Industry >**
D.1 Maximising local benefits	Maximise local benefits through a local workforce, contractors and suppliers.
Goods Producing Industries	
E. Manufacturing	**<Work with Industry and DEDTA >**
E.1 Developing the food sector	Food and Beverages: develop the local industry producing specialist gourmet products (national and export sales; and tourist sales).
E.2 Ensuring growth in light industrial activity	Light Industry: development is linked to future population size (regional) and industry mix (providing support to agribusiness, mining, fishing etc. Planning needs to ensure future industrial sites are available.
E.3 Developing local skills	Skills: a need to address skill issues for industry through regional industry workforce strategies and use of Trade Training Centre (St Helens).
F. Construction	**<Work with Industry and TasTAFE >**
F.1 Growth and future jobs	Business growth will be driven by future population growth and housing requirements in Break O'Day and Northern Region.
F.2 Developing workforce skills	Skills: a need to develop future skills and link businesses to regional training initiatives for building and construction trades (TasTAFE).
Service Industries	
G. Tourism	**<Work with Industry and ECRTO>**
G.1 Visitors	Build the market: boost visitor numbers (overnight and day) and increase off-season visits.
G.2 Market Segments	Develop specialist markets (eg. conferences, diving, and fishing).
G.3 Tourism Product	Develop product: link the coastal experience and activities - in food trails, cycling, walking trails, diving trails, golf trails, fishing experience; and develop other events for the region.
G.4 Diving	Assess business case for a diving wreck (HMAS Tobruk) as part of a regional diving trail.
G.5 Tourism Infrastructure	Improve infrastructure: address gaps in tourist infrastructure and services in the region including: accommodation options; cafes/ restaurants; port area; other facilities and attractions.
G.6 Town Centres	Improvements in town centres that will attract visitors and resident shopping.
G.7 Industry Skills	Skills: a need to implement training for employees and small businesses.
H. Retail	**<Work with Industry >**
H.1 Population and Retail Demand	Population size and structure and future growth will be important in maintaining a mixed and sustainable local retail sector. Returning to a growth path (via resident attraction) is important for the retail sector.
H.2 Servicing the visitor market	Tourism is important for retail businesses. Regional tourism strategy will impact on local retailers.
H.3 Planning retail precinct	Place is important: better planning of town centres and improvements will impact on retail activity and on the retail mix.
I. Business Services	**<Work with Industry >**
I.1 Business growth is required	Regional population/business growth will be important for sustaining a local business services sector.
I.2 St Helens as a regional business centre	St Helens will continue to be a major hub for business services firms that target the broader region.
I.3 A new centre for business	Servicing Broader Markets: Break O'Day is a good location to service other areas of an East Coast market. It is a good location for other specialist professionals seeking a lifestyle change, while still operating a business (eg. in consulting, technical services etc.)
I.4 Professional Workforce	Professionals: there is potential to attract professionals to the area and market Break O'Day as a lifestyle change location for businesses and professionals.
J. Government Services	**<Work with Industry and Government >**
J.1 Servicing a Regional Population	Population size and structure is important for the maintenance of services and any future expansion in local and regional service delivery. The population of Break O'Day is projected to grow in the longer term, particularly in coastal areas.
J.3 Regional Role	Servicing the region: Break O'Day performs a broader regional role in the delivery of health services (including primary care and some emergency services) and secondary education.
J.4 Professional workforce	Attracting professionals (health, business, and industry): is a major issue for many regional areas (including Break O'Day) .There is a need to develop a workforce attraction plan.
J.5 Funding of services	Future funding: a major issue for the region is future levels of government funding for health services and for other services delivered through local government. There is a need to ensure funding is maintained for regional services.

103 Potential for Growth of the Tasmanian Wine Sector - ....might it become the Pinot Isle?; Dr. Richard E Smart, Smart Viticulture and RuralSmart, Launceston 2010.
104 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

5.4.2 Resource Based Industries

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
A. Agribusiness	Sector: The East Coast has a diverse agribusiness covering sheep, beef cattle, dairy cattle, intensive agriculture (eg. poultry and feedlots), wine, fruit, vegetable, walnut, organic and boutique horticulture (eg. olive oil).[105] Production in Break O'Day was around $15 million in 2008 ($86 million in the adjacent Dorset LGA.) Major activities are livestock ($11 million) - cattle, milk and sheep and small holdings of horticulture (total $4 million). Situation: The activities in the region vary from commercial scale operations. Sector is under pressure from production costs. Employment has declined from 132 persons in 2001 to 109 persons in 2011. Opportunities: Maintain current activities; diversify into new areas (wine, fruit); develop value added processing; food trails; and work on regional industry issues.				
A.1 Maintain the sector	**Maintain - Major Activities** - Ensure that current major activities in the region are maintained (meat, dairy) and developed.				
Action A1	**Council to:** **-Have an active engagement with agribusinesses in the LGA.** **- Ensure that any proposed expansion of business operations are facilitated.** **-Take a regional approach to industry sector development in partnership with other Councils in the Northern Region.**	**S-M**	**1**	**BODC**	**DEDTA** **Northern Region Councils** **Agribusinesses**
A.2 Diversify activity	**Diversify - Agribusiness** There is potential for further development of horticulture production: - Vines and viticulture: major potential for development of premium cool climate wines in the East Coast Region.[106] White Sands Estate is developing major plantings of new vines. - Nurseries and cut flowers have potential in the region. - Poppies: processors are expanding and require increased production from growers (improved productivity and new plantings). - Fruit: there is the potential to develop fruit production (eg. berries, cherries, nuts and stone fruit). There has been major investment in the Northern Region in production of fruit (Driscoll's /Costa Group).				
Action A2	**Council to:** **- Work with DEDTA and the industry on identifying regional diversification opportunities.** **- Identify constraints to development and take action to resolve these (eg. zoning, land availability, workforce skills)**	**M-L**	**1**	**DEDTA**	**BODC** **Northern Region Councils** **Agribusinesses**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

105 Agricultural Profile Regional Summary of Northern Tasmanian Municipalities AK Consultants, December 2010
106 Potential for Growth of the Tasmanian Wine Sector - ....might it become the Pinot Isle?; Dr. Richard E Smart, Smart Viticulture and RuralSmart, Launceston 2010. Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) ; Regional Economic Development Plan: Northern Tasmania Wine Sub-sector Profile P148

