CENTRAL HIGHLANDS ECONOMIC REPORT

CENTRAL HIGHLANDS COUNCIL | APRIL 2024

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VERSION 1

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ACKNOWLEDGEMENT OF COUNTRY

Urban Enterprise is located on Wurundjeri Woi-Wurrung Country. We pay our respects to elders past, present and emerging and also acknowledge all Traditional Owners of Country on which we work.

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ACRONYMS

ABS	Australian Bureau of Statistics
GRP	Gross Regional Product
LGA	Local Government Authority
LQ	Location Quotient
NIEIR	National Institute of Economic and Industry Research
ReCFIT	Renewables, Climate and Future Industries Tasmania
SEIFA	Socio-Economic Index for Areas
TRA	Tourism Research Australia

GLOSSARY OF TERMS

Day trip Visitor
Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Employment
Represents the number of people employed by businesses / organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

Export-value
Represents the value ($) of goods and services exported outside of the defined region that have been generated by businesses / organisations in each of the industry sectors within the region.

Gross Regional Product
The total value of final goods and services produced in the region over the period of one year.

International Visitor
A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

Output
Represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Overnight Visitor
People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

Value-Added
represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production.

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1. INTRODUCTION

1.1. BACKGROUND

Central Highlands Council commissioned a strategic land use planning project for the municipality, and the key townships of Ouse, Bothwell and Hamilton. The project includes a Settlement Strategy, Economic Development Strategy and Structure Plans for Bothwell, Hamilton, and Ouse.

The purpose of this project is to strategically plan for future urban growth and encourage economic development and resilience in the municipality.

1.2. SCOPE

Urban Enterprise has been engaged by Niche Planning Studio (on behalf of Central Highlands Council) to provide economic input to inform the project. The scope of Urban Enterprise's input includes:

- An economic and employment profile of the municipality, including strengths, specialisations and trends.
- A tourism profile of the municipality and key areas, including visitation, product strengths, trends and key advantages.
- Economic, employment, demographic and tourism trends impacting the region and the State economies, and the implications and opportunities for Central Highlands.
- Consultation with business, industry and community representatives in respect of the local economy, industry development, the property market and the tourism sector.
- Analysis of land supply in Ouse, Hamilton and Bothwell to determine the availability and capacity of zoned land suitable for residential and employment uses.
- Recommend economic development strategies and actions for the municipality.

1.3. INFORMATION SOURCES

This memo relies on the following sources:

- Census of Population and Housing, Australian Bureau of Statistics, 2011, 2016, 2021;
- Census of Employment, Australian Bureau of Statistics, 2011, 2016, 2021;
- Business Counts, Australian Bureau of Statistics, 2011, 2016, 2021;
- Economic metrics, National Institute of Economic and Industry Research (NIEIR), 2022;
- National Visitor Survey & International Visitor Survey, Tourism Research Australia, 2013-23;
- National Skills Commission, 2018-23;
- Population projections, Tasmanian Department of Treasury and Finance, 2019; and
- Information gathered from consultation with key stakeholders (see Appendix B for summary).

The Australian Bureau of Statistics (ABS) Census is completed every 5 years, and is the most reliable source of data for population, demographic, housing and employment information. It is important to note, however, that the most recent Census (2021) is some 3 to 4 years old. As a result, some figures may not reflect current day figures (i.e. 2024). This is acknowledged as a minor limitation of the report.

DATA AREAS

For the purpose of data analysis, several statistical areas are referenced in this memo:

- Central Highlands (LGA);
- Greater Hobart (SA4);
- Southern Tasmania (SA4); and
- Tasmania.

Specific data areas are shown in **Appendix A.**

2. ECONOMY & EMPLOYMENT

2.1. INTRODUCTION

This section provides a profile of Central Highlands economy, and identifies industry drivers, specialisations and areas of comparative advantage.

