



# Economic Development Strategy



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# Welcome

We are proud to present the Break O'Day Economic Development Strategy, a comprehensive roadmap designed to guide our community through a new chapter of economic growth and opportunity.

Break O'Day is a stunning region known for its natural beauty and vibrant community spirit. Our unique geography stretches from the mountains to the sea, featuring pristine beaches, temperate rainforests and serene bush. Through this Economic Development Strategy, we are committed to fostering economic growth that leverages our unique strengths and addresses the evolving needs of our community. As we look to the future, our focus is on economic development that balances growth with sustainability.



Acknowledging the tight resource constraints in which Break O'Day Council operates, this strategy has been designed to ensure our actions are both effective and achievable, balancing ambition with the availability of resources and funding. Collaboration with local businesses, residents, and partners at the regional, state, and national levels will be crucial to maximise the impact of our efforts.

Despite the challenges we face, Break O'Day is rich with opportunity. This Economic Development Strategy identifies several key areas for growth, including sustainable aquaculture, horticulture & high-value crop production, health & wellness, tourism, and the creative industries. By fostering these sectors, we can build a more diverse, resilient, and prosperous local economy. We are also committed to improving infrastructure, enhancing connectivity, and supporting workforce development to ensure that our region is well-equipped for the future.

By working together, we can develop a vibrant, sustainable community where businesses thrive, and residents enjoy a high quality of life.

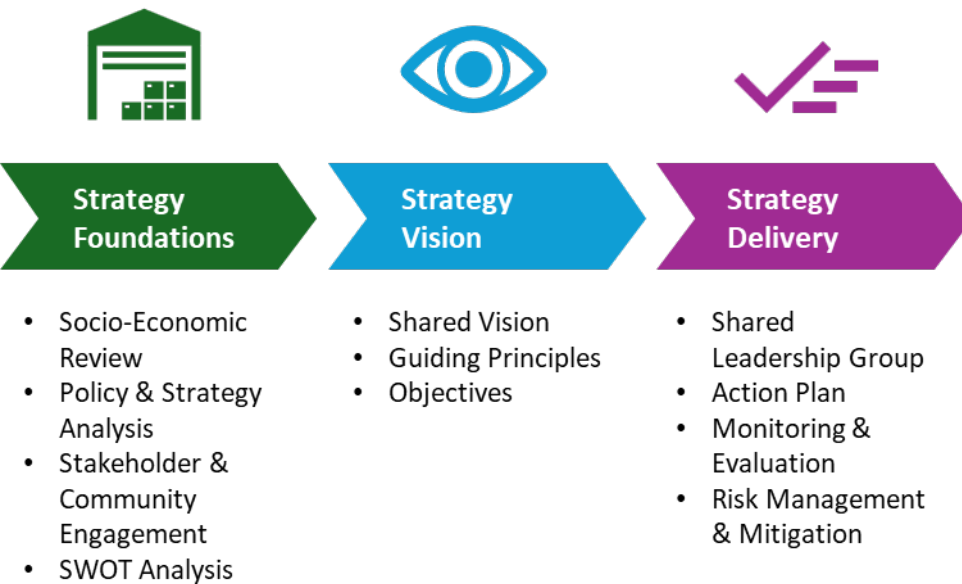
Thank you for your continued support and collaboration.

# Executive Summary

This Break O’Day Economic Development Strategy sets out a shared vision for the area’s economic future. It seeks to harness the collective direction and aspiration of our community, ensuring that the economic growth and prosperity of Break O’Day are both sustainable and inclusive.

Through a detailed review of the current economic landscape and an in-depth understanding of community values, the strategy explores Break O’Day’s strengths and challenges to identify actionable opportunities that will develop our economy. The strategy explores ways to foster economic leadership within our community, empowering local leaders to drive economic initiatives and innovation. Through this collaborative effort, we aspire to build a resilient and dynamic local economy.

The strategy consists of the following sections:



## Strategy Foundations:

The strategy draws evidence from a Socio-Economic Review, Policy & Strategy Analysis, Stakeholder & Community Engagement, and Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis. All research and consultations were undertaken over the course of 2024 and early 2025. The research identified a number of significant strengths in the Break O’Day economy, including stunning natural landscapes; renowned outdoor recreation and tourism offerings; high-value aquaculture and agricultural industries; and an array of thriving and creative local businesses. It also identified a range of challenges that could constrain the area’s future development, including an ageing population; restricted access and low quality of education and training; poor attraction and retention of skilled workers and young talent; issues with transport and digital connectivity; and inadequate access to some essential services.

## Strategy Vision:

Our Shared Vision for Break O’Day is “A Naturally Beautiful, Inclusive and Thriving Community of Collaboration and Opportunity”. This vision is supported by four key themes of Industry Development, Infrastructure, Natural Environment and Community Wellbeing that group insights and actionable initiatives. Our approach to economic development is underpinned by Guiding Principles, with four key Objectives fundamental in focusing our efforts.

## Strategy Delivery

Delivery of the strategy will be led by a targeted Action Plan and overseen by a Shared Leadership Group comprising Break O’Day Council, industry partners and the wider community. To ensure the strategy’s success, robust frameworks for Monitoring and Evaluation as well as Risk Management and Mitigation Measures will be in place to track progress and address potential challenges.

# Our Economic Journey



Break O'Day, located in Tasmania's picturesque northeast, has historically relied on primary industries, with our economy largely shaped by our natural resources. Traditional farming, forestry operations, and commercial fishing have played central roles in providing employment and have been the backbone of the local economy for many decades.

In recent decades, Break O'Day has faced a period of change, driven largely by the growing appeal of Tasmania as a tourism destination. The region's favourable climate and increasing recognition both nationally and internationally has contributed to the significant development of Break O'Day's visitor economy. Break O'Day has also experienced a decline in traditional industries, highlighting the need for economic diversification to support long-term growth and sustainability. The region's rural location and small population have also posed challenges in attracting new businesses and investment. The ageing population and limited access to higher education and specialised skills have further constrained economic growth. Despite these challenges, Break O'Day is on a path of transformation. The region has identified several key industries as growth opportunities:





**Sustainable Aquaculture:** With a pristine coastline and favourable environmental conditions, Break O'Day is well-positioned to expand its aquaculture sector. Land-based aquaculture also offers sustainable growth potential, minimising the impact on marine ecosystems while providing high-quality seafood products.

**Horticulture, Viticulture and High-Value Crop Production:** The region's fertile soil and favourable climate create ideal conditions for horticulture and viticulture. There's potential for the cultivation of high-value crops, including specialty fruits, vegetables, herbs and grapes. This sector not only diversifies the agricultural base but also taps into growing markets for organic and premium produce.

**Tourism:** Break O'Day's natural beauty, including the iconic Bay of Fires, is a significant draw for tourists. The tourism sector has seen steady growth, with an increasing focus on eco-tourism, cultural experiences, and adventure tourism. This sector complements the lifestyle economy, attracting new residents seeking a quality rural lifestyle and remote work opportunities.

**Creative Industries:** The region is fostering a growing community of small businesses and creative enterprises. These businesses, often run by local entrepreneurs, are contributing to a more vibrant and diverse local economy. There's an emphasis on supporting local artisans, food producers, and service providers, which strengthens the community and retains economic value.

**Healthcare and Wellness:** Break O'Day's demographic diversity, including an ageing population, creates significant opportunity in the healthcare and wellness space. Better community health can be a catalyst for economic development by expanding the labour force, boosting productivity and delivering significant social benefits.

Break O'Day's Economic Development Strategy is focused on leveraging emerging opportunities while addressing existing challenges.

Our Council is committed to working with the state government and leveraging the \$5.2 million Strategic Regional Partnership. This partnership, involving Break O'Day Council, Glamorgan-Spring Bay Council, East Coast Tasmania Tourism, the Tourism Industry Council Tasmania, and Regional Development Australia (Tasmania) and the Tasmanian Government, focuses on enhancing health services, education, housing, addressing barriers to economic growth, alongside tourism and infrastructure planning. These initiatives are designed to support economic growth and provide job opportunities within our communities, with a particular focus on young people.

By fostering a business-friendly environment and promoting the region's unique strengths, Break O'Day is positioning itself for a sustainable and prosperous future. Our economic journey is one of adaptation, collaboration and innovation. From a traditional resource-based economy, the region is transitioning into a more diversified and resilient economic base, with a strong focus on sustainable industries and community-driven growth.



## STRATEGY FOUNDATIONS

# Socio-Economic Review

A detailed socio-economic review revealed the following key trends within Break O'Day. These findings are summarised below and set out in detail in **Appendix A**.

## Demographics

- Break O'Day's population grew by 11.2% between 2016 and 2021, with a projected increase to 7,475 by 2037.
- Break O'Day is experiencing significant growth in the senior demographic (65+), with a 23.0% increase between 2016 and 2021, highlighting the need for expanded aged care services and healthcare innovations.
- Population projections indicate a continued rise in seniors, with 45.3% of the population predicted to be 65 or older by 2053, creating opportunities to develop targeted healthcare services and jobs for local professionals.

## Economy

- Break O'Day's economy has seen a 20.7% growth in industry value added from 2016-2023, with significant growth in professional services, administrative services, and real estate services.
- Agriculture remains a key sector with a 21.1% increase in value added, aquaculture also grew by 93.1%, while forestry and fishing have declined, underscoring the need for economic diversification and sustainable practices.
- Break O'Day ranks as one of the more disadvantaged LGAs in Tasmania with an Index of Relative Socio-economic Advantage and Disadvantage (IRSAD) score of 881, lower than the Tasmania average of 923.

## Visitor economy

- Break O'Day is a strong visitor destination, with the premier attraction, The Bay of Fires, attracting 196,000 annual visitors.
- The wider East Coast region is highly dependent on tourism, with the industry contributing an estimated \$197.6 million to the regional economy in 2019/20.
- The East Coast recorded a high Visitor to Resident Ratio of 21.4 in 2022, expected to rise to 41.4 by 2030. This is indicative of a strong tourism economy, however it also suggests significant pressure on local resources and infrastructure.

## Skills and occupations

- Break O'Day has a higher proportion of residents with vocational qualifications (24.4%) compared to the Tasmania state average (21.9%), and the workforce has above-average representation in labour, trades, management, and community services.
- However, the region lags in higher education, with only 13.4% of residents holding a bachelor's degree or higher, below the state average of 21.9%.
- Break O'Day's Index of Education and Occupation (IEO) score of 896 is slightly below the Tasmania average of 919, highlighting the need for further investment in educational and vocational training to improve skill levels and meet future workforce demands.



### Industries & businesses

- Break O'Day's employment is driven by service sectors, with health care, accommodation, food services, and retail trade accounting for 41.8% of jobs. Growth in health care, food services, and construction reflects rising demand, suggesting opportunities for further development.
- Location Quotient (LQ) analysis reveals several specialised and growing sectors within Break O'Day, particularly Agriculture, Forestry & Fishing (LQ = 1.99) and Accommodation & Food Services (LQ = 1.62).
- In 2021, Break O'Day had 525 businesses, up 11.7% from 2016. Growth was led by sole traders, particularly in health care, arts, and construction, highlighting emerging community needs and a growing entrepreneurial spirit.
- Strong growth has been observed in businesses and employment in healthcare, social assistance, arts and recreation, rental/real estate, construction, and professional services while industries like agriculture, manufacturing, and transport saw declines, especially among small businesses.

### Workplace & income

- In 2021, Break O'Day's labour force was 2,523, with an unemployment rate of 7.4%, higher than Tasmania's rate of 5.9%. Youth employment improved, with 51.2% of young people employed, a 9.3% increase from 2016. Service sectors have increased youth and mid-career hiring, while older workers are more prevalent in sectors like construction and professional services.
- The median weekly income in Break O'Day is \$836, lower than Tasmania's median of \$1,358. The region ranks in the second decile for economic disadvantage, with lower access to income and resources.
- As of 2021, 9.5% of the population received unemployment benefits, higher than Tasmania's rate of 4.9%, and 22.1% were on age pension, above the state average of 14.5%.

### Infrastructure

- Break O'Day's Digital Inclusion Index was 63.9 in 2022, below the national average of 73.2 and the state average of 70.0. In 2016, 66.6% of households had internet access, compared to 74.4% in Tasmania and the national average of 78.8%. However, regional demographics and housing stock might account for some of this disparity.
- 79.3% of Break O'Day residents commute within the region daily. 95.5% of households have access to motor vehicles, with 59.6% owning two or more. Car travel is the primary commute method (66.7%), followed by work from home (11.7%) and active transport (5.9%). Public transport use is minimal (0.1%), lower than the Tasmania average of 3.0%.

### Housing

- In 2021, 68.3% of Break O'Day's dwellings were privately occupied, lower than the Tasmanian average of 88.5%. The unoccupied rate was 31.3%, indicating a high number of holiday homes.
- Three-bedroom homes make up 47.3% of dwellings, similar to the state average of 47.8%. Given Break O'Day's ageing population, there's a need for greater diversity in housing options.
- Half of Break O'Day households (50.8%) own their homes, well above the Tasmanian average of 35.8%. While rental prices are rising faster than incomes (4.0% vs 2.4% annually), they remain below the 30.0% affordability threshold. However, median mortgage payments have increased to nearly 30% of weekly income, indicating a slight rise in homeownership costs.

# Policy and Strategy Analysis

A review of strategy and policy documents revealed the following challenges and priority areas for Break O'Day. A further breakdown by strategic theme is provided in **Appendix B**.

## WORKFORCE



- **Upskill the workforce** through targeted training and skill development programs that align with emerging local and regional industry needs.
- **Expand educational opportunities** for young people to access a range of educational institutions and qualifications.

## TOURISM



- **Diversify the tourism economy** by developing new attractions, experiences, and infrastructure to support year-round visitation.
- **Promote sustainable tourism** that complements Break O'Day's unique character and attracts visitors outside of peak seasons.

## HEALTH



- **Enhance healthcare infrastructure** to meet the growing needs of an ageing population, including access to specialist, emergency, and aged care services.
- **Expand healthcare services** to improve local access to healthcare.

## RESILIENCE BUILDING



- **Diversify the local economy** to reduce reliance on any single sector, ensuring greater economic resilience.
- **Strengthen infrastructure** by ensuring robust physical, digital, and social networks are in place to withstand economic and environmental shocks.

## HOUSING



- **Increase the availability of social and affordable housing** to support population growth and improve community cohesion.
- **Address housing affordability** by providing diverse housing options for communities.

## TRANSPORT



- **Enhance transport connectivity** through strategic improvements that increase access to employment, services, and key centres.
- **Improve public and active transport options** to ensure better connectivity within the region.

## RECREATION



- **Develop recreational facilities** to support active lifestyles and community engagement.
- **Create accessible public open spaces** that reflect community needs, enhancing social interaction, mental wellbeing, and physical health.

## DIGITAL CONNECTIVITY



- **Improve digital infrastructure** to enhance economic and social participation.
- **Increase internet access** in underserved areas, ensuring equitable access to digital opportunities for all.

# Stakeholder and Community Engagement

This strategy builds on the following stakeholder and community engagement activities. Full details of all stages of engagement activities are provided in **Appendix C**.

- **Ongoing engagement:** close contact and frequent engagement between Break O'Day Council, our consultant advisors and Regional Development Australia Tasmania to develop the strategy.
- **One-to-one engagements:** thirteen one-to-one interviews with strategic stakeholders.
- **Economic conversation workshops:** two workshops with key organisational stakeholders.
  - **Workshop 1:** to validate baseline economic analysis, gather stakeholder feedback, and formulate an initial action plan.
  - **Workshop 2:** to engage key stakeholders on the proposed actions for the strategy.
- **Community engagement survey:** an extensive engagement survey was published to gather valuable community insights.