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
A.3 Processing	<u>**Processing – Specialist Products**</u> -Major processing plants are in the north of the region. Break O'Day is unlikely to be considered for a major manufacturing plant. -Boutique processing operations exist in the LGA. There is potential to develop value-added operations in the area.				
Action A3 <& E1>	**Council to:** **-Work with DEDTA and the industry on identifying potential value adding food processing opportunities.** **- Ensure that zoning and regulations do not impede expansion of existing activities or new opportunities.**	**M**	**2**	**DEDTA**	**BODC** **Northern Region Councils** **Agribusinesses**
A.4 Farm gate sales	<u>**A Food Trail**</u> -The boutique processing operations are part of farm gate sales operations and have a significant tourism component to their sales (eg. Pyengana Dairy/Holy Cow Café; White Sands Estate; Eureka Farm). -There is the potential to link these activities as part of a regional food and wine trail and make them a focus of tourism promotion.				
Action A4 <& E1 >	**Council to:** **-Work with ECRTO and businesses to develop and promote a food trail and food events (eg. farmers market) in the region.**	**S-M**	**1**	**ECRTO**	**BODC** **Agribusinesses** **BOD Chamber (Tourism Group)**
A.5 Regional approach	<u>**A Broader Approach**</u> -There is a need to take a regional approach to development of agribusiness activity. This includes working together with the Northern Region Councils (include Dorset).				
Action A5	**Council to:** **-Work with Northern Region Councils and DEDTA on agribusiness development. This would cover:** **- Accessing government business development programs.** **- Ensuring that zoning maintains sufficient productive agricultural land.** **- Representing industry issues to government.**	**M**	**2**	**BODC**	**Northern Region Councils** **DEDTA**
A.6 Workforce	<u>**Developing Skills**</u> Workforce strategy -there is a need for Break O'Day to be involved with others in the Northern Region on the industry skill strategy covering: a regional farm labour pool; develop of skills training for growers and for value added processing (vegetables, fruit, wine, cheese). [107]				
Action A6	**Council to:** **- Work with Northern Region Councils , Skills Tasmania and businesses on developing and implementing a regional agribusiness workforce strategy.**	**M**	**1**	**BODC**	**Skills Tasmania** **DEDTA** **Northern Region Councils**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

107 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P65

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
B. Forest Products	Sector: Tasmanian forest products sector is an integrated industry that encompasses: both native forest and plantation resource (both softwood and hardwood); the production of logs, woodchips, hardwood and softwood sawn timber, speciality timbers; pulp and paper production; veneer; fuel wood and other wood products. Situation: The Tasmanian forest industry has experienced major change with an estimated 3500 jobs lost in the period from August 2008 to May 2011. This has resulted in significant social and economic impacts for the communities that are dependent on forestry.[108] Major impacts have been felt in Dorset LGA, with large scale forestry and processing operations. Break O'Day had a major fall in jobs between 2001 and 2011 (from 74 jobs to 14 jobs in forestry and logging). Opportunities: Maintain current operations in Break O'Day; developments in Dorset may create job opportunities for Break O'Day residents; and plantation timbers.				
B.1 Adjusting to change	**Adjusting to Industry Decline**. - Future forest products industry diversification and development will have more limited direct impacts on Break O'Day (other than some development of plantation timbers). - A major focus needs to continue to be on alternative employment opportunities in other sectors and re-skilling displaced persons.				
Action B1	**Council to:** **-Work with DEDTA, and Skills Tasmania and forest products businesses on alternative employment opportunities** **-Ensure that zoning and land use policies do not constrain the development of plantation timbers.**	**S-M**	**2**	**BODC**	**DEDTA** **Skills Tasmania** **Forest products businesses**
C. Seafood	Sector: The commercial sector in Break O'Day comprises a fishing fleet and aquaculture operations. Break O'Day is a major centre for recreational fishing and there are some fishing charter operations. Situation: The last 10-20 years have seen: a decline in the number of boats operating out of St Helens (fishing from 50 to 25 boats and lobster boats from 35 to 12 boats); and a growth in tourism related activity (recreational fishing and water based activities). Aquaculture has expanded over the last 10-15 years with the number of operators increasing, and with industry employment now at around 25 persons. Opportunities: Maintain fishing activity in the region; further develop aquaculture; develop charter and boating operations. There is a need to develop port infrastructure.				
C.1 Commercial Operations	**Maintain Activity** - Maintain St Helens as a commercial port for fishing activity (including Barway access and port facilities).[109] - Continued development of aquaculture operations, based on the Georges Bay Marine Farming Development Plan. - Extend fish loading and processing activity at St Helens. -There is a need to maintain and expand the sector.				
Action C1	**Council to:** **-Work with the local industry on developing the sector.** **- Ensure St Helens continues as a working port.** **- Ensure that sites are available for the expansion of aquaculture opportunities.**	**M**	**2**	**BODC**	**DEDTA, Tasmanian Rock Lobster Fishermen's Assoc., St Helens Gamefishing Club, fishing and aquaculture businesses**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

108 Community Wellbeing Needs Analysis December 2011 - Report to Rural Alive and Well (RAW) Fenner School of Environment and Society, Australian National University
109 Marine Infrastructure Development Project for St Helens: Picnic Point and Barway- Investment Analysis /Business Case, Burbury Consulting July 2013.

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-3)	Lead Agency	Partners
C.2 Charter Operations	**Charters** - Extend fishing charter operations (including boat hire). - Broaden charter offering to include leisure cruising, and bird and marine life viewing. <There is a need to develop the charter business.>				
Action C2	**Council to:** **-Work with the local industry on the development of the charter business (including boat hire).** **-Work with ECRTO and operators on marketing fishing charters as key regional attraction.** **- Work with the industry to develop other water- based tours for the tourist market.**	**S-M**	**1**	**BODC**	**Charter Operators ECRTO**
C.3 Recreational fishing	**Develop Recreational Fishing** - Continue to develop the fishing market and promote the area as a recreational fishing hub.				
Action C3	**Council to:** **-Work with ECRTO and the sector to market the region to the visitor market (local and interstate) as a recreational fishing destination.** **-This includes developing content for tourism websites.**	**S-M**	**2**	**ECRTO**	**BODC, St Helens Gamefishing Club, Charter Operators**
C.4 Infrastructure	**Develop Port Infrastructure** -Extend and develop the marina and the wharf area. -Ensure boat servicing capacity is maintained as part of an active commercial port operation. - Dredge the barway (and extend breakwaters) to provide access to the harbour. [110] - Develop facilities in Break O'Day as part of the broader regional infrastructure strategy. (Action 10.7 Develop an East Coast Marine Infrastructure Strategy in Northern Region Plan)[111] -Infrastructure needs to be developed in the port area and in other locations.				
Action C4	**Council to:** **- Extend marine infrastructure in St Helens Port.** **- Work with MaST and Northern Councils on implementing Break O'Day components of the Marine Infrastructure Strategy.**	**M-L**	**1**	**BODC**	**MaST Northern Councils**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

110 Marine Infrastructure Development Project for St Helens: Picnic Point and Barway- Investment Analysis /Business Case, Burbury Consulting July 2013.
111 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P114-115

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
D. Mining	Sector: Current mining activity in the Break O'Day Region is undertaken at the Cornwall Coal mines around Fingal and St Marys and the gold mines at Mathinna. Hardrock Coal is developing a new mine near Fingal. There are several quarry operations in the LGA. Situation: The sector is expanding. When the Hardrock Coal operations are at their peak, direct mining industry employment will increase from around 70 (at Cornwall Mines) to a total of around 260-280 persons. Opportunities: Expansion of operations and employment with Hard Rock Coal project.				
D.1 Maximising local benefits	**Local Benefits** -Benefits to Break O'Day will be maximised when employees are (or become) local residents, rather than fly in/ fly out or drive in/drive out workers. -The key benefits comprise an increase in population and the associated demand for services in St Marys, Fingal and other parts of the LGA. -Employment of locals has the potential to stabilise the population in the smaller centres, which have lost people due to the decline in forestry and agriculture. -There is a need to maximise local employment opportunities. -The expansion of mining will provide potential business for contractors, technicians and local engineering businesses in the region.				
Action D1	**Council to:** **- Work with mining companies and DEDTA to maximise local benefits (jobs for residents and activity for local suppliers and contractors) from mining expansion.**	**S-M**	**2**	**BODC**	**Mining Companies DEDTA**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