2.2. LOCATION

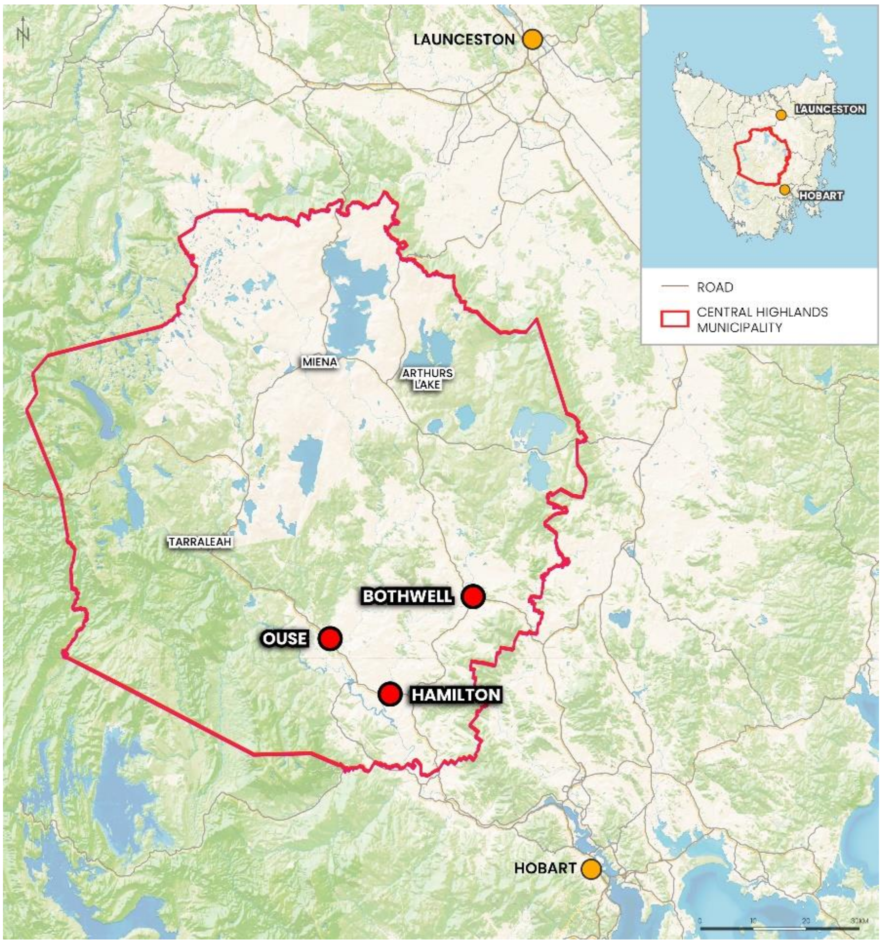
The Central Highlands municipality is located in central Tasmania; situated between the State's two major cities:

- Hobart (approx. 75km - 1hr drive to Hamilton); and
- Launceston (approx. 120 km – 1hr 20min drive to Miena).

Geographically, Central Highlands is one of the largest municipalities in Tasmania, covering around 12% of the state's land area (8,010 square kilometres). Conversely, Central Highlands is the least densely populated local government area in Tasmania, with around 2,520 residents.

The location of Central Highlands, including the key towns of Hamilton, Bothwell, Ouse in the context of Tasmania is shown in Figure 1.

F1. CENTRAL HIGHLANDS LOCATION CONTEXT



Source: Urban Enterprise, 2023

2.3. ECONOMIC OVERVIEW

The economy in Central Highlands is underpinned by the environment, natural assets, resources and productive soils. The secure and reliable access to water via well-established irrigation schemes, and the availability of water assets is critical to the function and productivity of the regional agricultural, horticultural and energy sectors.

These assets and natural advantages have culminated over time to establish economic specialisations in agriculture, horticulture, aquaculture, energy production, forestry and tourism.

Central Highlands economy accounts for less than 1% of Southern Tasmania's regional economic value in terms of Gross Regional product, output, value-add and export value.

Table 1 and 2 summarises annual economic metrics in Central Highlands for 2021-22 and benchmark against Southern Tasmania. In 2021-22, Central Highlands generated:

- A Gross Regional Product of $161 million (0.8% of Southern Tasmania).
- Output of $249.6 million and $134.7 million in value-added (0.8% of Southern Tasmania).
- An export value of $134 million (1% of Southern Tasmania).

Given that the local economy is underpinned by primary production, natural resources and assets, a notable proportion of economic value is exported out of the municipal area. This includes electricity generation from hydro power and renewable sources.

T1. ECONOMIC SNAPSHOT, CENTRAL HIGHLANDS, GREATER HOBART, TASMANIA, 2021

	Central Highlands	Southern Tasmania
Population	2,520	288,820
Gross Regional Product (GRP)	$161 million	$19.09 billion
Output	$249.6 million	$31.39 billion
Businesses	265	*
Jobs	815	127,465
Unemployment rate	3.8%	4.2%
Highest employing industries	Agriculture, forestry & fishing Accommodation & food services Retail trade	Health care & social assistance Education & training Public administration & safety

Source: Census of population, employment, ABS, 2021 / National Institute of Economic and Industry Research (NIEIR), 2022 / NVS/IVS, TRA, 2012-22. * data unavailable

In 2021-22, across local industry sectors:

- Agriculture, forestry and fishing generated 53% of annual output, 65% of value-add and 79% of export value.
- Construction generated 20% of output and 10% of value-added.
- Electricity, gas, water and waste services generated 8% of output and export value, and 5% of value-add.
- Accommodation & food services generated approximately 4% of output, value-add and export value.

All other industry sectors account for less than 15% of output, value-add and export value, indicating a relatively homogenous economy that is heavily driven by agriculture.