## Key stakeholders

A variety of stakeholder groups have capacity to contribute to the economic development of Break O'Day, and we designed our stakeholder engagement activities to capture representatives from these groups. They include:

- Break O'Day Residents
- Local Businesses
- Voluntary, Community and Social Enterprise Sectors
- Skills and Education Organisations
- Regional & State Economic Development and Investment Agencies
- Regional Partnerships
- Council Officers
- Elected Representatives

## Key themes

At this stage, Break O'Day Council and its partners identified the following four overarching themes for the Economic Development Strategy. These themes provide a foundation for actionable insights and strategic planning.



### INDUSTRY DEVELOPMENT

This theme focuses on diversifying the local economy, fostering innovation, and supporting entrepreneurialism. By leveraging technological advancements and enhancing education and training programs, Break O'Day can build a dynamic and robust industrial base that maintains its strengths in primary resources while diversifying to ensure future economic security and sustainable growth.



### INFRASTRUCTURE

This theme involves improving transportation, digital connectivity, and essential services to support economic activity and enhance quality of life. Addressing infrastructure gaps and upgrading existing facilities will enable better accessibility and foster economic resilience.



### NATURAL ENVIRONMENT

This theme emphasises the importance of preserving and promoting the region's ecological assets. Sustainable practices in agriculture, fishing, and tourism, along with efforts to mitigate environmental impacts, are crucial for maintaining the natural beauty and resources of Break O'Day and the livelihoods that depend on them.



### COMMUNITY WELLBEING

This theme focuses on creating vibrant, inclusive, and healthy communities. Enhancing public spaces, promoting cultural and recreational activities, and ensuring access to essential services are key to improving the quality of life and fostering a strong sense of community identity.



## Stakeholder priorities

Following the above-mentioned engagement exercises, stakeholder views and priorities are summarised below.

### Industry Development

#### Industry Diversification

Stakeholders advocate for the growth of diverse industries, such as healthcare, aquaculture, agriculture, specialty crops, and tourism, to reduce economic dependency on any single sector. Expanding support to start-ups and small businesses can foster innovation and resilience. Stakeholders see value in providing further assistance for businesses seeking to diversify their own operations.

#### Access to Education & Training

Stakeholders believe that local training programs, developed in partnership with educational institutions, are necessary to better align with industry needs. Improving access to these programs is seen as a key priority for the community. Promoting online learning platforms can also enhance educational opportunities and improve the region's competitiveness.

#### Marketing Promotion for Talent Retention

Some stakeholders reported that a strong branding campaign is essential for Break O'Day, emphasising its unique lifestyle, career opportunities, and community benefits. Enhancing digital presence through online platforms and social media is an effective way to effectively showcase success stories, local businesses, and community events. Collaboration with local businesses and educational institutions to create internship and mentorship programs is also crucial for retaining young talent.

### Infrastructure

#### Accommodation Diversification

A lack of available housing options for workers is considered a significant barrier to growth by many stakeholders. Partnering with developers to create worker-friendly housing and multiple dwelling developments is seen as a key opportunity. Some stakeholders express concerns about the absence of temporary housing solutions for seasonal workers or those in transition. Addressing these concerns is key to attracting and retaining talent and sustaining our future workforce.

#### Transport Connectivity

Upgrading road infrastructure to boost safe and efficient travel is identified as a key priority for the community. Stakeholders highlight the need for improvements in public transport options to enhance connectivity to & from and within Break O'Day. Furthermore, promoting sustainable and active travel options, such as walking and cycling trails, are identified as ways to improve the region's overall liveability.

## Natural Environment

### Environmental Protection

Some stakeholders highlighted the importance of industries adopting and implementing sustainable and eco-friendly practices, taking full responsibility for their environmental impact. The tourism sector is highlighted as a priority. Developing tourism experiences that showcase local culture and natural beauty are seen as vital for the community. The community is keen to be involved in tourism planning and in encouraging environmental stewardship amongst both residents and visitors.

### Resilience Building

Many stakeholders are aware of the significant risk that climate change poses to Break O'Day and they express concerns about the frequency of severe weather events threatening our natural environment and the livelihoods that depend on it. Development and implementation of resilience plans are seen to be fundamental in identifying, assessing, and managing environmental risks and enabling economic growth.



## Community Wellbeing

### Public Realm Activation and Community & Recreational Infrastructure

Increased activation of community spaces and recreational facilities is desired by some stakeholders. Organising regular pop-up markets and community events can activate public spaces and foster an increased sense of community. Through such initiatives there's an opportunity to positively contribute to the area's placemaking, tourism, and resident attraction and retention capabilities.

### Access to Healthcare

Many stakeholders prioritise the expansion of access to local healthcare facilities to meet community needs, particularly in terms of aged care services. Attracting and retaining healthcare professionals in the region is also identified as a key opportunity to improve overall community wellbeing and stimulate economic growth.

# Strengths, Weaknesses, Opportunities and Threats Analysis

The following strengths, weaknesses, opportunities, and threats (SWOT) have been identified through the above analysis.







## STRATEGY VISION



## Shared Vision

Through the above socio-economic review, policy & strategy analysis, stakeholder engagement, and SWOT analysis, the following shared vision has been designed to capture the economic ambition for Break O'Day. To deliver on this vision, a Shared Leadership Group will provide strong leadership, facilitate collaboration, and guide the economic direction of Break O'Day.

*“A Naturally Beautiful, Inclusive and Thriving Community of Collaboration and Opportunity”*

Our vision is to foster sustainable economic growth rooted in the unique beauty and cultural diversity of our region. By leveraging our breathtaking natural environment and strengthening our community collaboration, we aim to create a vibrant economy that balances progress with preservation.

Through collective action, we will cultivate an inclusive community where everyone feels safe, welcome, and connected - a community that offers equal opportunities for all to prosper.

In this place of opportunity, businesses succeed, innovation thrives, and people of all backgrounds come together to build a prosperous and collaborative economic future for Break O'Day.



# Guiding Principles

This Economic Development Strategy is built around our shared vision for Break O’Day, anchored in the strength of our community partnerships. The following guiding principles are central to the strategy and in bringing forward a collective future of economic prosperity.



## Embracing Our Natural Environment

*Ensure responsible management of our natural resources to cultivate a clean, vibrant environment that enhances quality of life, promotes health and wellbeing, drives sustainable economic development, and maintains long-term resource viability for residents and visitors.*



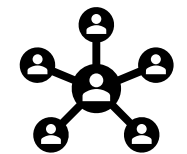
## Cultivating Opportunities for All

*Provide equal access to resources and essential services, create a safe and welcoming environment, and empower all individuals to thrive, pursue their goals, and contribute to our community's wellbeing and economic growth.*



## Supporting a Diverse & Thriving Community

*Develop an inclusive economy that celebrates our diversity, fosters innovation and entrepreneurship, creating a vibrant environment where businesses thrive, and residents enjoy a rich variety of cultural and economic opportunities.*



## Fostering Collaboration & Partnerships

*Encourage shared leadership and active community involvement to build strong relationships, open communication, and connectivity that creates a supportive and productive economic environment.*



# Objectives

To achieve our shared vision, Break O'Day Council and its partners have set the following four objectives, one within each of the strategy key themes:

## **Objective 1: Break O'Day will have a varied and resilient local economy that supports diverse industries and leverages the region's unique strengths.**

- **Support Industry Sustainability:** Continue to support and enhance our core sectors, such as agriculture, aquaculture, and tourism, ensuring they remain robust contributors to the local economy. Actively encourage the development of diverse industries and economic activities, broadening the region's industrial base. Promote sectors that align with the priorities and values of the community and ensure the economy is well-balanced and capable of weathering economic fluctuations.
- **Foster Entrepreneurship and Innovation:** Encourage regional entrepreneurial activities and innovation. Support startups and small businesses seeking to innovate and diversify the region's economy.
- **Strengthen Education and Workforce Development:** Invest in education and training provision that improves educational participation and completion. Prioritise education and training programs that align with the needs of an evolving economy to ensure Break O'Day attracts and retains talent.
- **Enhance Break O'Day's Regional Identity:** Create a cohesive brand identity for Break O'Day through town centre activation, local product development, and tourism promotion. By supporting local businesses to promote events, and attractions, Break O'Day will showcase the lifestyle and work-life benefits of the area.

## **Objective 2: Break O'Day's communities and businesses will have access to high-quality infrastructure that advances industries, fosters a resilient economy, and attracts and retains talent.**

- **Support Worker Accommodation Diversification:** Facilitate and advocate for sufficient housing for our workers, including permanent skilled workers and seasonal employees. By supporting the development of worker accommodation, Break O'Day will further the regional benefits of the tourism industry.
- **Responsive Strategic Land Use Planning:** Implement strategic and responsive land use planning and support targeted infrastructure investments. By aligning land use planning with community and infrastructure needs, we will cultivate a diverse environment that supports industry, individuals and the environment.
- **Strengthen Reliability of Transport Infrastructure:** Advocate for the improved resilience and accessibility of our transport networks. Explore opportunities to improve multimodal transport with a focus on the provision for active transport, supporting individuals and industries by enhancing connections with neighbouring areas and beyond.
- **Expand Digital Connectivity:** Enhance access to high-speed internet and reliable digital infrastructure to support the Break O'Day community. Residents and businesses will benefit from better digital services, helping to foster local engagement and support economic activity in the area. Remote digital working will be encouraged and supported, helping to attract and retain professionals who may be employed outside the Break O'Day area.

**Objective 3: Break O'Day will achieve sustainable economic growth and enhance our areas of outstanding natural beauty by supporting responsible business practices and balancing job protection with environmental stewardship.**

- **Harness Natural Beauty to Attract Residents:** Leverage Break O'Day's natural beauty and quality of life to attract new residents and skilled workers, supporting population growth, fostering demand and a sustainable workforce for local businesses.
- **Support Tourism Initiatives:** Leverage our region's natural surroundings to develop regenerative tourism attractions that engage visitors sustainably. By implementing conservation projects and educating tourists, we will protect key natural habitats and showcase the region's commitment to sustainability.
- **Enhance Environmental Education & Community Involvement:** By improving environmental education and awareness, we will empower businesses and individuals to leverage natural resources in a sustainable manner and adopt circular practices that ensure Break O'Day's long-term environmental and economic health.
- **Champion Environmental Sustainability & Climate Resilience:** Enhance environmental sustainability and resilience through proactive biodiversity restoration and climate resilience planning. Addressing crucial concerns such as extreme weather events, water quality & security and biodiversity conservation, will ensure our natural assets are preserved for future generations.

**Objective 4: Break O'Day's community will have access to the essential services, resources and opportunities needed to contribute to a thriving, healthy and connected local economy.**

- **Improve Access to Healthcare and Wellbeing Facilities:** Identify gaps in provision, attract skilled professionals and prioritise aged care to ensure our healthcare and wellbeing services meet community needs. Leverage the opportunities generated by an ageing population to create economic and employment opportunities whilst ensuring access to essential services for all.
- **Expand Access to Housing:** Foster partnerships and encourage investment in housing projects that increases housing availability and affordability to meets the diverse needs of our residents.
- **Enhance Access to Education and Training:** Expand access to innovative education and vocational training programs that develops a workforce well equipped with relevant skills. By ensuring these opportunities are available to all, we will inspire engagement and cultivate a culture of lifelong learning.
- **Improve Community and Recreational Infrastructure:** Enhance recreational facilities that support active lifestyles and community wellbeing. Community needs will be aligned with community infrastructure provision through strategic investment in the development, maintenance, and repurposing of existing infrastructure.



## STRATEGY DELIVERY



## Break O'Day Shared Leadership Group

Whilst Break O'Day Council has put together this Economic Development Strategy, delivery of this strategy is a collaborative effort. Achieving our shared vision and collective future requires the active participation and partnership of the entire community. This strategy emphasises the importance of shared leadership, where the community and Council work together, playing complementary roles that enhance each other's efforts.

We have developed a set of actions, across four key themes, that will guide our approach to economic development. Delivery of these actions will be overseen by a Shared Leadership Group, ensuring that actions are aligned with our collective goals and that every stakeholder has a voice in shaping our prosperous economic future.

The Shared Leadership Group will deliver strong economic leadership and facilitate collaboration between local government, industry and the community.



## Members

- Break O'Day Council
- Community representatives
- Key local businesses and organisations, including representation from the following key sectors:
  - Aquaculture
  - Hospitality
  - Mining
  - Fishing
  - Farming
  - Healthcare & Wellbeing (including Aged Care)
- Break O'Day Employment Connect
- Break O'Day Chamber of Commerce & Tourism
- Break O'Day Business Enterprise Centre
- East Coast Tasmania Tourism

## Responsibilities

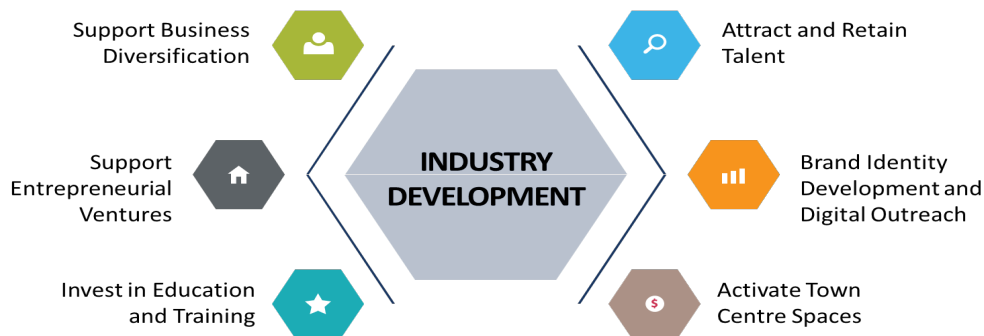
- Oversee the implementation of actions.
- Facilitate coordination and communication among stakeholders on priority actions.
- Ensure alignment with Break O'Day and Tasmania's strategies, goals and objectives.
- Identify and support high-potential businesses and community leaders.
- Facilitate regular progress meetings.

# Action Plan

Through detailed socio-economic and policy reviews, stakeholder engagement and SWOT analysis, an initial set of actions for the strategy was developed. A second economic conversation workshop was then held to engage key organisational stakeholders on the proposed actions. Following this engagement, actions were refined and developed across the four key themes of the strategy. The Economic Development Strategy actions are presented below, with additional information on next steps, priorities, and responsible stakeholders detailed in full in the supporting Action Plan spreadsheet (**Appendix E**).

## Industry Development

These targeted actions seek to develop a resilient and adaptable industry base for Break O'Day.



## Proposed Actions

### ***Support Business Diversification***

- Engage regionally with the Chamber of Commerce, Regional Development Australia (RDA), Northern Tasmania Development Corporation (NTDC), Break O'Day Employment Connect and the wider community to support business diversification and partnership working. Potential industries to target include sustainable aquaculture, horticulture, viticulture and high-value crop production, tourism, creative industries, and health & wellness. Through business diversification, continue to focus on sustainable practices (such as supporting farmers and fishers to transition to organic or regenerative farming), developing positive impact tourism and building adaptive capacity to external climate related changes.

### ***Support Entrepreneurial Ventures***

- Linked to the Business Diversification action, understand the support required and establish development mechanisms for emerging entrepreneurs, such as funding and grants, business planning & strategy development, and mentoring programs. Explore co-working spaces to support start-ups and small business collaboration.
- Create an enabling environment that fosters innovation and growth for start-ups, social enterprises, and small businesses. Leverage the Industry Growth Program to provide support and incentives that encourage emerging businesses to establish or relocate to the Break O'Day area.