5.4.3 Goods Producing Industries

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
E. Manufacturing	Sector: Manufacturing in the region is primarily: small scale light industrial activity - engineering , machinery and equipment servicing for a regional market ; wood products (cabinets); and specialist food production (eg. Pyengana Dairy Company, Eureka Farm and White Sands Estate -wine and Iron House Brewery). Many of the light industrial businesses are located in the St Helens industrial estate. Situation: Manufacturing jobs represented 6% of jobs (100 jobs) in the LGA in 2011. Major sectors of employment were food products, mineral products, metal products and wood products (saw mill). Over the period since 2001 there have been changes in employment in the sector, with total sector employment increasing by 32 jobs. This comprises: a growth in jobs in food products, non-metallic mineral products, metal products and machinery and equipment; and declines in wood products (milling) , printing, and furniture manufacture. Opportunities: Population growth will generate a demand for light industrial activities; regional industry will generate a demand for engineering and other support service; there is potential to develop value added processing (food products and wine).				
E.1 Developing the food and beverage sector	**Food and Beverages** -Specialised food production has experienced growth in the region, based on the quality of local produce and a reputation for gourmet products (eg. Pyengana Dairy Company). -This sector is also linked to the visitor market and the potential to develop a food trail. -Significant potential has been identified for the development of cool climate wines and White Sands Estate is involved in large scale planting of vines. -The food/beverages sector needs to be further developed.				
Action E1 **<A3 & A4>**	**Council to:** **- Work with DEDTA and agribusinesses on developing new opportunities.** **- Ensure that expansion and development is not constrained by zoning and land use issues.**	**M**	**2**	**BODC**	**DEDTA** **Agribusinesses**
E.2 Ensuring growth in light industrial activity	**Light Industry** -Other segments of manufacturing are reliant on the size of the regional market. For consumer related products the size of the population (Break O'Day and adjacent LGAs) is the major driver. For industry servicing the business market (eg. mining, agribusiness, fishing, food processing and forestry), the scale of regional operations is the key driver of demand. - A major long term issue is ensuring there is adequate industrial land available – this needs to be part of Council planning.				
Action E2	**Council to:** **- Examine long-term requirements for industrial land, under various regional growth scenarios.** **- Ensure adequate industrial land is available in St Helens, Scamander and St Marys.** **- Review structure plans to provide for industrial land (with appropriate buffers from residential areas).**	**M-L**	**2**	**BODC**	**DEDTA** **BOD Chamber**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
E.3 Developing local skills	**Skills** Workforce recruitment, retention and the development of skills is an issue for the region. This covers the development of a skilled local workforce and key directions are: -Development of industry workforce strategies that cover the broader Northern Region (including agribusiness). -Use of the Trade Training Centre (St Helens) facilities for skills development (schools based apprenticeships, and workforce training programs).				
Action E3 <A6 & F2>	**Council to: - Work with Skills Tasmania; TasTAFE, DEDTA and Northern Councils on industry workforce strategies (covering agribusiness, manufacturing, and construction) and regional programs using the Trade Training Centre.**	**S-M**	**2**	**Skills Tasmania**	**BODC (Business Enterprise Centre) TasTAFE DEDTA Northern Councils BOD Chamber**
F. Construction	Sector: construction sector is mainly servicing a regional housing market (new houses, renovations and maintenance). Demand is affected by population size and growth and by new housing development in the region Situation: Construction jobs (94) represented 6% of jobs in the LGA in 2011. Major areas of employment were building and construction services (ie. electricians, plumbers and other trades); and other building professionals. Employment and activity was stable between 2006 and 2011. Opportunities: Population growth will drive future demand for services; and there is a need to develop trade skills.				
F.1 Growth and future jobs	**Growth** Businesses and jobs in the area will be driven by several factors: future population growth and housing requirements in Break O'Day and in the broader Northern Region; and non-housing development (commercial, health, age care, government etc.).				
F.2 Developing workforce skills	**Skills** -Workforce development and construction trade skills is a regional issue (young people entering the sector). - Businesses in the sector need to be linked to regional training initiatives for building and construction trades. - The Trade Training Centre (St Helens) can be used for schools programs, community programs and for retraining . - Break O'Day Council should establish links with TasTAFE to facilitate industry training for the region.				
Action F2	**Council to : - Work with TasTAFe and BOD Chamber to link local businesses to skills programs, including the industry use of the Trade Training Centre.**	**S-M**	**2**	**BODC (Business Enterprise Centre)**	**TasTAFE[112] Northern Councils BOD Chamber Construction Businesses**

112 From 1 July 2013 , VET courses will be delivered by a new organisation TasTAFE. (it will bring together the Polytechnic and the Tasmanian Skills Institute (TSI).