### ***Invest in Education and Training***

- Partner with local educational institutions and wider stakeholders to develop and implement vocational training programs and curriculums ensuring they are aligned with local needs and demand. In turn reducing the need for families to relocate and addressing regional and parental drift. Leverage the Study Hub for further educational support.
- Engage with Break O'Day Employment Connect and local businesses to focus on skills and training that are in demand in both traditional and emerging industries (such as industry specific qualifications, customer service & sales training, and digital & IT training). Increase access to apprenticeship programs that encourage students and young professionals to remain in, or move to, Break O'Day.

## ***Attract and Retain Talent***

- Work with local businesses and Break O'Day Employment Connect to consider career events, young leadership programs, and marketing campaigns that highlight the region's lifestyle benefits to attract new talent.
- Collaborate with State Government and key stakeholder organisations to explore relocation incentives. Leverage existing Council Wellbeing Project and continue to explore opportunities with Tasmanian Community Fund to meet Break O'Day's community needs and support the attraction and retention of talent.

### **Case Study: Greater Shepparton City Council's Youth Strategy**

The Greater Shepparton City Council in Victoria faces challenges in retaining young talent, as many residents leave for opportunities in larger cities. In response, the Council developed a comprehensive Youth Strategy to foster engagement and create attractive local opportunities.

#### **Key Components:**

1. **Employment Pathways:** Partnerships with local businesses to create apprenticeships, traineeships, and internships.
2. **Youth Leadership Programs:** Initiatives to empower young residents in leadership and community engagement.
3. **Community Events:** Regularly organised festivals (e.g. Careers Day Out) and workshops to promote local connections and opportunities.
4. **Health and Well-Being Initiatives:** Programs focusing on mental health (Kindness Campaign) and work-life balance support.
5. **Targeted Marketing Campaigns:** Promotion campaigns highlighting the benefits of living and working in Greater Shepparton.

**Challenges:** Infrastructure limitations, engaging diverse demographics, and measuring retention impact.

**Outcomes:** Increased youth retention and local employment rates, greater community participation in governance, and positive feedback from young residents regarding living conditions.

## ***Brand Identity Development and Digital Outreach***

- Support and showcase the development of local products and services (such as organic farming, sustainable fishing, specialty crop production, viticulture, forestry products, and sustainable & agri-tourism) that are tied to the region's natural capital, creating a strong brand identity.
- Continue to develop digital promotion platforms, workshops and networking events that facilitate collaboration between local producers, retailers, and other stakeholders. Consider how Business Enterprise Centre, East Coast Tasmania Tourism and Rural Business Tasmania can collaborate to enhance digital engagement.

## ***Activate Town Centre Spaces***

- Collaborate with the community to activate and enhance foreshore spaces. Create a vibrant network of public realm spaces that promote accessibility and support diverse and flexible recreational facilities.
- In alignment with community demand, explore the viability of pop-up shops, temporary markets, community hubs and wider events to revitalise town centre areas and stimulate economic activity. Support the promotion of these opportunities with local entrepreneurs and community groups.
- Support local businesses to extend opening hours by promoting events and pop-up facilities, particularly during peak tourist season. Encourage residents and visitors to shop locally by improving communication and advertising of current hours. Explore the implementation of consistent business opening hours to align with community needs.
- Implement initiatives to revitalise & repurpose vacant properties and improve the visual appeal and streetscape of our key centres.



### Case Study: Regular Pop-Up Markets and Events - Bellingen, New South Wales

Bellingen, a small town in New South Wales, has embraced regular pop-up markets and events to develop a local identity, stimulate local economic growth and enhance community engagement, showcasing local artisans, farmers, and small businesses.

#### Key Components:

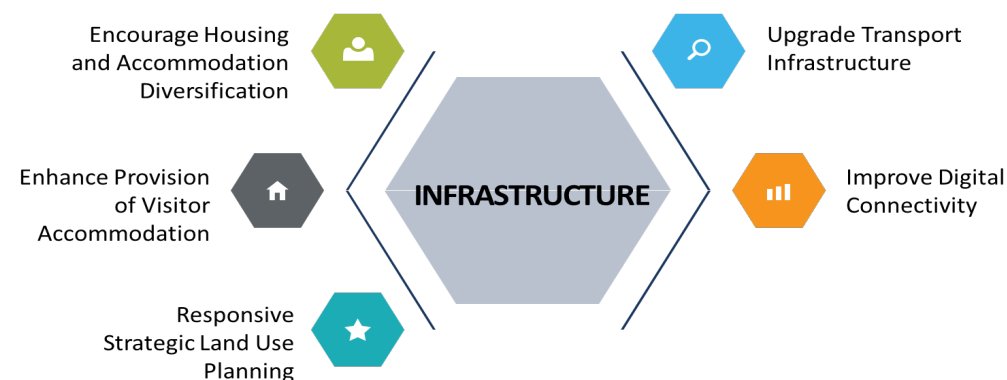
1. **Monthly Pop-Up Markets:** Regular markets featuring local farmers, artisans, and food vendors create a vibrant atmosphere.
2. **Marketing and Promotion:** Effective marketing strategies utilise social media platforms, a dedicated website, and online event listings to raise awareness and drive attendance. The Bellingen Council website features upcoming events, vendor applications, and community news.
3. **Themed Events:** Special events like food festivals and craft fairs highlight local culture and attract diverse participants.
4. **Community Involvement:** Local organisations and community groups participate, promoting collaboration and volunteerism.
5. **Sustainability Focus:** Events promote eco-friendly practices and aim to reduce waste, aligning with community values.

**Challenges:** Weather dependency, resource allocation for event organisation, and competition with other local events.

**Outcomes:** Increased sales for local businesses, strengthened community ties, and enhanced tourism, positioning Bellingen as a vibrant cultural destination.

## Infrastructure

These targeted actions seek to provide Break O'Day with an adaptable infrastructure foundation that fosters economic development.



## Proposed Actions

### *Encourage Housing and Accommodation Diversification*

- Collaborate with local businesses to address the shortage of suitable accommodation for workers, particularly for skilled and key professions such as nursing and teaching, as well as new or seasonal employees. Identify strategic 'quick win' accommodation options to attract and retain skilled workers.
- Collaborate with state and private sector to develop affordable housing options for working individuals, couples, and families.
- Explore opportunities to address high rental prices and the shortage of mid-term to long-term accommodation.
- Expand the housing provision for Break O'Day's ageing population. Explore and encourage the development of multiple dwellings and micro units.

### ***Enhance Provision of Visitor Accommodation***

- Expand premium accommodation offerings to attract higher-spending visitors, ease the reliance on Airbnb provision, and support local businesses and economic growth.

### ***Responsive Strategic Land Use Planning***

- In alignment with Break O'Day's Land Use and Development Strategy, ensure strategic and appropriate provision for diverse land uses. Collaborate with stakeholders to ensure community needs are regularly reviewed and incorporated.

### ***Upgrade Transport Infrastructure***

- In alignment with Break O'Day's Transport Master Plan, invest in road maintenance to improve the reliability and condition of transport infrastructure (including roads such as St Marys Pass) to boost connectivity to & from and within the region.
- Explore the development of an Integrated Transport Strategy for Break O'Day. Seek to improve public transport provision, particularly around town centres.
- Improve local transport connectivity and accessibility, including street permeability and parking, particularly in town centres and during peak tourist season. Focus on safe & accessible active travel routes (both walking and cycle trails) and promote passive movement to enhance placemaking.

### ***Improve Digital Connectivity***

- Explore opportunities to improve digital infrastructure, such as the introduction of more Starlink services, particularly in remote areas to enhance business operations and access to services.
- Improve reliability of high-speed internet access to support modern business needs.

## Natural Environment

These targeted actions seek to build a sustainable and resilient natural environment that supports long-term community, environmental, and economic prosperity.



### Proposed Actions

#### ***Harness Natural Beauty to Attract Residents***

- Harness Break O'Day's natural beauty and high quality of life to attract new residents and workers, fostering population growth and meeting the workforce demands of local businesses.

#### ***Promote Regenerative Tourism***

- Promote tourism that actively restores and enhances our natural capital. Educate visitors on conservation activities and Break O'Day's natural values while generating sustainable economic benefits for the community.

#### ***Leverage Natural Resources***

- Leverage Break O'Day's natural resources to drive sustainable industry growth while preserving environmental integrity. Promote areas such as sustainable agriculture, aquaculture, and positive impact tourism.

#### ***Foster Institutional Partnerships and Community Involvement***

- Engage with institutional investors, such as those who own forestry assets, to develop collaborative initiatives that align their investment goals with community benefits. Establish regular dialogue to explore opportunities for joint ventures in sustainable practices, carbon offset projects, and community-driven positive impact tourism.
- Support North East Bioregional Network and other community organisations to develop programs that educate the community on the importance of our natural capital.

#### ***Support Biodiversity and Advance Circularity***

- Support and engage with biodiversity restoration projects to improve the health and resilience of ecosystems, such as reforestation, wetland restoration, and invasive species control.
- Promote circular economy practices and develop areas such as waste reprocessing and microgrids.

#### ***Develop Climate Resilience Planning***

- Through development of the Council's Climate Change Action Plan, continue to develop and implement plans to address climate change impacts and protect ecosystems & communities.
- Enhance the ecosystem and community's capacity to endure and recover from extreme weather events through focused resilience planning and protective measures.



## Community Wellbeing

These targeted actions seek to support long-term community wellbeing, subsequently generating local economic benefit.



### Proposed Actions

#### *Improve Healthcare and Childcare Services*

- Assess the nature & extent of inadequacy in healthcare services in Break O'Day, identifying gaps and mismatches between supply and demand. Explore options to integrate technological health solutions such as telehealth services and digital health management systems.
- Engage with state and healthcare providers to discuss incentives to attract and retain skilled healthcare professionals.
- Engage with childcare providers and Early Childhood Australia to explore options to expand access to childcare and family support services. In doing so, support workforce development as well as improving childcare provision.

#### *Expand on Aged Care Opportunities*

- Prioritise aged care and related services to meet the growing needs of our aging population, supporting sector growth and industry diversification.

#### **Case Study: New Zealand's Approach to Aged Care**

New Zealand's ageing population necessitates a comprehensive aged care strategy, focusing on community-based solutions and integration of services.

#### **Key Components:**

1. **Community-Based Care:** Programs support ageing in place through Home and Community Support Services (HCSS).
2. **Integrated Services:** Collaborative models among local health authorities and Primary Health Organisations (PHOs) enhance service delivery.
3. **Cultural Competence:** Services are tailored to diverse populations, particularly Māori and Pasifika.
4. **Workforce Development:** Training initiatives aim to address workforce shortages in aged care.
5. **Technology Integration:** Telehealth and digital tools improve care management.

**Challenges:** Funding constraints, workforce shortages, and rural accessibility impact service delivery.

**Outcomes:** Improved quality of life and health outcomes for older adults, increased awareness of their rights, and ongoing policy adjustments.

#### *Improve Access to Housing*

- Explore partnerships to improve access to housing. Encourage investment in accommodation diversification, focusing on a community led and place-based approach to housing investment.

### ***Enhance Education and Training***

- Develop vocational training programs in collaboration with the Trade Training Centre and Break O'Day Employment Connect, leveraging the Study Hub's tertiary and vocational education focus. Ensure alignment with local industry needs and integration with mainstream education through the VET system.
- Enhance access to education and training provision and explore opportunities to improve Break O'Day's local education offering, such as further in-person teaching for years 11 and 12, that could potentially bring in tertiary education support.

### ***Upgrade Community and Recreational Infrastructure***

- Ensure targeted investment in the development, maintenance, and repurposing of community infrastructure to ensure it aligns with the needs of the Break O'Day area. Explore opportunities to develop cultural & recreational facilities and services, including trails, green spaces, game fishing, water sports, and an aquatic centre.

#### **Case Study: 7stanes – Mountain Biking in Southern Scotland**

The 7stanes mountain bike network highlights the benefits of a branded, comprehensive approach to outdoor recreation, emphasising sustainable tourism and community involvement. It provides a cohesive online platform that advertises a network of world-class mountain biking centres enriched by local myths and history.

#### **Key Components:**

1. **Targeted Marketing:** Campaigns, marketing and branding attracts a diverse range of visitors, from families to competitive riders.
2. **Diverse Trail Design:** Expertly crafted trails cater to various skill levels, promoting accessibility for all riders.
3. **Community Engagement:** Local volunteers actively participate in trail maintenance and events, fostering community spirit.
4. **Environmental Sustainability:** Sustainable practices in trail management help preserve natural landscapes and wildlife.
5. **Visitor Infrastructure:** Enhanced facilities, including bike rentals and visitor centres, improve the overall user experience.

**Challenges:** Visitor seasonality and weather dependency. Balancing trail use with environmental conservation remains a concern.

**Outcomes:** Increased tourism and economic growth, improved community involvement, and a model for sustainable outdoor recreation management.

# Monitoring and Evaluation Framework

In alignment with the above Action Plan, the following monitoring and evaluation framework will assess the strategy's progress towards its Objectives.

| Theme                | Objectives   | Key Performance Indicators   | Source   |
|----------------------|--|--|--|
| Industry Development | Support Industry Sustainability                    | Economic output by industry<br>Employment by industry  | economy.id<br>economy.id                           |
|                      | Foster Entrepreneurship and Innovation             | Business entries and exits   | ABS Data by Region                                 |
|                      | Strengthen Education and Workforce Development     | Proportion of population that is of working age  | ABS Census   |
|                      | Enhance Break O'Day's Regional Identity            | Population and age profile<br>Visitor numbers  | ABS Census<br>TVS Analyser, Tasmanian Visitor Data |
| Infrastructure       | Support Worker Accommodation Diversification       | Approvals of worker accommodation units<br>Number of new houses relative to number of new families | Council records<br>ABS Census                      |
|                      | Responsive Strategic Land Use Planning             | Review of key strategic land use documents   | Council records                                    |
|                      | Strengthen Reliability of Transport Infrastructure | Upgrades to state roads<br>Improvements to local road conditions                                   | State records<br>Council records                   |
|                      | Expand Digital Connectivity                        | Digital access   | Australian Digital Inclusion Index                 |



| Theme               | Objectives   | Key Performance Indicators   | Source  |
|---------------------|--|--|---|
| Natural Environment | Harness Natural Beauty to Attract Residents                | Population change  | ABS Census  |
|                     | Support Tourism Initiatives                                | Tourism businesses/startups<br>Accredited ecotourism businesses  | Australian Tourism Data Warehouse   |
|                     | Enhance Environmental Education & Community Involvement    | Environmental education and information activities<br>Community involvement  | Public media and event statistics<br>ABS Census (volunteer work)  |
|                     | Champion Environmental Sustainability & Climate Resilience | Municipal GHG emissions profile<br>Climate resilience  | Emissions data aggregation services<br>(snapshotclimate.com.au)<br>ABS Australian Disaster Resilience Index |
| Community Wellbeing | Improve Access to Healthcare and Wellbeing Facilities      | Healthy living and outcome indicators  | Community Health Check, Primary Health Tasmania   |
|                     | Expand Access to Housing                                   | Housing affordability (rent payments as a percentage of household income)<br>Social housing waitlist<br>Housing development completion | ABS Census<br>State Government (Homes Tasmania)<br>Council records  |
|                     | Enhance Access to Education and Training                   | Study Hub enrolments<br>Completion rate of secondary and tertiary education<br>Educational enrolments                                  | Local education records<br>Local education records<br>State education records                               |
|                     | Improve Community and Recreational Infrastructure          | Investment in recreational infrastructure<br>Community events/initiatives  | Council infrastructure team<br>Council records  |

# Risk Management and Mitigation Measures

Potential key risks to the strategy's success are detailed below with proposed mitigation measures.

| Risk                                   | Description  | Impact | Likelihood | Mitigation Strategies  |
|--|--|--------|------------|--|
| <b>Resource Dependence</b>             | Vulnerability to market fluctuations and reliance on limited range of local industries.                          | Medium | Medium     | <ul style="list-style-type: none"> <li>Diversify the region's industry base</li> <li>Support and invest in emerging industries</li> <li>Strengthen local partnerships, networks and supply chains</li> </ul>   |
| <b>Skill Shortages</b>                 | Insufficient skilled workforce to meet community and industry needs.   | High   | High       | <ul style="list-style-type: none"> <li>Enhance local education and training provision through partnerships with educational institutions and the creation of relevant courses</li> <li>Facilitate initiatives to attract and maintain skilled workers</li> </ul>     |
| <b>Infrastructure Limitations</b>      | Inadequate infrastructure to support community and industry growth.  | High   | Medium     | <ul style="list-style-type: none"> <li>Prioritise critical infrastructure investment, such as upgrades to roads and broadband</li> <li>Collaborate with state and federal government to leverage funding for key projects</li> </ul>                                 |
| <b>Housing Shortages</b>               | Limited affordable housing options, for both residents and workers.  | High   | High       | <ul style="list-style-type: none"> <li>Collaborate with local businesses, public and private sectors to address accommodation shortages for key workers</li> <li>Explore options for housing diversification to meet the varied needs of the community</li> </ul>    |
| <b>Extreme Weather Events</b>          | Disruption to local agriculture, tourism, infrastructure and communities from extreme weather events.            | High   | Medium     | <ul style="list-style-type: none"> <li>Identify high-risk areas and develop climate resilience strategies and plans to protect communities and key infrastructure</li> <li>Enhance community preparedness and response procedures for extreme weather</li> </ul>     |
| <b>Negative Environmental Impact</b>   | Adverse effects of local development, industry and community activities on the natural environment.              | Medium | Medium     | <ul style="list-style-type: none"> <li>Promote sustainable tourism and conservation efforts</li> <li>Support biodiversity restoration projects to protect ecosystems</li> <li>Foster partnerships for environmental education and sustainable practices.</li> </ul>  |
| <b>Insufficient Essential Services</b> | Inadequate local provision of essential services, such as healthcare and education, due to resource limitations. | High   | Medium     | <ul style="list-style-type: none"> <li>Frequently engage with communities to understand and address service gaps</li> <li>Leverage existing partnerships and identify funding opportunities to enhance the accessibility and quality of critical services</li> </ul> |
| <b>Community Resistance</b>            | Local opposition to new projects or changes.   | Medium | Low        | <ul style="list-style-type: none"> <li>Engage in regular community consultation</li> <li>Incorporate local stakeholder and community feedback into decision-making</li> </ul>  |





# Appendix A: Socio-Economic Review

## Demographics

According to the 2021 Census, our population was approximately 6,770, marking an 11.2% increase from 2016, outpacing Tasmania's state growth rate of 9.3%. Our estimated population, as of June 2022, was just over 7,000. By June 2037, our population is projected to grow to 7,475 under the medium series<sup>1</sup> population projections, with an annual growth rate of 0.4%. This is slightly lower than Tasmania's projected annual population growth rate of 0.5%. This growth presents challenges and opportunities in delivering inclusive and sustainable economic benefits to our community.

A key component of this demographic shift is the growth in the 20–34 age group, which increased by 28.3% (154 people) between the 2016 and 2021 Censuses. This growth rate is higher than Tasmania's state growth rate of 22.5% for the same age cohort. Within this cohort, those aged 25–34 experienced a particularly significant rise of 29.7% between 2016 and 2021. The national pattern of delayed childbearing, as evidenced by the rising average age of first-time mothers from 28.4 years in 2011 to 29.7 years in 2021, suggests a potential wave of new family formations among this age group in the near future.

An inflection point around 2019/20 is also particularly noteworthy, where the number of pre-seniors (60–69) overtook the number of middle-aged adults (45–59), highlighting the ageing of existing families and the attractiveness of Break O'Day for those seeking a lifestyle retirement. Simultaneously, the number of adults (30–44) surpassed the number of young adults (20–29). As families who settled in Break O'Day over the past 15 years transition into later life stages, the demand for services and amenities tailored to older adults increases.

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<sup>1</sup> The medium series projections are considered the most likely outcome at the time that the projections were developed.

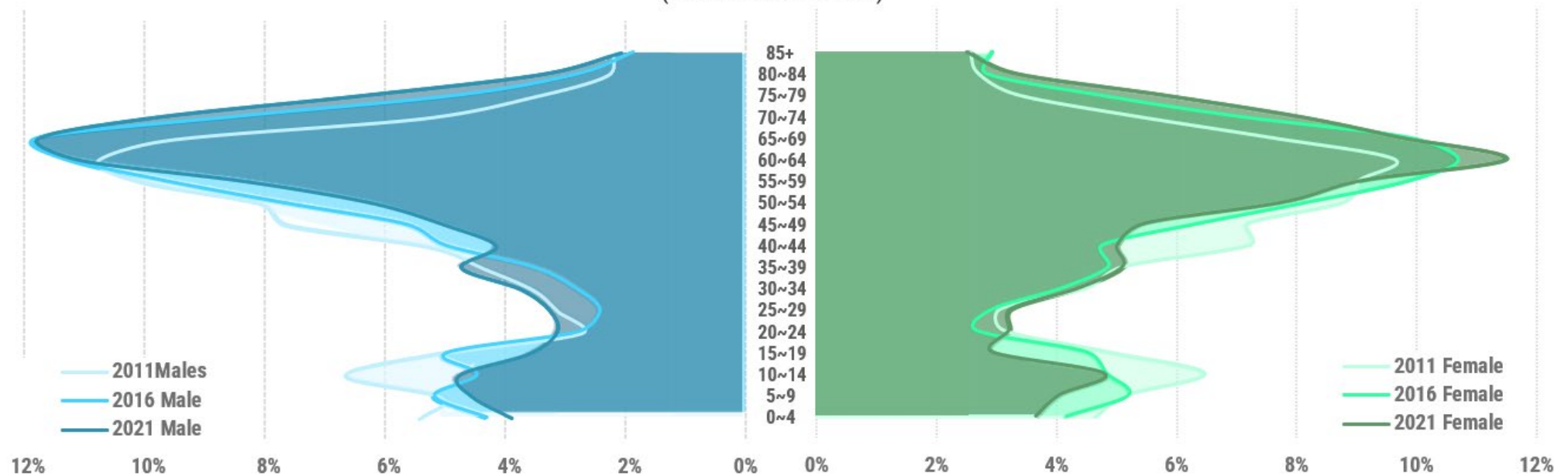
Despite a decline in the population of children (0–14), the steady numbers in the young adult demographic present an opportunity to attract new families to our community. To harness this potential, our Council is committed working with the state government via the Strategic Regional Partnership and other stakeholders to enhance childcare services, educational programs, and family-friendly amenities.

By strategically investing in these areas, alongside capitalising on the region's natural beauty, enhancing digital connectivity to support further opportunities for remote working, and diversifying employment opportunities, Break O'Day can offer an appealing lifestyle that promotes an improved work-life balance. These efforts aim to create a thriving, intergenerational community, positioning Break O'Day as a desirable place to live and work.

## Ageing population

Break O'Day is experiencing a significant ageing population, reflecting national trends in Australia. The 65+ age group in our community remains the largest demographic, with a 23.0% increase (401 people) between the 2016 and 2021 Censuses, surpassing Tasmania's state growth rate of 18.1% for the same age cohort. This growth implies the acute need for expanded aged care services and facilities.

Break O'Day's Population by Age Group in 2011, 2016, and 2021  
(Source: ABS Census)



Given the diverse healthcare needs of this cohort, our Council and community stakeholders recognise that technological advancements in healthcare are essential for managing growth effectively. Technological solutions such as telehealth services and digital health management systems can effectively address their medical needs. This approach reduces the necessity for permanently stationed healthcare professionals, whose time might be underutilised due to the limited scale of demand. This approach aligns with the rising number of seniors (ages 70–84) and elderly (ages 85 and over) and acknowledges the importance of developing comprehensive care solutions.

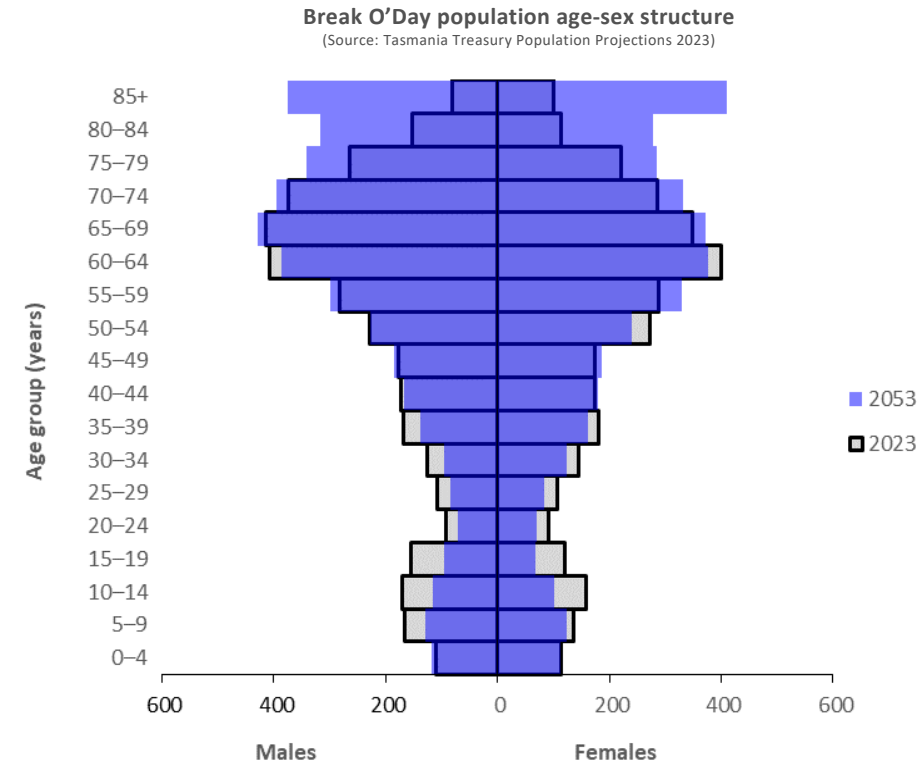
Through the Strategic Regional Partnership, the state government is committed to enhancing local healthcare. Initiatives such as community paramedics addressing non-emergency needs and prescribing medications are being explored. Upgrades to rural hospitals are also being considered to improve access to specialist consultations through virtual infrastructure and immediate advice from emergency doctors.

Through these strategic investments and collaborations, Break O'Day can create an environment that enhances residents' quality of life while fostering opportunities in healthcare provision and inclusive economic growth. This collaborative approach leverages the ongoing familial demographic shift, ensuring Break O'Day remains an attractive destination for families at various life stages and addresses the unique challenges and opportunities posed by an ageing population.

Population projections

The Tasmanian Department of Treasury and Finance provide population projections for the next 30 years. From 2023 to 2053, the population of the Break O’Day Local Government Area (LGA) is expected to increase by 10.2%, rising by 720 people to 7,795. This represents an average annual growth rate of 0.3%.

Although changes in our total population size seem modest over a 30-year period, the population age distribution is projected to change significantly. By 2053, the median age in Break O’Day is projected be 62.6 years, with 45.3% of our population aged 65 or older. This compares to 33.3% in 2023 and 17.2% in 2003. Similarly, the working age population (aged 15-64) is forecast to decrease from 54.7% in 2023 to 46.9% by 2038, and further to 45.7% by 2053, down from 63.7% in 2003.



As Break O’Day’s population grows and healthcare needs evolve over the next 5-10 years, there is a significant opportunity to develop targeted healthcare services. This will create jobs for local professionals, such as nurses, doctors, and health workers, ensuring our workforce is prepared for future needs.

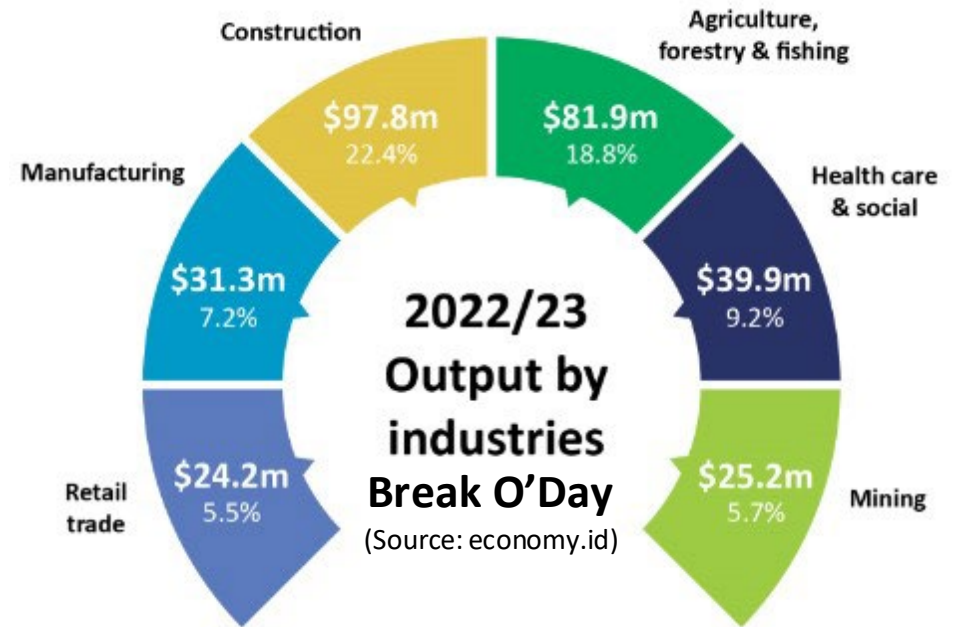


## Economy

Break O'Day's economic evolution over recent years reflects both growth and transformation across various sectors. The total industry value added of Break O'Day grew by 20.7% between 2016/17 and 2022/23, slightly lower than the growth rate of Tasmania state of 21.3% over the same period. Traditional sectors like agriculture and fishing maintained a steady contribution. However, industries such as administrative services and real estate services exhibited significant growth, with increases of 84.6% and 82.4% respectively, higher than Tasmania state growth of 36.8% and 24.8%. The industry value added of the professional services sector also increased by 129.0% in Break O'Day, roughly three times higher than that of the state of Tasmania of 43.4%.

Once the backbone of the local economy, primary sectors such as agriculture and forestry have witnessed fluctuations of both output and employment, leading to a considerable narrowing of the area's industry base. The region has transitioned largely into a service economy, catering to the needs of the local and regional population, as well as the growing visitor market. Data from 2016/17 to 2022/23 highlights significant shifts within Break O'Day's traditional resource-based sectors, revealing both challenges and areas of resilience.

Break O'Day's top six industry sectors by output, as categorised by the Australian and New Zealand Standard Industrial Classification (ANZSIC), are presented in the following figure.