5.4.4 Service Industries

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
G. Tourism Sector	Sector: Major sector for region: $39 million annual visitor expenditure; 20% of businesses tourism dependent; and generates around 210 jobs. Tourist spending is currently around is around 2.5 times gross farm gate revenues from agriculture. Situation: A weakening in the market in the last 3 years. There has been a decline in visitors (overnight and day visitors) to Tasmania and to Break O'Day. Opportunities: Rebuild visitor market and develop niche markets – through product development and marketing.				
G.1 Visitors	**Building the Market** - Turn around the decline in visitor numbers to the region. - Capture more overnight visitor nights for persons travelling the coastal trails. -Extend the season - increase visitor numbers in the off-season periods.				
Action G1	**Council to:** **-Implement the Break O'Day Tourism Strategy.** **-Work with ECRTO on marketing activities to re-build the visitor market.**	**S-M**	**1**	**ECRTO**	**BODC** **BOD Chamber (Tourism Group)**
G.2 Market Segments	**Developing Specialist Markets** - Develop other market segments (eg. conferences, diving, fishing). - Improving market information directed at specialist markets.				
Action G2	**Council to:** **- Hold a workshop with ECRTO and the industry on market development and opportunities in specialist markets.** **- Prepare a market development plan with ECRTO for special markets.**	**S**	**1**	**ECRTO**	**BODC** **BOD Chamber (Tourism Group)** **Major tourism businesses**
G.3 Tourism Product	**Developing Product** .- Better linking of the coastal experience and activities - in food trails, cycling, walking trails, diving trails, golf trails, and fishing experiences. - Developing other events for the region (including St Marys and St Helens). - Review potential to develop motoring museum in St Marys.				
Action G3	**Council to:** **- Partner with ECRTO and the industry on new tourism products. This includes: - Developing marketing concepts and material that better links the visitor experience in trails.** **- Identifying potential events that could be developed for the region.**	**S-M**	**1**	**ECRTO**	**BODC** **BOD Chamber** **Major tourism businesses**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
G.4 Diving	<u>**Diving**</u> - Acquiring a diving wreck (HMAS Tobruk) for the region and developing a regional diving trail.				
Action G4	**Council to:** **- Examine the regional tourism business case for securing the ship.**	**M**	**2**	**BODC**	**BOD** **Chamber** **ECRTO**
G.5 Tourism Infrastructure	<u>Improving Infrastructure</u> - Addressing gaps in tourist infrastructure and services in the region including: accommodation options; cafes and restaurants; port area; other facilities and attractions. -Improving tourist signage in the region.				
Action G5	**Council to:** **- Work with ECTRO and tourism businesses to improve regional tourist infrastructure in key locations.** **- Improve tourist signage in the area to direct visitors to major locations, including Bay of Fires.**	**M**	**1**	**BODC**	**ECRTO** **BOD** **Chamber (Tourism Group)** **Major tourism businesses** **DEDTA**
G.6 Town Centres	<u>**Town Centres**</u> St Helens -improvements to make St Helens more attractive for visitors: waterfront area/boardwalk; access to marina and port area; café options on the water; and bike track access. St Marys - improvements in main street area to encourage stops and stays.				
Action G6 **< & H3>**	**Council to:** **-Specify required town centre improvements in the St Helens and Surrounds Structure Plan.** **-Specify required town centre improvements in the St Marys Structure Plan.**	**M** **< part of town strategies>**	**2**	**BODC**	**BOD** **Chamber** **MaST** **DEDTA**
G.7 Industry Skills	As a service industry workforce quality and skills are important for a competitive tourist sector. There is as need to implement training for employees and small business.				
Action G7	**Council to:** **- Work ECTRO and the tourism sector on workforce development and skills. This includes:** **- Linking local businesses to the *Tasmanian Hospitality Skills Program.*** **- Digital skills - develop skills through accessing a *Digital Ready Program* targeted to regional tourist operators.**	**S-M**	**1**	**ECRTO**	**BODC** **BOD** **Chamber (Tourism Group)** **Skills Tasmania** **DEDTA**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
H. Retail	Sector: Retail is one of the major sectors of employment (retail jobs 225, represent 13% of jobs) in the LGA . The sector is driven by the size of the local market (population size and growth) and competition from other retailers (eg. major retailers in Launceston/Hobart and the growth of online shopping). As a tourist area, retail sales is also dependent on activity during the peak holiday periods (eg. the number of overnight visitors and day visitor Situation: The economic slowdown has impacted on the level of retail expenditure. There has been a shakeout in businesses that may have been marginal and this is reflected in an increased number of vacant shops. Opportunities: Major opportunities are linked to a return to population growth and improvements in the town centres.				
H.1 Population and Retail Demand	**Population** - Population size and structure and future growth will be important in maintaining a mixed and sustainable local retail sector. -The contraction in local jobs has affected the population size with residents moving out. - Relative to major centres in Tasmania, Break O'Day has a significant number of lower income households (receiving pensions or in lower paid jobs). **Future Growth** -Longer term projections are for growth in population, particularly in the coastal areas and in St Helens. -Returning to a growth trajectory (via resident attraction) is important generating growth in the retail sector.				
Action H1	**Council to:** **- Work with regional stakeholders regional on population growth initiatives including:** **-Improving planning approval processes for housing development.** **- Promoting Break O'Day as a place to live.**	**S-M**	**1**	**BODC**	**BOD Chamber** **DEDTA**
H.2 Servicing the visitor market	**Tourism Demand** -As a tourist area an important part of retail sales is driven by visitors (especially St Helens). -The decline in visitor numbers over the last 3 years has impacted on retailers. -Retailers will benefit from tourism initiatives and marketing which leads to an increase in visitor numbers (both overnight stays and day visitors). -Implementation of the new regional tourism strategy is important for retailers.				
Action H2	**Council to:** **-Work with ECRTO and BOD Chamber on implementation of the new regional tourism strategy to ensure benefits for local retailers.** **-Work with BOD Chamber and retail businesses on opening hours to service the tourist market.**	**S-M**	**1**	**ECRTC**	**BODC** **BOD Chamber**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
H.3 Planning retail precinct	**Place is Important** -Better planning of town centres can have a positive impact on retail activity and on the retail mix. -An attractive retail precinct attracts residents, holiday visitors and regional visitors. -Town centre improvements will be important for the retail sector in both St Helens and St Marys.				
Action H3 < & G6>	**Council to:** **-Specify required town Centre improvements in the St Helens and St Marys Structure Plans.** **-Commence on initiatives to improve retail precincts.**	**M < part of town strategies>**	**2**	**BODC**	**BOD Chamber DEDTA**
I. Business services	Sector: The total number of business services jobs in the LGA have remained fairly constant (around 100 jobs) over the last 10 years. The major sectors were: real estate and property services (32 jobs); professional and technical services (37); and financial services (22). Most of these jobs are located in the major coastal centre - St Helens Situation: Business services businesses are covering local and regional markets. Demand is driven by population size and by the number of businesses in the area Opportunities: prospects for business services will depend on: population size and growth; the business mix in the area; the strength of business activity; and the ability to attract business professionals.				
I.1 Business growth is required	**Business Growth** The size and scale of regional business is a major driver of the demand for business services. - Regional business growth will be important for sustaining a local business services sector. - Growth in the tourism sector will have impacts on local and regional demand for business services.				
I.2 St Helens as a regional business centre	**Servicing Region Markets** - As the major population centre on the East Coast, St Helens will continue to be a major hub for business services firms. - Any future decline in industry activity would have negative impacts on business services firms in the area. - St Helens and other locations have advantage as a lifestyle location for service businesses and professionals (airport access, regional markets, NBN).				
Action I3	**Council to:** **-To ensure that St Helens' regional service role is maintained.** **- Work with DEDTA and BOD Chamber on developing the service market.**	**M-L**	**1**	**BODC**	**DEDTA BOD Chamber**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
I.4 Professional Workforce	<u>**Attracting Professionals**</u> -There is potential to attract business people to the area and to market Break O'Day as a lifestyle change location for businesses and professionals. Council to encourage development of <u>home based</u> businesses.				
Action I4	**Council to:** **-Promote Break O'Day as a lifestyle change location for businesses and professionals.** **-Encourage home-based businesses and ensure that they are able to access business development services (via the Business Enterprise Centre).**	**M-L**	**1**	**BODC**	**DEDTA** **BOD Chamber**
J. Government Funded Services	<u>Sector:</u> Covers health services, education services and local government services. These are substantially funded by government (including local rates); and in most cases are delivered through public sector agencies (however some part of the health sector and education sector comprises private providers- doctors clinics, private hospitals , nursing homes, schools etc.). Break O'Day, because of its location and the isolation of the parts of the East Coast, plays a regional role, particularly in health services provision (with hospitals at St Helens and St Marys). Government funded services accounted for 493 jobs in 2011. These sectors are major employers of a women (363 or 74% of these jobs are held by females) and represented 27% of total jobs in the region in 2011 <u>Situation:</u> Over the last 10 years, the number of jobs in these sectors increased by 148 from 345 in 2001 to 493 in 2011. The major growth was in preschool and school education (41 jobs); public administration (34 jobs); residential care services (20 jobs); and medical and other health care services (17 jobs). <u>Opportunities:</u> Future provision depends on population size, government funding and decisions on delivery of regional services. Factors: the size, age and family structure of the regional population and its impacts on service demand; the continued level of government funding for services; and decisions on the service delivery models.				
J.1 Servicing a Regional Population	<u>**Population**</u> - Population size and structure is important for the maintenance of services and any future expansion. Over the last 5 years population growth has slowed . - An ageing population has particular services demand - health services and aged care services (including residential aged care and home based care). - A declining population can lead to a scale back in services or changes to the point of delivery (eg. education provision or health services). -The population of Break O'Day is projected to grow in the longer term, particularly in coastal areas.				
Action J1 **<& H1>**	**Council to:** **- Implement initiatives to increase population , including: a resident attraction program; promotion of Break O'Day as a place to live.**	**S-M**	**1**	**BODC**	**BOD Chamber** **DEDTA**
J.2 Regional Role	<u>**Regional Role**</u> -Due to isolation issues on the East Coast, Break O'Day performs a broader regional role in the delivery of health services (including primary care/acute care and some emergency services) and secondary education. - The regional service role needs to be maintained.				
Action J2	**Council to:** **- Partner with service providers in further developing the regional service role.**	**S-M**	**1**	**BODC**	**BOD Chamber** **Service Providers**

Issue	Direction/Actions	Timeframe S/M/L	Priority (1-2)	Lead Agency	Partners
J.3 Professional workforce	**<u>Attracting Professionals</u>** -Government services generally employ professionals and para-professionals. - A major issue for many regional areas (including Break O'Day) is the ability to attract professionals to take up available jobs. - In health this covers doctors and dentist and specialist allied health providers . - There are also issues in attracting other professionals (eg. engineers, town planners, accountants, lawyers etc.). -There is a need to develop a workforce attraction plan.				
Action J3	**Council to:** **- Implement a workforce attraction program in partnership with service providers and employment agencies.**	**S-M**	**1**	**BODC**	**Service Providers** **Employment agencies**
J.4 Funding of services	**<u>Future Funding</u>** - A major issue for the region is future levels of government funding for health services and for other services delivered through local government. - With tight government budgets (national and state) reductions in grants and programs can impact on service delivery in regional areas (and associated jobs).				
Action J4	**Council to:** **- Actively engage with the State Government to maintain funding and regional service delivery.**	**S-M**	**1**	**BODC**	**Service Providers** **BOD Chamber**

Priority: 1= Major Priority 2= Priority; Time Frame: S=1-2 years; M=3-5 years; L=5 Years +

6. Implementing the Strategy

6.1 Overview - Implementation.

In summary, the economic development strategy needs to be focused on: increasing the regional population; diversifying the industry base; developing the tourism market; and increasing the number of local jobs. This requires a broader regional approach (to economic development, business attraction and tourism).

The economic strategy has a long term horizon of 15years. However it also needs to address short term and medium issues to provide a foundation for long term sustainable growth. The key objectives and actions are focused on:

- Growing the region: through encouraging sustainable population growth in the LGA.
- Generating ongoing sustainable jobs: through growing the economy; building on existing industries; and encouraging new activities.
- Building skills and a productive workforce.
- Reinforcing the strategic role of St Helens as a regional service centre.
- Improving liveability of the towns and villages: through recognising the importance of place; and improving infrastructure and connectivity (through planning and investment).

These are consistent with the goals of the broader regional plan for the Northern Region prepared by Department of Economic Development, Tourism and the Arts (DEDTA).[113] The actions will have specific impacts on key industries and these are summarised below.

Strategies and Industry Impacts		Agribusiness	Seafood	Mining	Forestry	Manufacturing	Construction	Tourism	Retail	Business Services	Govt . Funded Services
1.Growing the Region											
1.1 Growing the population	**<Major Priority>**					▲	▲▲		▲▲	▲	▲▲
2.Generating ongoing sustainable jobs											
2.1 Strengthening regional industries	**< Priority>**	▲▲	▲▲		▲	▲		▲▲			
2.2 Attracting new businesses	**< Priority>**	▲						▲	▲	▲	
2.3 Develop regional tourism	**<Major Priority>**	▲						▲▲	▲▲	▲	
3.Building skills and a productive workforce											
3.1 Developing workforce skills	**< Priority>**	▲▲					▲▲	▲▲	▲		
3.2 Developing small business skills	**< Priority>**	▲						▲▲	▲	▲	
4.Pursuing a Regional Approach											
4.1 Taking a broader regional economy/markets approach	**<Major Priority>**	▲▲				▲▲	▲▲	▲▲	▲	▲▲	
4.2 Developing St Helens as a service centre	**<Major Priority>**								▲▲	▲▲	▲▲
5.Improving liveability of the towns and villages											
5.1. Recognising the importance of place	**<Major Priority>**							▲▲	▲▲		
5.2 Improving infrastructure	**<Major Priority>**		▲▲			▲	▲	▲▲	▲▲		
6. Taking an active approach to economic development											
6.1 Facilitating economic development	**<Major Priority>**	▲	▲	▲		▲		▲▲	▲	▲	
6.2 Regional and industry information	**< Priority>**	▲▲						▲▲	▲▲	▲	

<Note: ▲▲ = major impacts; ▲ = impact>

113 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P112

6.2 Priorities and Timing

The economic development strategy has a horizon of 15 years to 2028. There are immediate priorities for action by Council in both the short term and medium term to get the region back on a growth path and to provide the foundations for long tern sustainable development of the LGA.

The following are key short term and medium term priorities for the implementation of the strategy.[114]

Implementation Priorities	Actions	Timing
Short Term	**2013-2015**	
Population		
Population Growth (1.1)	Resident attraction program – develop and implement a regional program (with a focus on Break O'Day).	Develop 2013 Implement 2014-15
Promoting Place (1.2)	Develop a place brand for Break O'Day.	Develop 2013
Business and Jobs		
Tourism (2.3)	Develop the market through targeting marketing and product development. Develop and promote regional trails and experiences.	Develop 2013 Implement 2014-2015
Industry development - strengthen regional industries (2.1)	Develop links with key businesses. Ensure local businesses can access industry support.	2013 - onwards
Industry development - diversification (2.1)	Facilitate industry diversification projects. Ensure local businesses can access industry programs. Attract businesses and investment.	2013-2015
Workforce (3.1)	Develop a regional workforce strategy covering key industry sectors (agribusiness, tourism, construction, services). Ensure businesses can access to training programs .	Develop 2013 Implement 2013-2014
Council		
Council and Economic Development (6.1)	Take a proactive approach to economic development. Strengthen links with government agencies. Improve planning processes. Active facilitation of development projects.	2013-onwards
Structures (6.1)	Establish Economic Development Committee and create Economic Development Manager Position.	2013
Information (6.2)	Utilise the information in the economic strategy. -Develop a regional prospectus and a business content area of Council website. -Develop a template for business cases and submissions. Conduct an annual survey/consultations with businesses. Prepare an annual economic report on the regional economy and strategy progress. Update information in strategy every 2 years.	Information and prospectus 2013 Survey 2014 Annual Report mid-2014-onwards Update end 2014
Medium Term	**2015-2018**	
Planning and Investment		
Town Centres (5.1)	Implement structure plans for key centres - St Helens and St Marys. Ensure planning allows for future development of retail, commercial and light industries sites.	2015 - onwards
Improve infrastructure (5.2)	Improve town infrastructure - St Helens and St Marys. Secure funding for infrastructure.	2015 - onwards
Improve infrastructure (5.2)	Develop coastal infrastructure (St Helens and Bays/precincts).	2015 - onwards
Review of Progress		
Review Economic Development Strategy	Review of strategy and progress on implementation (every 2 years)	Mid 2015-first review

114 As a second stage the strategy will be mapped against potential funding available from government programs. With the current expenditure cuts by the Australian Government and in State budgets, there is likely to be changes to programs and to funding levels.

6.3 Branding and Information

6.3.1 A Place Brand

A place brand would capture the key assets of the region and be used to promote Break O'Day.