In terms of value added by industry sector, agriculture, forestry and fishing accounts for the largest proportion (25.3%) of Break O'Day's industrial base. The value added of this sector is almost double that of the second top contributing sector, health care & social assistance. Within the agriculture, forestry and fishing sector, the following trends in value added have been overserved at the sub-sector level:

- **Agriculture** remains a cornerstone of the local economy, experiencing a 21.1% increase in value added from 2016/17 to 2022/23. Despite a notable decline in 2018/19, the sector rebounded throughout the COVID-19 pandemic, potentially attributed to increased reliance and promotion of Australian produce. This recovery indicates the sector's enduring importance to the region, though it also underscores the volatility that agriculture faces.
- **Aquaculture** has demonstrated robust growth, increasing by 93.1% over the past 6-years (2016/17-2022/23) highlighting its expanding



role in Break O'Day's economy. This sector, focusing primarily on oysters, has become increasingly vital, suggesting that further investment and promotion could bolster its contribution to the local economy.

- **Forestry and Logging** although data reports a significant decline over the past six years, dropping from a value added of \$4.8 million in 2016/17 to less than \$1 million in 2022/23<sup>2</sup>, it is important to acknowledge that several factors have influenced these results. This reduction marks the likely relocation of young softwood plantations from Break O'Day. The low level of value added may also reflect that, whilst forestry and logging organisations operate in the region, they are not based in Break O'Day. Nonetheless, the decrease in value added of this sector emphasises the need for economic diversification.
- **Fishing, Hunting, and Trapping** experienced a substantial decline, with a 31.4% decrease from \$8.6 million in 2016/17 to \$5.9 million in 2022/23. While the sector showed relative stability earlier in the period, peaking at \$11.9 million in 2018/19, the sharp decline in recent years suggests significant challenges, possibly related to environmental pressures, changes in fish stock availability, or economic factors affecting business profitability.
- **Support Services (Agriculture, Forestry, and Fishing)** have shown notable growth, with a 170.0% increase over the six-year period (2016/17-2022/23). Although starting from a low base, the sector's value added grew from \$1 million in 2016/17 to \$2.7 million in 2022/23. This growth reflects a rising demand for specialised services that support the primary industries in Break O'Day, possibly driven by increased mechanisation, technological adoption, or the need for more efficient resource management.

While traditional industries have faced fluctuations, agriculture remains a key pillar, with a 21.1% increase in value added from 2016/17 to 2022/23. Aquaculture has emerged as a strong growth sector, with a 93.1% rise in value added. In contrast, forestry and fishing have experienced declines, highlighting the need for economic diversification. Looking ahead, significant opportunities exist in emerging areas such as viticulture, with Break O'Day's cool climate and unique soil conditions creating ideal conditions for successful wineries.

Meanwhile, sectors across professional, scientific, and technical services, saw substantial growth in value added of 129.0% from 2016/17 to 2022/23, highlighting an ongoing shift towards a more diversified and service-oriented economy. These sectors were also influenced significantly by trends towards working from home, catalysed by COVID-19, whereby much of the largely white-collar workforce was forced to work from home, or in some cases, their holiday homes. This continued trend underscores the evolving economic profile of Break O'Day, balancing the legacy of its traditional industries with the potential expansion of new, high-value sectors that can emerge from a well-supported and enabled business community.

By comparison, Dorset Council, which borders Break O'Day to the northwest, has a largely similar industrial make up to Break O'Day. Much like Break O'Day, Dorset has begun its transition toward a more diversified economy, exploring renewable energy and innovative timber-related industries. Organisations like Dorset Renewable Industries (DRI) is spearheading community focused development that intends to use the region's renewable resources to improve the environment and build community resilience. Similarly, Sea Forest in Glamorgan-Spring Bay is an environmental technology company that specialises in cultivating seaweed and producing solutions to climate change.

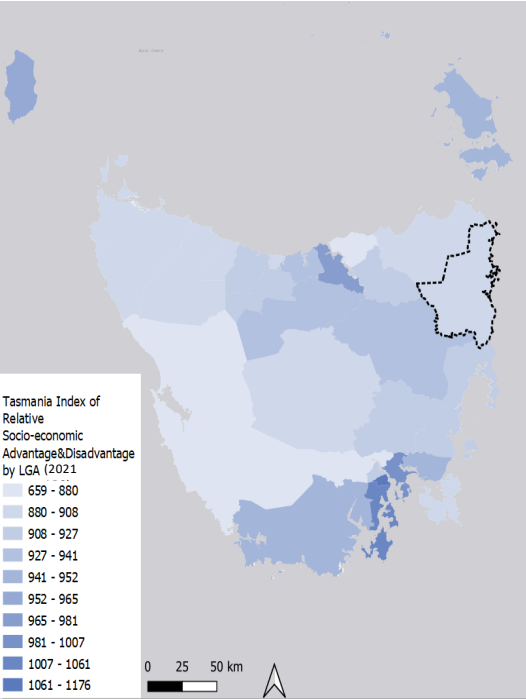
Looking forward, there is potential for Break O'Day to leverage emerging industries to stimulate economic growth. Supporting diversification within the agricultural and seafood industries, alongside efforts to enhance the

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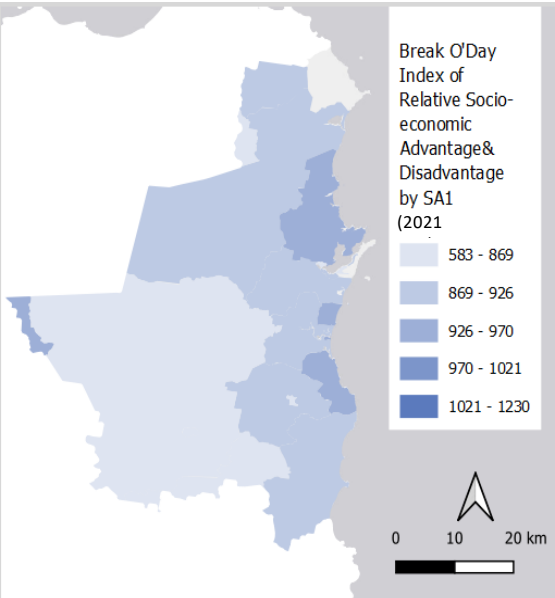
<sup>2</sup> Published figures are rounded to the nearest \$100,000. Some of the core Forestry activity may also have diverted to related support services.

service economy, could provide a more resilient economic base for Break O'Day, helping to mitigate the impacts of future economic shifts and ensuring long-term prosperity for the region.

Socio-economic advantage and disadvantage



As a comprehensive measure of the overall economic and social conditions of people and households within an area, the 2021 Index of Relative Socio-economic Advantage and Disadvantage (IRSAD) has been engaged and mapped to understand how Break O'Day compares to other LGAs in Tasmania. Lighter colours on the maps represent areas facing more significant socio-economic disadvantage. Break O'Day received an IRSAD score of 881, lower than the Tasmania average of 923. This places Break O'Day as one of the more disadvantaged LGAs (4<sup>th</sup> place out of 29) in Tasmania.



Comparisons within Break O'Day reveal that areas around St Helens, Binalong Bay, Beaumaris and Scamander, and wider coastal locations, have higher IRSAD scores, indicating that households in these areas are relatively advantaged on the IRSAD spectrum.

These findings highlight the need for strategic interventions to revitalise the local economy and address pockets of socio-economic disparity that have arisen.

## Visitor economy

Although not captured directly in ANZSIC, tourism is a fundamental component of the Break O'Day economy, contributing significantly to the local economy through visitor spending, employment, and business activity.

Break O'Day forms a vital part of Tasmania's tourism landscape and is renowned for its natural beauty, including pristine beaches, mountainous national parks, and cultural heritage sites. Visitor numbers have shown steady growth, with a mix of domestic and international tourists. The industry supports a range of businesses, from accommodation and dining to adventure and cultural experiences.

### Key attractions

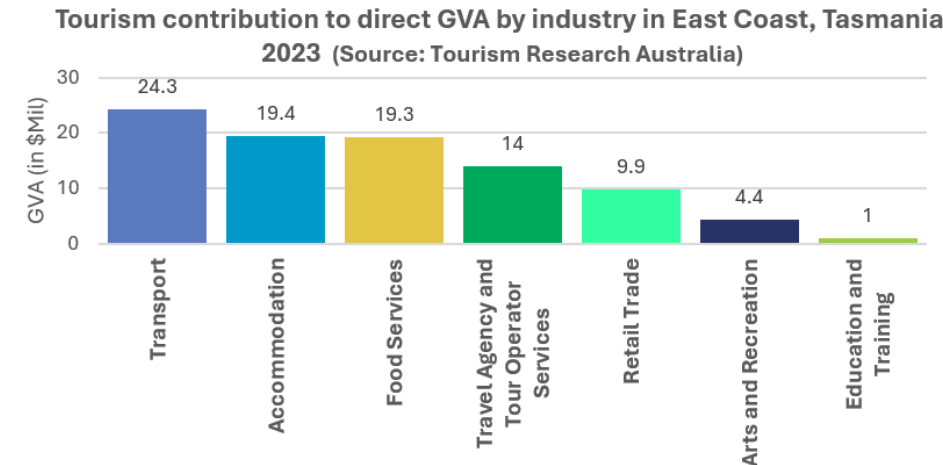
Break O'Day's diverse tourism offering includes affordable activities such as bushwalking and beachgoing, as well as high-end experiences such as wineries and luxury accommodation. Break O'Day's most popular tourist attraction, the Bay of Fires, ranks as the 9<sup>th</sup> most popular single attraction in the state, welcoming 196,000 annual visitors in the year ending June 2024.

Outdoor activities, including mountain biking, trail running, and walking, are becoming increasingly popular as adventure tourism and nature-based recreation continue to form key components of Break O'Day's visitor offering. These trends align with the broader regional patterns observed across the East Coast of Tasmania. According to Tasmania Visitor Data, the top four activities on the East Coast include pastimes, outdoor activities, day trips, and bushwalking.

## Tourism trends

Visitor numbers in Australia have gradually bounced back to pre-pandemic levels. As reported by Tourism Australia, the number of annual visitors was 7.4 million in June 2024, compared to 8.7 million in December 2019. Tasmania's tourism industry has also performed well in recent years. Tasmania welcomed 1.3 million visitors as of June 2024, only slightly lower than the pre-pandemic figure of 1.35 million in December 2019.

Tasmania Visitor Data reports that, for the year ending June 2024, the East Coast received 436,000 annual visitors, making up 33.5% of total visits to Tasmania. According to the East Coast Tasmania Tourism, the East Coast ranked first in terms of tourism significance among Tasmania's regions for the 2019/20 financial year. The tourism industry contributed an estimated \$197.6 million to the regional economy. The contribution of the top seven tourism-related industries is shown in the following chart.



### Visitor to Resident Ratio

East Coast Tasmania Tourism's Positive Impact Tourism Strategy and Plan reported the Visitor to Resident Ratio (VRR) of Tasmania's East Coast as 21.4 in 2022, meaning that there is 1 resident for every 21.4 visitors. This is much greater than the VRR of Greater Hobart of 2.4 in the same year. In addition, the VRR for the East Coast is expected to reach 41.4 in 2030.

Although high VRRs suggest a strong tourism industry on the East Coast, they also indicate significant level of pressure on local resources and infrastructure and represent a strong dependency of the local economy on tourism. High VRRs further imply a shortage of local staff within tourism and hospitality and underscore the need to carefully balance provision for visitor and resident/worker accommodation in the region.

### The future of tourism

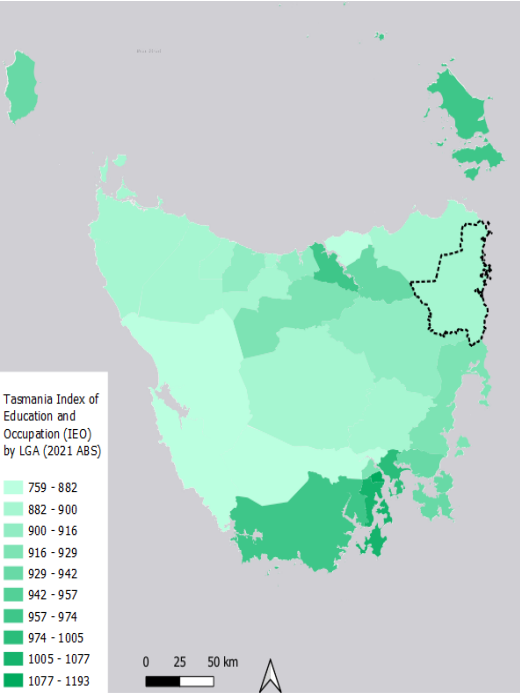
The national tourism outlook is positive, with Tourism Research Australia forecasting a 31% increase in tourism spending over the next five years, reaching 61% above pre-pandemic levels. This projection presents strong potential for growth in regions like Break O'Day. By expanding adventure tourism offerings and attracting high-yield visitors, Break O'Day can diversify its tourism base and create a more resilient, year-round economy.

However, Break O'Day's visitor economy faces several challenges, including managing seasonal fluctuations in visitor numbers, addressing staffing shortages, and ensuring adequate infrastructure and housing to accommodate visitors. In addition, balancing tourism growth with the preservation of the region's natural environment is crucial, as our natural beauty is a key attraction for visitors. Addressing these challenges with sustainable solutions will further enhance the region's tourism appeal, benefiting visitors, the community, and the local economy.





# Skills & occupations



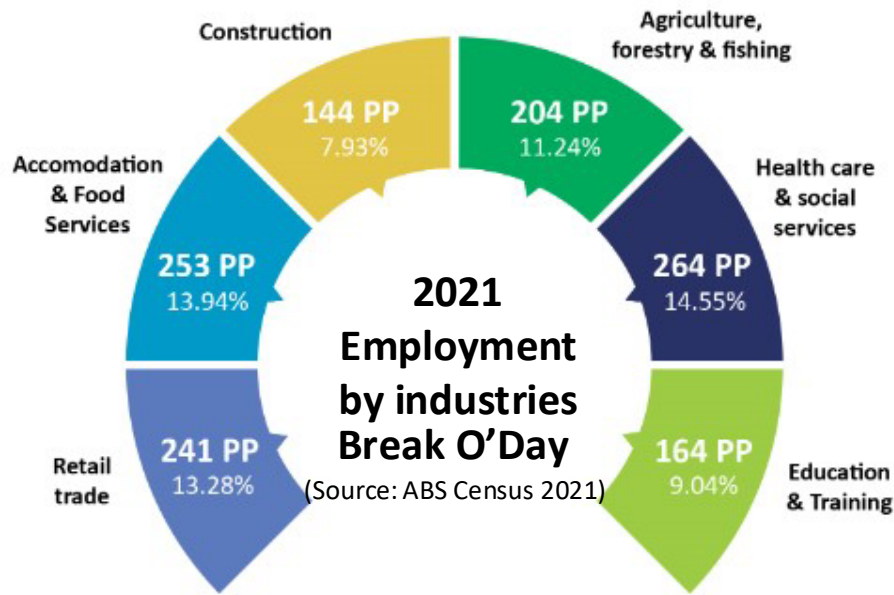
In Break O'Day, 24.4% of our residents possess a vocational qualification, surpassing Tasmania's average of 21.9%. Labourers form a significant portion (15.4%) of the workforce in Break O'Day, followed by technicians and trades workers (14.9%), managers (14.7%), and community and personal service workers (14.1%). These percentages are all above the Tasmania state averages for the respective occupations (11.3%, 13.9%, 12.7%, and 13.6%). Whilst this suggests a strong base of practical skills in the region, individuals aged 55 to 75 represent a significant proportion of these figures. This

highlights a potential challenge as many of these skilled workers are approaching retirement age. This situation underscores the need for knowledge transfer and workforce upskilling to ensure these capabilities continue to support local industries and attract new businesses seeking skilled labour in the long term.