There is a need to develop a place brand (1.2) to be used in promoting Break O'Day as a place for living, for working , for business and to visit. This is identified as a major priority.
The brand identity would be used in promotion of Break O'Day for tourism and for economic development. It would be utilised on place signage, in promotional material and on the tourism and business content areas of websites.

Development of a new brand would require detailed analysis and design work covering identity development, brand language and website design and content. This would require commissioning a project to develop and design a place brand.

6.3.2 Regional and Industry Information

This economic development strategy report provides a range of information on the local economy and business in the region that can be utilised in promoting the region and in preparing submissions and other documents. This information is a resource for Council and for businesses in the region. There are several other tools that need to be developed (6.2) and these are:

- A regional prospectus document which can be used for resident and business attraction (available in print and as a download from the Council website).
- Development of a business/economic development content area of the Council website.
- Improvements in the tourism content area of the website.
- An annual report on the regional economy and progress on the strategy.
- An annual survey/consultation with businesses in region (covering state of the local economy and key business issues).
- Develop of templates for business cases and submissions.

In seeking to attract business and residents in what is a highly competitive environment, Break O'Day needs to present its case with clear information.

6.4 Council Structures

A major priority is structuring Council to pursue an active approach to economic development (6.1). This involves both policies and processes (planning and facilitation major projects) and structures (establishing Economic Development Committee and creating Economic Development Manager Position).

6.5 Partnering

Council cannot implement the strategy on its own. It requires partnerships with local business through the Chamber of Commerce and regional level cooperation with adjacent Councils.[115]

There is a need for strategic support for programs from the Tasmanian Government and this involves a combination of: securing funding for local programs and initiatives; ensuring local businesses can access programs; and partnering with government agencies on industry and business development programs. There is also a need to secure funding contributions for strategic projects.

Workforce and skills programs need to involve local businesses, employment service providers and government agencies (Skills Tasmania; TasTAFE).

115 This is the case because in some sectors, Break O'Day only has a small share of the total regional industry.

6.6 Tracking Performance

There is a need to keep the economic development strategy up to date in terms of: new data and information becoming available; and progress being made on implementation.

- Information in the full strategy document should be updated every 2 years.
- Other local area information and indicators should be kept up to data as it is released (eg. unemployment estimates - monthly; and population data - annually).
- The annual report outlined in 6.3.2 would utilise the latest available data.

In pursuing regional and business opportunities, it is important that Council and its partners are utilising the latest available information and know how the region is tracking.

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Appendix A: Consultations

Sector	Position	Location	Issues
St Marys			
Art Studio and Gallery	Owner	St Marys	Development of St Marys
Museum	Operators	St Marys	Museum and tourist visitors
St Helens			
Workshop - Break O'Day Chamber and Community (14)	Business Owners Residents	St Helens	Regional development issues
Accommodation	Owner	St Helens	Visitor market and events
Hospitality	Owners	St Helens	Tourism trends and small business issues
Fishing retail	Owner	St Helens	Fishing sector and visitor market
Fishing Commercial	CEO	St Helens	Fishing industry issues
Business Services	Chamber of Commerce	St Helens	Tourism and retail issues
Business Services	Consultant	St Helens	Economic development and industry issues
Real Estate	Owner	St Helens	Visitor market, demographics and property market
Retail Services	Chamber of Commerce	St Helens	Economic development issues
Employment agency	Manager	St Helens	Employment and skills issues
Aged care	CEO	St Helens	Aged care and future demographics
Other Locations			
Agribusiness	Owner	Falmouth	Agribusiness and viticulture opportunities
Accommodation/Beverages	General Manager	Ironhouse Point	Visitor market , wine and beverages market
Dairy Products /Cafe	Owner	Pyengana	Dairy industry and visitor market
Dive business (Tobruk sinking)	Owner	Binalong Bay	Diving tours and economic development

Appendix B: St Marys Issues

B.1 Regional Economy

The town of St Marys operates as a small service centre for the local population. This is reflected in: local retail businesses servicing a local market and the rural area; hospital and health service that services a regional market; and a limited number of local jobs in the area, mainly in retail and health and education. There are few businesses outside of retail (mainly building and construction tradespersons).

The visitor market mainly comprises campers, persons staying at B&Bs and persons travelling through to the coast. For residents, the area offers affordable housing options relative to housing prices in coastal locations

B.2 Employment

Reflecting the age structure, the labour force participation rate of males is below that for other locations in Break O Day.

A total of 230 residents of St Marys were in employment in 2011. There was a clear division of labour on a gender basis. Employed males were concentrated in several sectors: agriculture and forestry (15%); mining (15%), government (13%), construction (12%) and manufacturing (8%). Females were concentrated in: health care and social assistance (32%); education (14%), government (14%), retail (13%) and accommodation and food services (13%).

Industry - the only current growth is in mining activity: mining is expanding with the development of Hardrock Coal's operations near Fingal. When the Hardrock operations are at their peak, direct mining industry employment will increase from the current 70 (at Cornwall Mines) to a total of around 260-280 persons.

Table 76. Employed Residents St Marys 2011

Employed Residents 2011						
	Males		Females		Persons	
St Marys Suburb (Broader Area)	No	Share %	No	Share %	No	Share %
Agriculture, forestry and fishing	**16**	**14.5**	3	2.5	19	8.3
Mining	**16**	**14.5**	3	2.5	19	8.3
Manufacturing	9	8.2	0	0.0	9	3.9
Electricity, gas, water and waste services	9	8.2	3	2.5	12	5.2
Construction	**13**	**11.8**	0	0.0	13	5.7
Wholesale trade	0	0.0	0	0.0	0	0.0
Retail trade	4	3.6	**16**	**13.3**	20	8.7
Accommodation and food services	8	7.3	**16**	**13.3**	24	10.4
Transport, postal and warehousing	0	0.0	0	0.0	0	0.0
Information media and telecommunications	0	0.0	0	0.0	0	0.0
Financial and insurance services	0	0.0	4	3.3	4	1.7
Rental, hiring and real estate services	0	0.0	0	0.0	0	0.0
Professional, scientific and technical services	3	2.7	3	2.5	6	2.6
Administrative and support services	0	0.0	0	0.0	0	0.0
Public administration and safety	**14**	**12.7**	**17**	**14.2**	31	13.5
Education and training	8	7.3	**17**	**14.2**	25	10.9
Health care and social assistance	3	2.7	**38**	**31.7**	41	17.8
Arts and recreation services	0	0.0	0	0.0	0	0.0
Other services	0	0.0	0	0.0	0	0.0
Inadequately described/Not stated	7	6.4	0	0.0	7	3.0
Total	**110**	**100.0**	**120**	**100.0**	**230**	**100**

Source: ABS Census 2011 - Resident Population Data

B.3 Future of the Area

The future of the area is dependent on population growth and increasing visitor numbers.

- Population: the area offers affordable housing in a rural environment. There is a need to arrest the population decline and this is dependent on local jobs and business opportunities.
- Development of the visitor market requires a number of components and several local concepts have been suggested by local business people.
    - Building on the car heritage, with the proposal for the development of a car museum on the site adjacent to the museum.
    - Development of a history trail: linking the mining and rail heritage with a walking track and cycle track between Fingal station and St Marys station (museum). This requires a restoration of the Fingal station building. The concept includes sculptures that link rail and mining history.
    - National parks -linking of reserves and improvements in walking tracks.
    - An increase in visitor numbers will provide a boost to local cafes.

Some key issues for the town are:

- Population - stabilising population and encouraging growth of the population in the area.
- Young people - offering education and training opportunities for young people (eg. trades training at the St Helens Trade Training Centre). The centre is designed for programs in construction, electrical, automotive, agriculture and cookery and hospitality.
- Developing infrastructure to attract visitors - museum, car museum, rail trail and national park trails.
- Improvements in the town centre to enrich its village atmosphere.

Appendix C: St Helens Issues

C.1 Regional Economy

The town of St Helens is the major regional service centre for Break O'Day and for the broader East Coast area. The regional economy comprise retail, food service, accommodation, health, community services, business services and sea food (including an expanding aquaculture sector).

It has an industrial estate which is occupied by a saw mill, light industrial businesses and warehousing and storage.

St Helens is a major centre for the tourist market, with the population growing during the summer season. St Helens and the coastal areas have experience ongoing population growth with older person retiring in the area.

C.2 Employment

St Helens is the major centre for jobs (928) in the LGA and accounts for 55% of jobs in the LGA. In all 66% of jobs are in-person services jobs (615) and 8% were business services jobs (77). Goods producing industries accounted for 16% of jobs (153)

Table 77. Jobs in St Helens 2011

St Helens - Job Estimates	Jobs 2011	
Industry	Persons No	Share %
Goods Producing		
Agriculture, forestry and fishing	10	1.1
Mining		0.0
Manufacturing	80	8.6
Electricity, gas, water and waste services	23	2.5
Construction	40	4.3
Total Goods Producing	**153**	**16.5**
Goods Related Services		0.0
Wholesale trade	25	2.7
Transport, postal and warehousing	50	5.4
Total	**75**	**8.1**
In Person Services		
Retail trade	140	15.1
Accommodation and food services	100	10.8
Education and training	85	9.2
Health care and social assistance	150	16.2
Administrative and support services	16	1.7
Public administration and safety	100	10.8
Arts and recreation services	14	1.5
Other services	10	1.1
Total	**615**	**66.3**
Business Services		0.0
Financial and insurance services	18	1.9
Rental, hiring and real estate services	28	3.0
Professional, scientific and technical services	25	2.7
Information media and telecommunications	6	0.6
Total	**77**	**8.3**
Inadequately described/Not stated	8	0.9
Total All	**928**	**100.0**
Share of LGA Jobs (%)	**55.2**	

C.3 Future of the Area

The future of the area is dependent on population growth and increasing visitor numbers.

- Population: the area offers housing options in a coastal environment, with access to a full range of services. There is a need to ensure that population growth continues and this is dependent on a combination attracting retirees and generating new local jobs and business opportunities (to retain and attract families).
- Visitor market: there is a need to arrest the decline in visitors, which has been impacting on local service businesses. Expanding the market requires an active approach to product development and marketing, which is detailed in this strategy report.

Some key issues that were raised in consultations were:

- Population - a need to encourage continued growth of the population in the area.
- Jobs in the area - growth is required in local jobs if families are to be retained in the area.
- Young people - a need to offer education and training opportunities for young people (eg. trades training at the St Helens Trade Training Centre) and employment.
- Improving town infrastructure and the developing the port area as a hub for visitors.
- Better linking attractions in the area as visitor "trails".
- Improving directional signage to major attractions.
- Developing a better service culture in retail and service businesses.
- Creating more events to bring visitors in in off peak periods.
- Council having more active engagement with businesses in the area.
- Taking a more proactive approach to economic development and encouraging investment in the area.
- Fast tracking development approvals for housing and other facilities to speed up investment.

Appendix D: Agriculture Sector Outlooks - Northern Region

D1 Meat

Sector	Direction/Actions
Meat	
Tasmania Sector: Farms	The red meat industry (beef and sheep meat) comprises around 3000 farms carrying a total of about 446, 000 beef cattle, and around 1800 farms carrying a total of about 1.9 million sheep (2010). [116] The industry contributes approximately $147 million towards Gross State Product and in 2011 beef exports totalled $112 million. The Australian domestic market consumes 33% of total Tasmanian production. In 2010-11 the Northern Region's contribution was $39 million (26%).
Tasmania Sector: Processors	Processing is dominated by two large businesses - JBS Australia and Greenham Tasmania (around 90% of processing. Another processor - Tasmanian Quality Meats focuses on sheep processing and is currently upgrading its Cressy plant (export product).
Development	Opportunities: Future development is linked to development of branded premium product and export markets. Constraints: succession planning for farmers; and potential higher returns from dairy, poppies and vegetables.

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

D2 Dairy

Sector	Direction/Actions
Dairy	
Tasmania Sector: Farms	Dairying is Tasmania's largest agricultural sector, with annual production of around $460 million in processed products. Farm operations and associated processing industry contribute an estimated $250 million Gross State Product.[117] Tasmania's temperate climate, fertile soils and reliable rainfall support low cost, pasture-based milk production.
Tasmania Sector: Processors	The state produces a range of dairy products for domestic and international markets including cheese, UHT milk, skim and whole milk powder, butter, whey, yoghurt, milk, confectionery and cream. Large scale processing is located in the north west and is dominated by Fonterra, Lion, Cadbury and Murray Goulburn. Northern Region: processors tend to be small specialist producers : Ashgrove Cheese - Elizabeth Town ; Meander Valley Dairy - Hillwood ; Elgaar Farm - Elizabeth Town ; Pyengana Dairy - Pyengana ; Tamar Valley Dairy - Launceston ; Yondover Farm House Cheese - Lebrina ; and Westhaven Dairy – Legana.
Development	Opportunities: the demand for milk demand by the main Tasmanian processors will increase by 40% over the next 5 years (increase of 350 megalitres (ML) to 1150 ML). There is a need to increase production in a sustainable manner to meet demand (more farm operators and a farm labour force. DairyTas, has a plan to help the industry with these growth opportunities.[118] Investment in by major processors will drive the dairy expansion in the Northern Region
Recent Investment	Investment by processors in the north west will likely be a driver for dairy expansion in the northern region. Projects include: Fonterra - $12 million upgrade of its Wynyard cheese plant; Lion - $150 million at Burnie and King Island specialty cheese plants; and Tasmanian Dairy Products (Murray Goulburn joint venture) $70 million milk powder plant at Circular Head. [119]

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

116 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P139
117 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P139
118 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P131
119 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) P131

D3 Vegetables

Sector	Direction/Actions
Vegetables	
Tasmania Sector: Farms	Tasmania has a number of advantages in vegetable production - cool temperate climate, quality soils and reliable irrigation. Production is mainly centred in the north and north west of Tasmania, with some activity also in the midlands . The vegetable industry contributes approximately $191 million towards Gross State Product. Key vegetables produced in Tasmania are potatoes(major crop), onions, carrots and peas. There are a large number of small growers and a small number of large growers. Larger operators are expanding through acquisitions and land leasing.
Processing	The vegetable industry is made up of fresh (segment is expanding), packed and processed sectors. Around 56% of vegetables grown are for processing. The major processors are Simplot and McCains: Simplot Australia has a vegetable processing plant in Devonport and potato processing at Ulverstone; and McCain Foods has a potato processing facility at Smithton. Vegetables are sourced from a variety of Tasmanian regions. The frozen vegetable industry is being subjected to increasing competition from imported products.