In terms of higher education, 13.4% of residents have a bachelor's degree or higher, lower than the Tasmania state average of 21.9%. The 2021 Index of Education and Occupation (IEO) reflects the educational and occupational level of communities. Break O'Day has a IEO score of 896. Although ranked the 12<sup>th</sup> out of the 29 LGAs in Tasmania, the score is slightly lower than the Tasmania average of 919, indicating a relatively lower education and occupation levels compared to the rest of Tasmania. This further accentuates the need for investment in educational programs and vocational training to enhance workforce skills.

# Industries & businesses

## Employment by industries



Break O'Day's employment landscape is diverse, with service-oriented sectors dominating the job market in terms of people (PP). Health care and social assistance, accommodation and food services, and retail trade account for approximately 41.8% of local jobs, highlighting the importance of these sectors in our local economy.

At the sub-sector level, pre-school and school education (8.3%), food and beverage services (7.9%), and agriculture (7.3%) are the leading employers. Since the last Census, significant growth in medical and other health care services (36 new jobs), food and beverage services (33 new jobs), and construction services (31 new jobs) reflects increasing demand, likely driven by demographic shifts and economic needs.

Although the Australian Bureau of Statistics (ABS) classification does not define tourism as a standalone industry, it forms a significant proportion of Break O'Day's employment base. East Coast Tasmania Tourism estimated that 2,213 people were directly employed in the tourism industry on the East Coast in 2019/20, with a further 821 people employed indirectly.

### Location Quotient (LQ) Analysis

Location Quotient (LQ) is a statistical measure used to analyse the concentration of a particular industry, occupation, or demographic group within a specific geographic area compared to a larger reference area. In the context of geographical industry concentration, a LQ of 1.0 indicates that Break O'Day's share of total employment in an industry is equal to the proportionate share of total employment for Tasmania, whereas a value greater than 1.0 reveals a degree of region specialisation. Anything below 1 indicates the sector is underrepresented relative to the state average.

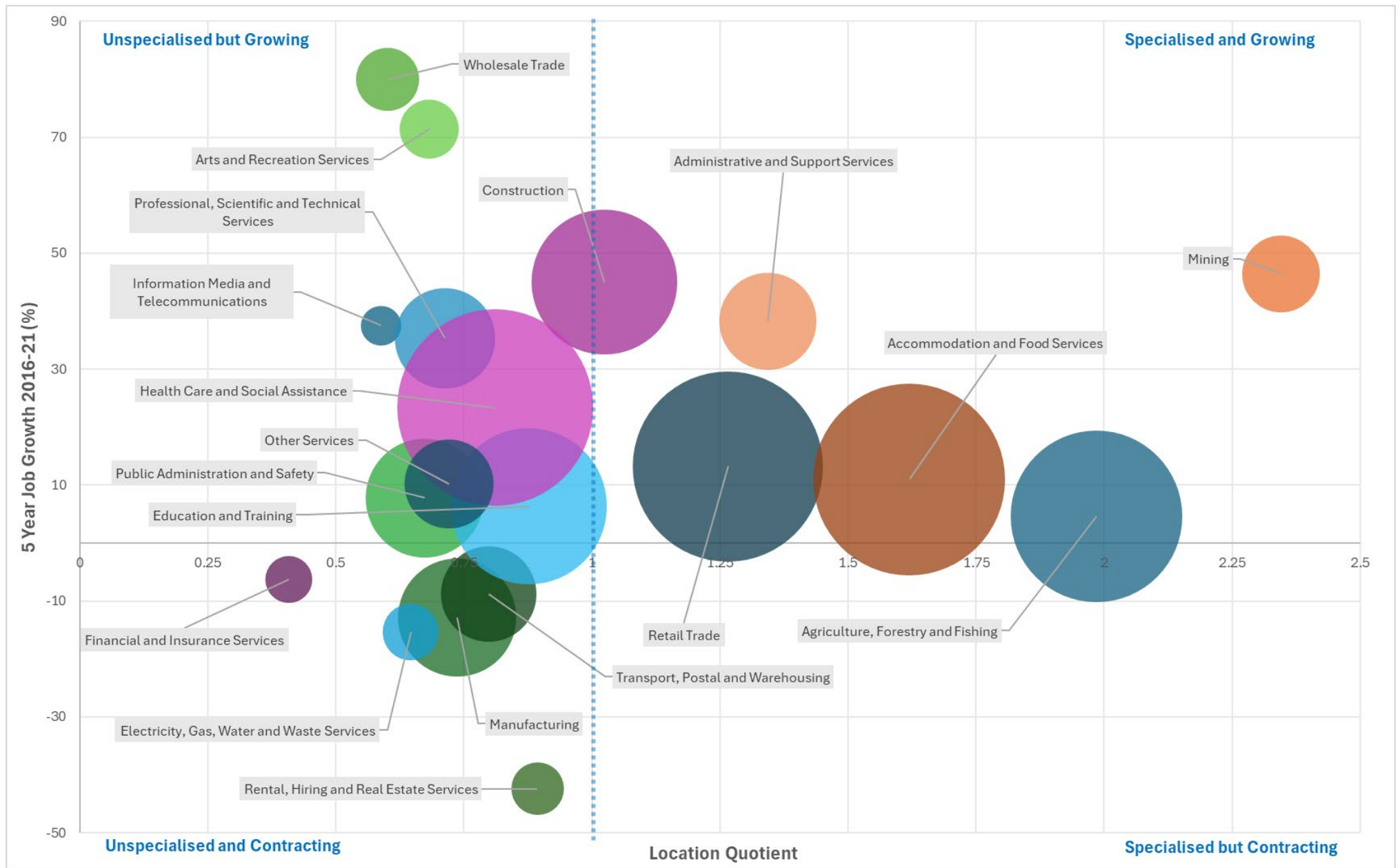
The figure below presents a LQ analysis measuring Break O'Day's industrial specialisation relative to Tasmania using ABS Census data. LQ are presented on the x axis, growth in employment from 2016-21 on the y axis, and the size of the data points presents the total sector employment in Break O'Day.

Break O'Day has a number of industrial focuses, indicated by an LQ greater than 1.0. Interestingly, all sectors with a LQ above 1 also experienced growth in employment between 2016-21. These sectors include:

- **Mining (LQ = 2.35)** Though small in absolute employment, a high LQ signals a strong regional specialisation. It should be noted that although Census data reports a significant growth in employment in the mining sector from 2016-21, consultation with mining operators in Break O'Day revealed that businesses do not report the same findings in terms of employment growth.
- **Agriculture, Forestry, and Fishing (LQ = 1.99)** A highly specialised and growing sector in Break O'Day, reflecting the importance of agriculture, as well as developing sub-sectors like aquaculture, as key pillars of the local economy.
- **Accommodation and Food Services (LQ = 1.62)** A clear indicator of tourism's significance in Break O'Day. This sector is the second largest employer in Break O'Day and experienced growth in employment numbers of between 2016-21.
- **Administrative and Support Services (LQ = 1.34)** Although smaller in absolute employment, a LQ above one and growing employment base suggests a developing sector with growing regional importance.
- **Retail Trade (LQ = 1.27)** The third largest sector in terms of employment and a degree of regional specialisation reflects the importance of consumer-driven industries in Break O'Day.
- **Construction (LQ = 1.02)** Representing a sizeable proportion of Break O'Day's employment footprint, construction accounts for a similar proportion of the region's employment base as it does for Tasmania.

There are several sectors that are not considered specialised within Break O'Day (i.e.  $LQ < 1$ ) relative to the Tasmania average but experienced significant growth between 2016-2021.

- **Health Care and Social Assistance (LQ = 0.81, +23.4% growth)** Although slightly below the national representation level, this sector is the largest employer in Break O'Day and continues to grow, reflecting rising demand for aged care and health services.
- **Professional, Scientific, and Technical Services (LQ = 0.71, +35.3% growth)** Strong growth suggests increasing demand for professional services in Break O'Day, potentially reflective of remote work and online business opportunities.
- **Arts and Recreation Services (LQ = 0.68, +71.4% growth)** While still a small employer, this sector has seen rapid growth, likely driven by increased tourism activity, cultural initiatives, and outdoor recreation opportunities.
- **Wholesale Trade (LQ = 0.60, +80.0% growth)** Traditionally a small industry in the region, this significant growth suggests supply chain expansions in key sectors.
- **Information Media and Telecommunications (LQ = 0.59, +37.5% growth)** While still a small employer, this sector's expansion in employment may reflect the increasing importance of digital connectivity.



## Businesses by industries

In 2021, Break O'Day had 525 businesses, a 11.7% increase from 2016, falling behind Tasmania's growth rate of 15.5%. This growth was primarily driven by a 24.3% rise in sole trader businesses (nil employees), indicating a vibrant entrepreneurial spirit in the region.

The most significant increases in business numbers were in health care and social assistance as well as arts and recreation services. The observed increases in business numbers are cross validated by increasing number of employees in the respective industries. These trends likely reflect the ageing population, in that there is a rising demand for health and social services and pursuing leisure activities.

Rental, hiring, and real estate services also saw an increase in business numbers, with five small businesses (1-19 employees) in 2016 and three additional sole trader businesses (nil employees) recorded in 2021. However, the number of employees within this industry reduced from 28 in 2016 to 20 in 2021. This observation suggests a fragmentation of the industry, with smaller, or sole trader, businesses emerging rather than a few larger employers.

Construction and professional, scientific, and technical services also experienced strong growth in terms the number of businesses and employees. In the construction industry, the number of small businesses (1-19 employees) has doubled between 2016 and 2021, increasing from 25 to 51. Similarly, in the professional, scientific, and technical services industry, the number of sole trader businesses also doubled, rising from 18 in 2016 to 37 in 2021. Along with the observed increase in the employees in the respective industries, these findings indicate a robust demand for infrastructure and expertise-driven services, with a trend towards smaller and specialised firms.

**68%**

of local businesses  
are *Sole Trader* in  
2021 – the major  
players in the local  
economy and job  
market.

However, sectors such as agriculture, forestry and fishing, manufacturing, and transport, postal, and warehousing have experienced a recent decline, reflective of a general trend towards fewer and smaller businesses. Although the sole trader business base remained relative stable from 2016 to 2021.

To support economic development, Break O'Day needs to collaborate with state and local stakeholders to align educational initiatives with industry demands, ensuring that the local workforce is equipped to meet future economic opportunities. Enhancing digital connectivity and fostering technological innovation can support businesses in both emerging and traditional sectors. Additionally, tailored support for growing industries and strategic efforts to attract and retain skilled workers will be essential in driving sustainable economic growth and improving the overall quality of life in Break O'Day.



## Workplace & income

### Employment

In 2021, Break O'Day's labour force comprised 2,523 individuals, representing 42.7% of the population aged 15 and over. The regional unemployment rate decreased from over 11.0% in 2016 to 7.4% in 2021. However, this rate remained higher than Tasmania's overall unemployment rate of 5.9%.

In terms of youth employment, although the number of young people (aged 15-24) declined between 2016 and 2021, the proportion of young people employed saw a notable increase, with 51.2% of individuals aged 15-24 employed in 2021, up by 9.3% from 41.9% in 2016. This suggests that our local economy is creating more job opportunities for young people and that young people are more successfully moving from education into the workforce.

**51.17%**  
Youth employment  
rate (2021)

Between 2016 and 2021, employment patterns have shifted across different sectors and age groups. Service sectors such as healthcare, retail, and accommodation and food services have increased their hiring of workers under 40 years old. This suggests that certain sectors are actively engaging young and mid-career talent to meet evolving skill demands and to adapt to new technologies and digital processes. In contrast, sectors such as construction, professional services, scientific and technical fields, and education and training have seen an increase in employees aged over 40.

### Income

Median personal weekly income for full-time employees in Break O'Day ranged between \$800-\$999 (\$41,600-\$51,999 p.a.). The median weekly income of \$836 in Break O'Day is lower than that of the Tasmania state of \$1,358.

In terms of the cost of living, ABS publish five Living Cost Indexes (LCIs) that measure the price change of goods and services and its effect on living expenses. Over the twelve months to the September 2024 quarter, the LCIs rose between 2.8% and 4.7%. Although increases in living costs have continued to slow since late 2022, the LCI increases mark ongoing financial pressure for households all over Australia.

The 2021 Index of Economic Resources (IER) assesses the financial aspects of relative socio-economic advantage and disadvantage. It does so by summarising variables related to income and housing. Break O'Day has a score of 930, ranking it in decile 2 for economic disadvantage. This score implies that Break O'Day has fewer households with higher income and relatively lower access to economic resources, excluding the impacts of liquid assets (i.e., savings and equities), education, and occupation<sup>3</sup>.

### Social services and benefits

As of 2021, 9.5% of Break O'Day's population were on unemployment-related benefits - Jobseeker Payment, and 1.84% claimed for low-income card. Both are higher than Tasmania average (4.9% and 1.1%, respectively). In addition, 22.1% were on age pension, exceeding the Tasmania average of 14.5%.

<sup>3</sup> IER excludes education and occupation variables as they are not direct measures of economic resources. It also excludes assets such as savings or

equities which, although relevant, cannot be included as they are not collected in the Census.

## Infrastructure

### Internet access

The Australian Digital Inclusion Index reports on digital access and usage across Australia. It uses survey responses to measure digital inclusion across the three dimensions of access, affordability and digital ability. Break O'Day recorded a digital inclusion index of 63.9 in 2022. This compares to the national average of 73.2 and state average of 70.0.

Although household internet access was not included in the 2021 Census due to increased mobile internet usage on personal devices outside of the home, data from the 2016 Census indicated that 66.6% of Break O'Day households had access to an internet connection. This was slightly lower than the Tasmania average of 74.4% and the national average of 78.8%. Providing wider internet coverage and more stable internet connection is crucial to enable remote work for a wide range of professions. Whilst this highlights the challenges of digital infrastructure in Break O'Day, it is worth noting that regional demographics and housing stock might account for some of this disparity. For example, an ageing population will likely reduce an area's demand for digital infrastructure.

Similarly, a high proportion of second homes or places of non-permanent residence may mean an area doesn't require the same level of digital connection.

### Travel and commuting

The 2021 Census recorded that 79.3% of usual residents (1,780 pp) commute within Break O'Day rather than outside the region every day. In terms of vehicle ownership, 95.5% of households in Break O'Day had access to motor vehicles, with 59.6% households owning two or more vehicles. This is comparable to the state average of Tasmania.

In terms of method of travel to work in Break O'Day, car (66.7%) is the primary method of commuting, followed by work from home (11.7%) and active transport modes (including walking and cycling), accounting for 5.9%. As expected for a regional area, only 0.1% people in Break O'Day took public transport, specifically bus services, lower than Tasmania average of 3.0%.



## Housing

At the time of the 2021 ABS Census, 68.3% of dwellings in Break O'Day were privately occupied, lower than the Tasmania state average of 88.5%. Additionally, 31.3% of dwellings in Break O'Day were unoccupied, exceeding the Tasmania state average of 11.3%. Unoccupied dwellings often suggest that dwellings are not the primary residences of their owners. This therefore indicates a significant portion of Break O'Day's housing stock is made up of holiday homes.

In terms of dwelling type by the number of bedrooms, three-bedroom dwellings account for 47.3% of dwelling structures in Break O'Day, followed by two-bedroom dwellings at 25.2% and four-bedroom dwellings at 13.3%. These findings closely align with the Tasmania state average, where three-bedroom dwellings account for 47.8%, two-bedroom dwellings for 19.9%, and four-bedroom dwellings for 17.8%. Given Break O'Day's ageing population, diversification of the local housing offer is required to meet the needs of an evolving population who, for example, may not require dwellings with multiple bedrooms.

In Break O'Day, a significant 50.8% of households fully own their homes, surpassing Tasmania's rate of 35.8%. This high rate of home ownership is likely attributable to the ageing population, who are more likely to have paid off their mortgages.

The median monthly mortgage payment in Break O'Day has risen to nearly 30% of weekly household income, up from about 28.2% in 2016, indicating a slight increase in the financial burden of homeownership for those with mortgages.

**\$355K - \$967k**  
Median Housing Price Range  
(2024)

While property rental prices in Break O'Day have been increasing at 4.0% annually, outpacing income growth of 2.4% per year, they remain below the 30% threshold of household income used by ABS to measure housing affordability.



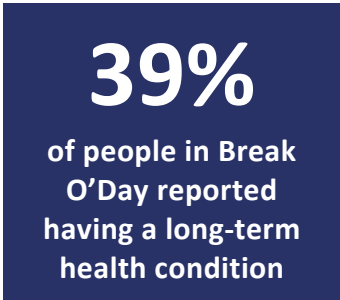
# Appendix B: Policy and Strategy Analysis

## Workforce upskilling

A skilled working population is important for our economy to stay competitive and relevant. This is a key objective of several local and regional strategies and plans, namely, the Break O’Day Strategic Plan 2017-2027 and Strategic Regional Plan for Tasmania 2023. These plans emphasise the need for training and skill development programs to create a well-equipped future workforce. Through improved access to educational institutions that cater to a variety of qualifications, Break O’Day can become more attractive to young people. In addition, the network evaluation approach of the Jobs Tasmania Regional Jobs Hubs focuses on understanding and addressing regional needs and skill shortages in key sectors. Both this initiative and the Break O’Day Economic Development Strategy aim to enhance local employment and training opportunities through data-driven insights and stakeholder feedback.

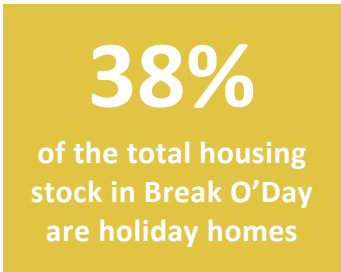
## Health

Good health is vital for economic productivity. When people receive timely medical care, they recover faster from illnesses, reducing absenteeism from work. Healthy workers are also more productive, leading to increased economic output. The healthcare in Break O’Day is currently insufficient to meet the needs of our ageing population. As reported by ABS in the 2021 Census, Break O’Day has a median age of 56 (compared to 38 in wider Australia) and a higher proportion of people reporting one or more long-term health conditions (39%) than the Australian average (28%). A diversity of health facilities, including specialist medical and emergency services, and disabled and aged care facilities, is needed within the region due to long travel distances to major centres.



## Housing provision

Social and affordable housing generates positive wellbeing, health and productivity outcomes for individuals and contributes to the effective functioning of society. This is achieved by facilitating population growth, building community cohesion, increasing connectivity to employment and essential services, and driving demand for local construction business. The challenge for Break O’Day is that holiday homes represent a large proportion of the total housing stock (38% in 2015). According to Break O’Day’s Land Use and Development Strategy 2015, 55% of residents believing there is inadequate housing, and a lack of affordability for young people. This leads to ownership being disproportionately amongst the elderly and constrains population growth. Underpinned by effective land use zoning, greater diversity in housing stock that reinforces valuable local character is a priority initiative.



## Sport and recreation

A thriving recreational environment makes an area more appealing for people to live and work, fostering economic growth. In Break O’Day, there is a growing demand for additional recreational facilities, such as indoor gyms and pools, to support year-round activity. The Land Use and Development Strategy for Break O’Day highlights the need for public open spaces to meet local community needs. Recent projects the Council has sought community feedback on include a youth park, pump tracks, aquatic facilities, and outdoor exercise equipment, all aimed at addressing this demand.



## Tourism

A growing visitor economy helps to create jobs, diversify economies, promote and develop new attractions and infrastructure. Break O'Day's tourism industry, particularly in transport and accommodation, provides a significant proportion of jobs in the local economy. This follows recent trends of our region becoming more of a service-based economy and declining in the traditional resource-based sectors.

However, the seasonality of tourism, as detailed in the Break O'Day Tourism Development Strategy 2012-2017, means it cannot be relied on for year-round economic performance. To smooth this, additional attractions, investment in business diversification, creation of a positive brand, and strategic partnerships could be pursued to complement existing sectors and the region's unique character.

**5%**  
of the workforce is  
employed in the  
accommodation  
sector

## Resilience building

A resilient economy tends to endure shorter and less severe downturns, thus maintaining a stable employment base and promoting greater investment. An economy is considered resilient if it is diversified and not reliant on a singular industry, is adaptable to change and external shocks, and has robust physical, digital and social infrastructure.

The Break O'Day region is prone to flooding with the last severe incident occurring in February 2024. This cut off power and roads to St Helens (ABC News). By diversifying local industry, volatility can be managed, as well as ensuring needs of the population can be met by local supply in times of natural disaster or otherwise. Further diversification within agriculture, forestry and fisheries is supported by state and federal policy. Evidenced by the Strategic Regional Plan for Tasmania and the National Reconstruction Fund providing finance for projects that add value to these sectors.

## Transport connectivity

Extensive and efficient transport infrastructure is essential for well-functioning communities and their economy. As well as robust road infrastructure, public and active transport offers significant benefit to communities and industry. Break O'Day's existing public transport infrastructure consists of several bus routes that connect to regional centres. Primary bus routes include St Helens to Hobart, St Helens to Launceston, Coles Bay and Bicheno to St Marys and St Helens, and Coles Bay and Bicheno to Launceston via St Marys. Although challenging for regional areas such as Break O'Day, greater provision of coordinated passenger transport resources increases access to employment and essential services. In addition, improvements in freight transport supports businesses and key supply chains.

This is a focus of the Transport Master Plans (2013) and Traffic Management Strategies (2015) for Break O'Day, which discuss enhancing road, rail and air transportation between regional centres and among the broader region. Key areas covered include road safety, active and public transport, and growth management (in terms of traffic and parking).

## Digital connectivity

The Federal Government recognises the importance of internet access, as evidenced by the statement, "Improvements in digital connectivity deliver some of the most tangible and widespread benefits across a huge range of areas including economic and social participation and equality, access to online government, health and education services, and public safety including on roads and during disasters and emergencies" (DITRCA). Australia-wide in 2016, nearly 80% of all households had internet access, compared to 67% in Break O'Day (ABS). Although this data may be influenced by holiday accommodation and demographic tendencies (the digital literacy of an ageing demographic), there is a recognised need to improve internet access amongst Break O'Day's communities.

**67%**  
of households in  
Break O'Day have  
access to the internet

## Appendix C: Stakeholder and Community Engagement

### One-to-one engagements:

The stakeholder engagement process began with in-depth one-to-one conversations with organisational stakeholders operating in Break O'Day. By engaging with these organisations individually, the sessions facilitated open and candid discussions. This approach enabled a deep dive into the unique and nuanced issues each organisation faces, ranging from economic challenges and infrastructure needs to environmental concerns and community wellbeing. A list of one-to-one participants is provided below:

- AusIndustry
- Break O'Day Business Enterprise Centre
- Break O'Day Employment Connect
- Break O'Day Chamber of Commerce and Tourism
- Cornwall Coal
- East Coast Tasmania Tourism
- Fingal Valley Neighbourhood House Inc.
- Lease 65
- Medea Park Residential Care
- North East Bioregional Network
- Regional Development Australia, Tasmania
- St Helens Hospital
- Sustainable Timber Tasmania

These engagements helped the strategy's authors understand the region's dynamics more clearly. They provided invaluable insights that informed the development of core themes for the wider workshop sessions. Through these direct dialogues, our aim was to ensure that the strategy not only capitalises on the theoretical principles but is also firmly rooted in the practical realities

and opportunities unique to Break O'Day. This foundational step was essential in crafting a responsive and effective Economic Development Strategy, tailored to meet the diverse needs and aspirations of the local community and its stakeholders.

### Economic conversation workshop 1

The first economic conversation workshops for the Break O'Day Economic Development Strategy took place in June 2024. These workshops were held in St Marys/Fingal Valley and St Helens. The workshop involved stakeholders from various groups, including local businesses, community groups, Council, and the Chamber of Commerce.







**Economic Conversation Workshop 1 St Helens (Left) & St Marys (Right)**

The first round of workshops achieved the following:

- Validated the foundational baseline analysis of Break O'Day's economic landscape.
- Gathered insights and feedback from organisational, business, and community stakeholders.
- Commenced the formulation of an initial action plan.
- Ensured alignment with the diverse needs and aspirations of the Break O'Day community.

## Summary of initial stakeholder engagement

Following the initial stage of the stakeholder engagement process, including the one-to-one engagements and first economic conversation workshop, a “What We Heard” report was developed to summarise insights of key organisational stakeholders. A summary of these stakeholder insights is provided below:

|  Industry development   |  Infrastructure   |  Natural environment  |  Community wellbeing  |
|--|--|--|--|
| <ul style="list-style-type: none"><li>• <b>Industry Diversification:</b> Diversify the local industrial make-up, both within existing sectors and into new sectors.</li><li>• <b>Education Enhancement:</b> Improve education and vocational training facilities to align with local industry demands to boost employability.</li><li>• <b>Community Revitalisation:</b> Utilise empty spaces and repurpose vacant properties to energise the local economy.</li><li>• <b>Skilled Workforce Attraction:</b> Improve amenities and offer incentives to attract skilled professionals.</li><li>• <b>Industry Innovation:</b> Enhance economic resilience through the integration of technology in existing industries such as in agricultural and fishing practices.</li></ul> | <ul style="list-style-type: none"><li>• <b>Housing Diversification:</b> Improve housing accessibility and develop affordable housing options for skilled workers.</li><li>• <b>Transportation Connectivity:</b> Enhance transport infrastructure to support residents, businesses and visitors.</li><li>• <b>Digital Connectivity:</b> Upgrade digital infrastructure for reliable, high-speed access that supports residents and local businesses.</li><li>• <b>Infrastructure Sustainability:</b> Balance infrastructure development with environmental conservation.</li><li>• <b>Community Engagement:</b> Involve the community in planning through consultations to ensure interventions meet local needs.</li></ul> | <ul style="list-style-type: none"><li>• <b>Environmental Degradation:</b> Address pollution and habitat loss by promoting sustainable practices in industry.</li><li>• <b>Resource Overuse:</b> Encourage sustainable resource management to combat overexploitation in primary industries and protect ecosystem health.</li><li>• <b>Environmental Awareness:</b> Implement educational programs to raise community awareness about conservation and environmental issues.</li><li>• <b>Climate Change Impacts:</b> Develop climate resilience plans to proactively prepare for risks associated with extreme weather and biodiversity changes.</li></ul> | <ul style="list-style-type: none"><li>• <b>Healthcare Accessibility:</b> Expand access to healthcare services and attract and retain skilled professionals.</li><li>• <b>Affordable Housing:</b> Collaborate with private developers, state government and community housing providers to support affordable housing projects and increase availability for low-income residents.</li><li>• <b>Community Infrastructure:</b> Invest in and maintain recreational facilities and public spaces to enhance social interaction and quality of life.</li><li>• <b>Education and Training:</b> Collaborate with education institutions to enhance access to training and education programs</li></ul> |

## Community engagement survey

As part of the Break O'Day Economic Development Strategy consultation process, a community engagement survey was designed and released to residents, businesses and visitors to gather valuable community insights.

This survey was developed to:

- Identify the strengths and challenges within our community.
- Explore economic opportunities, including business diversification, investment in education & training and infrastructure improvements.
- Understand the needs and preferences regarding local amenities, services and business operations.
- Gather input on initiatives that can support our local businesses, entrepreneurs and the broader community.

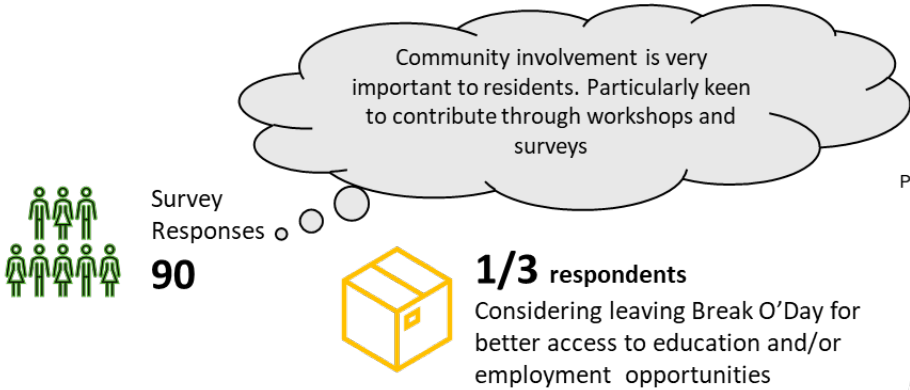
This survey was distributed via email to the business community, posted online on community pages and printed as physical copies. The survey was published on the 13th August 2024 and closed on the 6th September 2024. The full community engagement survey is included in **Appendix D**. A total of 113 responses were received, including 90 residents and 23 businesses.

The survey results for residents and businesses are summarised in the following two infographics. A detailed breakdown of responses, categorised into the four overarching themes, is also provided beneath.

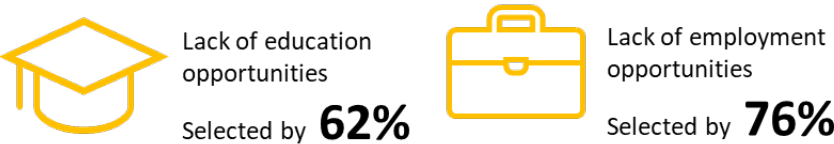




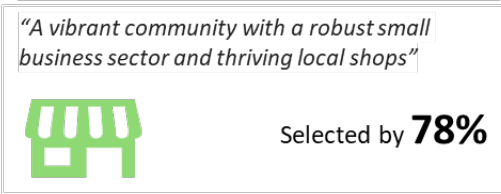
Resident responses



Primary reason young people are leaving Break O'Day:

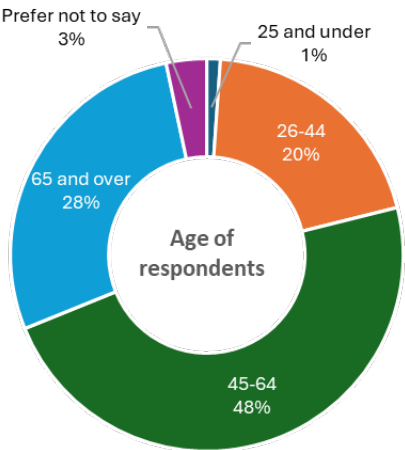


What should our economy look like in 20 years?