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

D4 Wine

Sector	Direction/Actions
Wine	
Tasmania Sector	Tasmanian wine industry is a relatively small, but high value. Tasmania has approximately 1% of Australia's vineyard area and produces less than 0.5 per cent of Australia's wine. Despite its size, Tasmanian wine represents some 6 - 7 % of sales in the premium and super premium wine categories. The sector employs around 1000 persons in Tasmania and is around a $75 million industry. Sales are : 40% interstate,, 8% overseas and balance of 52% local consumption.
Opportunities	A recent study has examined the potential to develop a cold climate wine industry based on the development model of the New Zealand industry (Sauvignon Blanc in Marlborough. Areas with microclimates similar to Marlborough are located at Launceston, St Helens and Bicheno.[120] White Sands is making a major investment in planting of vines as part of its winery development. Tasmania has a growing reputation for the production of premium cool-climate wines
Development	Significant investment in the industry is likely to involve national and international investors.

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

120 Potential for Growth of the Tasmanian Wine Sector - ....might it become the Pinot Isle?; Dr. Richard E Smart, Smart Viticulture and RuralSmart, Launceston 2010.

D5 Fruit

Sector	Direction/Actions
Fruit	
Tasmania Sector: Farms	The fruit industry comprises three key sub sectors: pome fruit - primarily apples, with some pears produced ; stone fruit - primarily cherries and apricots, with some nectarines and plums produced ; and berries - strawberries, raspberries, blackcurrants and blueberries. [121] The temperate climate provides a long mild growing season, and provides counter seasonal supply opportunities to the northern hemisphere markets .
Tasmania Sector: Processors	Fruit processing sector is small, with most being micro or small operations (predominantly making preserves and jams) servicing niche markets. There is only one major processor of apples, blackcurrants and raspberries for fruit juice and value added products
Pome Fruit	
Production	The pome fruit sub sector is had a 2008-09 farm-gate value of $37 million. In 2009-10 apples had a gross value of $26.4 m down $8.8 m from previous year (due to exchange rate impacts on exports). The Tamar Valley produces about 7% of the state's apple production. Major northern producers of pome fruit are: Top Qual Pty Ltd - Tamar Valley - apples, pears, cherries; Montague Fresh, Legana - apples, pears ; CG Miller Hillwood - apples, pears ; Windara Orchard, Sidmouth - apples, pears ; Lees Orchard, Dilston - apples, pears ; and Eureka Farm, Scamander – stone fruits, pomme fruits, berries, nuts and production of sauces, chutneys , jams etc.(within Break O Day LGA).
Development	Apples - opportunities exist in export markets in South East Asia and China has been identified as a developing market .
Stone Fruit	
Tasmania Sector: Farms	Tasmania has a relatively small stone fruit production area. Significant growth, particularly in apricots, has occurred in recent years. The focus has been predominantly on supplying the domestic market but as volumes increase there is potential for exports. 2008-09 farm gate values were: cherries $24 million; apricots $5.6 million ; other stone fruit (excluding cherries) $1.2 million. The sector is concentrated around the Tamar Valley in the northern region. Major northern producers of stone fruit are: Mountain View Cherries, Beaconsfield ; Eversley Cherries, Legana ; Woodmere Cherries, Swan Bay ; Fermer Cherries, Westbury ; Somercotes Cherries, Ross ; Underwood Cherry Farm, Underwood ; Aviemore Cherries, Gravelly Beach ; Cherry Top, Lilydale ; Pan Tas, Rowella ; and TE & AG Taylor, Beauty Point .
Development	The cherry sector is a rapidly expanding sector. The industry has estimated that by 2015, Tasmania would become the largest cherry producing state in Australia. Tasmania's niche for cherries is at the top end of premium overseas markets, based on quality and larger fruit size. Climate change may see new market opportunities, with climatic conditions seeing the production of stone fruit moving further south.
Berries	
Tasmania Sector: Farms	The sector is developing in Tasmania (only 2% of Australia's berry production). The Tamar area has a concentration of producers in the Northern Region. Raspberries and strawberries comprise 60 % of production Blackcurrants are the main berry fruit grown for processing. Blueberry production is limited but expanding. The farm-gate value of the berry sector is estimated at $13.8 million.[122] Many producers have tourism and visitor experiences (cafes, retail outlets and „pick your own). Major northern producers of berries include: Berry Exchange - Dunorlan, raspberries /blackberries ; Christmas Hills - Elizabeth Town, raspberries ; Naturally Blue - Lebrina, blueberries ; Hillwood Berry Farm - strawberries Aviemore - Gravelly Beach, blueberries ; Cherry Top - Lilydale, blueberries ; Crestview - Lilydale, blueberries Driscoll's/Costa JV at Elizabeth Town.
Development	The berry sector is expanding based on growing conditions and capacity to produce a quality product.
Fruit Sector	
Development	Opportunities exist in new and existing premium overseas markets. There are opportunities in China and other Asian markets for fruit particularly for apples and cherries. There is scope to develop premium niche markets through Tasmanian brand recognition. Climate change may see new market opportunities, with climatic conditions seeing the production of stone fruit moving further south.[123] Water surety and potential for increased access to water is improving through new irrigation schemes. There has been investment by major fruit companies that increase in production of cherries, stone fruit and berries. This has included investment in the northern region by Driscoll's (USA)/ Costa Group joint venture. Opportunities in other niche products e.g. goji berries, figs, pomegranates need further investigation. Constraints: Fruit producers generally face higher input costs (eg. water, energy and labour, relative to global competitors). There is increasing global competition from low cost production countries.

Source:Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

121 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P143

122 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P133

123 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P135

D6 Poppies

Sector	Direction/Actions
Poppies	
Tasmania Sector: Farms	Tasmania is the only growing location in Australia. Crops are currently grown in the north, north west, north east extending to the midlands, the central highlands and the Derwent Valley ,with potential to develop areas in the southern midlands. An average of 1000 farmers are contracted to grow poppies. In 2010 , 26,000 hectares were planted in 2010, with than 30,000 hectares approved for cultivation in the 2012 season. Tasmania has all the conditions for growing : a cool temperate climate, quality soils, reliable irrigation water and presence of existing production and processing capability deliver a competitive advantage in the production of high quality poppy crops Tasmania is the largest producer of thebaine poppies and in 2010 Australia produced 181 tonnes (78 % of global production). In the same year, Tasmania produced 25% of the world's production of morphine contained in concentrate of poppy straw. Payments to growers were estimated at $100 million in 2012, with continued growth projected.[124]
Tasmania Sector: Processors	The three processors are: Tasmanian Alkaloids (Westbury), GlaxoSmithKline (Latrobe) and TPI Enterprises (Cressy), and produce around 300 tonnes of concentrate alkaloid. Production is expected to double in the medium term.
Development	Processors are planning capital investments that totalling $100 million. [125] Secure supply from growers is required and the industry sees this coming from: improved productivity of existing growers (improved land management and methods); and development of new plantings. Recent research by TIA and DPIPWE has indicated that there are approximately 60, 000 hectares of land available on a sustainable basis for plantings. [126] Provision of on-demand irrigation from the large irrigation infrastructure projects will enable the transformation of land throughout Tasmania to allow the expansion of value-added crops including poppies and vegetables.

Source: Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan

124 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P136
125 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P136
126 Regional Economic Development Plan: Northern Tasmania, Department of Economic Development, Tourism and the Arts (DEDTA) Regional Economic Development Plan P138

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