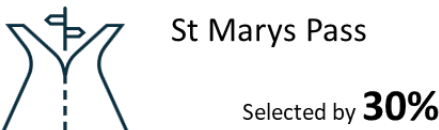


What will determine our economy's success in 20 years?

|  |     |
|--|-----|
| Good access to healthcare and wellbeing facilities   | 87% |
| Significant employment and educational opportunities | 62% |
| Good access to public services and amenities         | 46% |
| Significant recreational and cultural activities     | 36% |
| A sustainable and environmental focused approach     | 38% |



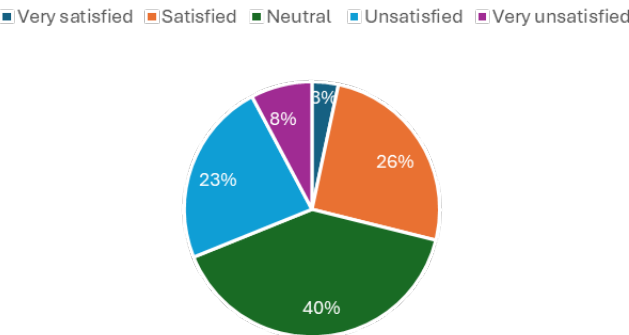
Area of road network that needs upgrading:



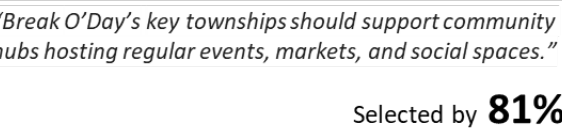
Break O'Day strengths:



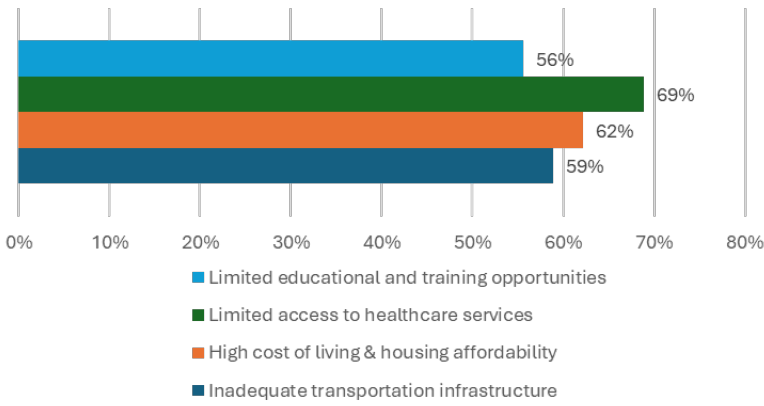
Housing Market Satisfaction:



How would you like to see our town centres used?



Biggest barriers to economic growth & development:



## Business responses



Survey  
Responses  
**23**

Businesses would like to collaborate with local government on infrastructure and development projects & through business advisory groups or committees

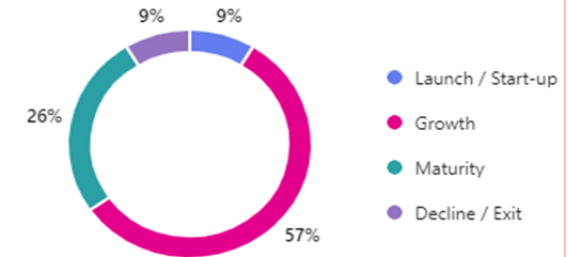
### Primary actions to improve recruitment and retention

Greater provision of regional worker accommodation

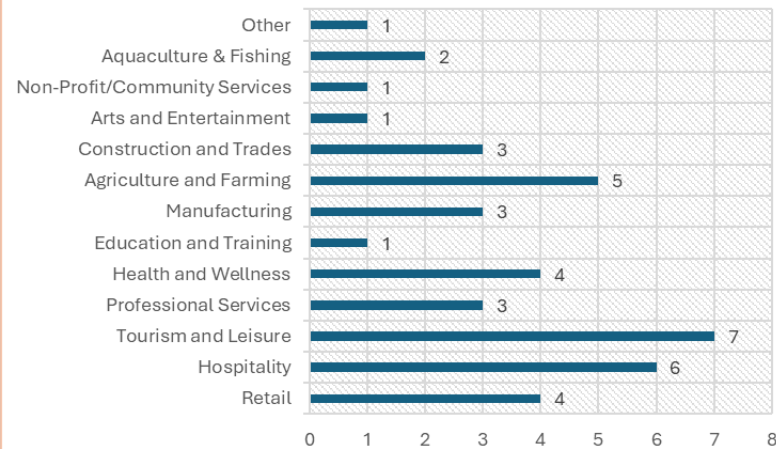


Selected by **11**

What phase of growth are you currently in?



### Type of business by no. of respondents:



### Primary challenges facing local businesses

Finding and retaining skilled labour



Selected by **13**



Seasonal fluctuations

Selected by **12**

### What skilled labour or workforce development programs would benefit your business the most?

- Apprenticeship programs
- Customer service & sales training
- Industry-specific qualifications
- Continuing education & upskilling

### What will determine our economy's success in 20 years?

|  |     |
|--|-----|
| Good access to healthcare and wellbeing facilities   | 61% |
| Significant employment and educational opportunities | 65% |
| Good access to public services and amenities         | 52% |
| Significant recreational and cultural activities     | 43% |
| A sustainable and environmental focused approach     | 39% |

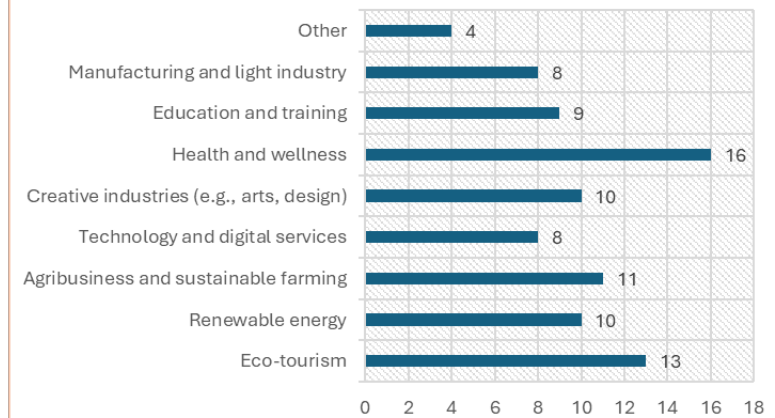
### What infrastructure improvement would most benefit your business?



Improving road and transportation networks

Selected by **65%**

### Industries/sectors to target by no. of respondents:



## Resident Responses

The resident survey responses reveal a diverse age range among participants, with the largest group aged 45-64 (48% respondents) and a significant number aged 65 and over (28%) and in the 26-44 age bracket (20%). Most participants have lived in Break O'Day for over 10 years (57%), followed by 1-5 years (22%) and 5-10 years (20%).

## Industry Development

### Business Diversification:

Residents selected a range of industries to target to diversify the local economy. A significant portion (78%) of residents believed that the health and wellness industry should be prioritised for development in Break O'Day, this was followed by education and training (59%), eco-tourism (53%), agribusiness and sustainable farming (43%), and the creative industries (40%).

### Healthcare

When asked what will determine our economic success in 20 years, the top response (selected by 87% residents) was good access to healthcare and wellbeing facilities. 72 out of 90 responses (80%) selected healthcare services as a key amenity/service that is currently lacking in the Break O'Day and highlighted it as a key improvement area. Residents also identified health and wellness as the top industry to target in the future, highlighting the potential of the new hospital in St Helens. The community therefore views health and wellness as both a critical success factor and a strategic opportunity.

### Skilled Workforce:

30% of respondents said they were either "Unsatisfied" or "Very Unsatisfied" with the current job opportunities available in Break O'Day. Residents selected apprenticeship programs (64%), continuing education & upskilling (56%), and digital and Information Technology (IT) skills training (50%) as the top training programs that would benefit employment opportunities.

## Infrastructure

### Transport & Digital Infrastructure Improvements:

The community identified several key areas of desired infrastructure improvements. The quality and condition of roads were noted as significant concerns, with St Marys Pass mentioned in 30% of responses. Residents had a relatively split opinion on Break O'Day's digital infrastructure. A similar percentage reported being satisfied and unsatisfied with internet connectivity. Capitalising on opportunities to improve public and active travel networks was suggested to attract businesses and support economic development.

### Housing and Accommodation:

When asked about housing in Break O'Day, 31% stated they are either "Unsatisfied" or "Very Unsatisfied" with the current local housing market. Respondents indicated the need for more diverse housing options in the region, particularly for key workers, seasonal employees and older residents. The high cost of living and housing affordability was also reported as a concern by 62% of respondents. To improve access to housing, residents saw the most value in developing more housing units (51% of responses), exploring options for key worker accommodation (46%), exploring options around seasonal employee accommodation (44%), and increasing funding for housing initiatives (41%).

Residents expressed some concerns about social housing in Break O'Day. Half of respondents said a primary concern is surrounding availability. To improve social housing, 44% of respondents would like to see increased supply, 34% advocate for better quality and maintenance, and 31% are calling for more strategically located housing near transport links and schools.

## Natural Environment

### Natural Assets:

Residents strongly expressed the value they place on our natural assets. 96% of residents reported "Beautiful natural surroundings and environment" as a key strength of Break O'Day. Participants also recognised tourism as a significant area for growth, particularly eco-tourism.

## Community Wellbeing

### Youth and Education:

A significant portion of respondents expressed concerns about youth opportunities, with a strong desire for improved educational facilities and vocational training programs to help prepare young people for local employment opportunities. A point of particular concern amongst the community is the educational offerings and lack of in-person teaching for years 11 and 12.

One third of residents said they, or their family, are considering leaving Break O'Day for better access to education and/or employment opportunities. Both residents and businesses identified apprenticeship programs as the top priority for training provision to support employment and entrepreneurship in the area. Some residents also noted a lack of local childcare provision.

### Town Centre Activation:

Survey results indicate that most respondents use the St Helens and St Marys town centres primarily for commercial and retail services (89%), followed by social and recreational activities (66%) and for public services and facilities (58%).

Residents (81% of respondents) would like to see Break O'Day's key townships support community hubs hosting regular events, markets, and social spaces. When asked how to align community needs with local venue opening hours, 48% saw improved communication and advertising of opening hours as the primary solution, followed by 38% for consistent opening hours throughout the week and 37% were in favour of seasonal adjustments based on visitor patterns. Overall, large scale resident support (66%) was noted for extending business opening hours.

When asked what additional services or amenities are required to shop more locally, residents expressed a desire for greater variety in high street stores and more competitive grocery and retail pricing relative to larger localities. They also highlighted the potential of loyalty schemes and the importance of supporting local producers. The streetscape and visual appeal of high streets

were also commented on as areas for improvement. Top priorities for our town centres in the future include better employment opportunities, further cultural and recreation facilities (such as swimming pools) and improved public transport.

### Community Collaboration and Involvement:

Residents expressed significant interest in supporting the strategy, noting their role can be in enhancing public spaces, organising community events and supporting local businesses.



## Business Responses

There was a diverse industrial coverage across business respondents with representatives from tourism & leisure, hospitality, agriculture & farming, retail, health & wellness, professional services, education & training, arts & entertainment and manufacturing & construction. Of the business respondents, 10 are sole traders, 7 have 2-5 staff members, 2 have 6-10, 3 have 11-20, and only one has 21-50 employees, with none reporting more than 50 employees.

In addition, 43% of businesses have been operating in Break O'Day for over 10 years, with 39% under 5 years and the remaining 17% operating locally for 5-10 years. In addition, the majority of businesses (57%) reported being in the growth phase of their operations.

## Industry Development

### Business Diversification:

In terms of industry diversification, respondents highlighted health and wellness (70%), eco-tourism (57%), and agribusiness and sustainable farming (48%) as key industries that should be targeted for development in Break O'Day. When asked what support businesses would need to diversify or explore new opportunities, aside from financial support and grants, the key responses were networking and partnership opportunities, business planning and strategy development, training and upskilling programs, and access to market research and feasibility studies.

In addition, 52% of businesses reported seasonal fluctuations in business activity as a key challenge in Break O'Day resulting largely due to a fall in visitor numbers and customer demand.

### Healthcare

Much like residents, businesses also acknowledged the importance of the healthcare and wellness sector in driving Break O'Day's economic development. When asked about the key factors for the region's economic success in 20 years, the primary response was good access to healthcare and

wellbeing facilities. Most businesses (16 out of 23) also highlighted health and wellness as a leading area to focus on for industry development.

### Skilled Workforce:

A significant portion of respondents detailed the need for more skilled workers, especially in healthcare and education. Difficulty in finding and retaining skilled labour was reported as the biggest obstacle to business respondents. Particular recruitment challenges were noted for professions such as nurses and teachers. These challenges are seen to be exacerbated by a lack of suitable worker accommodation.

In terms of attracting talent, 74% of businesses reported Break O'Day's quality of life and lifestyle benefits as a determining factor in locating their business in Break O'Day.

### Infrastructure:

#### Infrastructure Improvements:

Respondents identified improving road and transportation networks (65%), developing recreational and green spaces to attract visitors (52%), and enhancing public transport services and routes (39%) as the infrastructure improvements that would most benefit their businesses. When asked about their perceptions of current infrastructure, road and transportation networks and public transport options were seen to be the least satisfactory. Road conditions, St Marys Pass in particular, were highlighted as the key issue with the local road network.

#### Housing & Accommodation

13 out of 23 businesses advised that greater provision of regional accommodation would improve their ability to attract and maintain staff.

## Natural Environment

### Natural Assets

52% of respondents said the proximity to natural attractions and tourism potential was a factor in their decision to establish or operate in Break O'Day. Respondents were also keen to acknowledge our natural and coastal environment as key benefit of doing business in the Break O'Day.

## Community Wellbeing

### Youth and Education

When asked what specific types of skilled labour or workforce development programs would most benefit businesses, the joint top response was for apprenticeship programs. The other joint top priorities were industry-specific qualifications, continued education and upskilling, and customer service and sales training.

### Town Centre Activation

Much like residents, 83% of businesses would also like to see Break O'Day's key townships support community hubs hosting regular events, markets and social spaces. The top five priorities for improving St Helens and St Marys town centres were further cultural and recreation facilities (selected by 52% of respondents), better public transport (39%), improved cycling provision (35%), improved access to services (35%), and increased greenspace/vegetation (30%).

### Business Collaboration and Involvement:

Business respondents were receptive to adopting a collaborative approach to economic development, with 65% of businesses already regularly collaborating with other local businesses and the remaining 35% occasionally engaging with other businesses in the area. In addition, 57% of respondents would value support to increase local business engagement such as linking local suppliers and jointly promoting goods and services.

Businesses also expressed significant interest in supporting the strategy, particularly through job creation and workforce development, partnering with local government on infrastructure and development projects and through advisory committees.



## Economic conversation workshop 2

A second economic conversation workshop was held in St Helens in August 2024 to engage key stakeholders on the proposed actions for the strategy. The workshop was attended by representatives from Break O'Day Employment Connect, Regional Development Australia Tasmania and the wider community. The session was used to discuss results of the community engagement survey and to gather feedback from key organisational stakeholders on the proposed actions of the strategy.



**Economic Conversation Workshop 2 St Helens**

A summary of the session's key considerations for the action plan is provided below:

### Industry Development:

- Large support for apprenticeships, including those in non-traditional practices such as hospitality and IT. Though consideration is given to businesses' capacity to deliver the required training.
- Collaboration and engagement with local industry leaders and emerging businesses are key to encouraging idea sharing, addressing business needs and fostering a shared regional vision for businesses.

### Infrastructure:

- Support for the further development of multiple dwellings, considering the wide range of residents and residential needs.
- Focus on enhancing passive movement, the natural flow of people through public spaces, and improving active travel networks such as pedestrian and bike trails.
- Ensure that future development of infrastructure is inclusive, accessible, and adaptable.

### Natural Environment:

- Leverage existing natural resources to expand on sustainable practices such as glass recycling schemes, waste reprocessing initiatives and speciality crop production.
- Promote both preservation and restoration efforts in Break O'Day to ensure the protection of our aquaculture/agriculture industries, recreation facilities as well as the natural environment.
- Focus on the importance of water security & flood risk management and integrating these into strategic resilience planning.

### Community Wellbeing:

- Reaffirm the significant opportunities that exist in improving aged care provision.
- Upgrade community infrastructure to ensure it aligns with community needs and is fit for purpose.
- Improve educational opportunities to minimise parental shift away from Break O'Day to other areas with more extensive educational offerings.

# Appendix D: Community Engagement Survey



# Appendix E: Action Plan

## Appendix F: References

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