T2. OUTPUT, VALUE-ADD, EXPORT VALUE ($M), CENTRAL HIGHLANDS, 2021-22

Industry	Output	%	Value-add	%	Export Value	%
Agriculture, Forestry and Fishing	131.4	53%	87.8	65%	105.6	79%
Construction	51.1	20%	13.7	10%	0.2	0%
Electricity, Gas, Water and Waste Services	20.7	8%	7.2	5%	10.4	8%
Accommodation and Food Services	10.5	4%	5.7	4%	5.2	4%
Manufacturing	5.5	2%	1.7	1%	2.9	2%
Mining	5.1	2%	4	3%	4.8	4%
Public Administration and Safety	4.8	2%	2.7	2%	0.2	0%
Retail Trade	3.7	1%	2.2	2%	0.5	0%
Transport, Postal and Warehousing	2.9	1%	1.3	1%	1	1%
Wholesale Trade	2.6	1%	1.3	1%	0.6	0%
Arts and Recreation Services	2.6	1%	1.2	1%	2.1	2%
Health Care and Social Assistance	2.5	1%	1.9	1%	0.1	0.1%
Other Services	2.1	1%	1	1%	0.1	0.1%
Education and Training	1.7	1%	1.3	1%	0.1	0.1%
Professional, Scientific and Technical Services	0.9	0.4%	0.5	0.4%	0.1	0.1%
Administrative and Support Services	0.8	0.3%	0.4	0.3%	0	0.0%
Rental, Hiring and Real Estate Services	0.5	0.2%	0.5	0.4%	0.1	0.1%
Information Media and Telecommunications	0.3	0.1%	0.3	0.2%	0.1	0.1%
Financial and Insurance Services	0	0.0%	0	0.0%	0	0%
Total industries	249.7	100%	134.7	100%	134.1	100%

Source: National Institute of Economic and Industry Research (NIEIR), 2022

2.4. EMPLOYMENT & BUSINESS MIX

Central Highlands has a small employment and business base, with approximately 800 local jobs and 265 businesses operating in the municipality. Local employment and business figures are summarised in Table 3 (overleaf) and provide a breakdown of jobs by industry. It is important to note that figures represent place of work only. That is the number of jobs located within Central Highlands, and therefore does not include jobs who are commuting out of the municipality for work.

Employment in the agriculture, forestry and fishing industry accounts for 40% of jobs in Central Highlands. The balance of employment is primarily distributed across the accommodation and food services sector (16%), retail trade (5%), electricity services (5%) and public administration and safety (4.5%). Employment electricity services is most likely attributed to jobs associated with the hydropower schemes in the Derwent Valley. Anecdotally, around 35 workers are currently employed in the upper and lower part of the Derwent; many of which live in the Central Highlands, and generate notable economic benefits to the region.

Compared with the region of Southern Tasmania, there is an evident employment shortfall in population-service industries such as health care and social assistance, education and training, retail trade and construction. This is largely attributed to the small population base dispersed across a broad geographic catchment, meaning that businesses cannot rely on demand from local population catchment.

Close to half of the municipal businesses are in the agriculture, forestry and fishing industry. The balance of businesses operate across the construction, accommodation and food services, professional, scientific and technical services.

93% of businesses in Central highlands are categorised as small (less than 19 employees), and there are only 18 businesses who employ more than 20 people. There are no businesses who employ more than 200 people.

T3. EMPLOYMENT BY INDUSTRY, CENTRAL HIGHLANDS, 2021

Industry	Central Highlands	%	Southern Tasmania	%
Agriculture, Forestry and Fishing	318	40%	4,516	3.5%
Accommodation and Food Services	129	16%	10,567	8%
Retail Trade	40	5%	12,239	10%
Electricity, Gas, Water and Waste Services	38	5%	2,843	2.2%
Public Administration and Safety	36	4.5%	12,808	10.0%
Education and Training	31	3.9%	13,671	10.7%
Health Care and Social Assistance	31	3.9%	21,299	16.7%
Manufacturing	30	3.7%	7,063	5.5%
Construction	27	3.4%	9,292	7%
Arts and Recreation Services	23	2.9%	2,970	2.3%
Transport, Postal and Warehousing	21	2.6%	4,116	3.2%
Other Services	17	2.1%	4,768	3.7%
Inadequately described	17	2.1%	1,911	1.5%
Wholesale Trade	15	1.9%	2,249	1.8%
Administrative and Support Services	12	1.5%	3,286	2.6%
Professional, Scientific and Technical Services	8	1.0%	7,863	6%
Rental, Hiring and Real Estate Services	5	0.6%	1,539	1.2%
Mining	3	0.4%	211	0.2%
Information Media and Telecommunications	3	0.4%	1,568	1.2%
Financial and Insurance Services	0	0.0%	2,686	2.1%
Total	804	1	127,465	1

Source: Census of employment, ABS, 2021

T4. BUSINESS MIX BY EMPLOYEE NO. (>10 BUSINESSES), CENTRAL HIGHLANDS, 2022

Industry	Non employing	1-19 Employees	20-199 Employees	Total
Agriculture, Forestry and Fishing	56	47	15	118
Rental, Hiring and Real Estate Services*	30	0	0	30
Construction	14	3	0	17
Accommodation and Food Services	4	10	3	17
Professional, Scientific and Technical Services	8	9	0	17
Manufacturing	7	7	0	14
Transport, Postal and Warehousing	6	8	0	14
Total (all industries)	144	103	18	265

Source: Business counts, ABS, 2022
* typically includes property trusts

2.5. SPECIALISATIONS

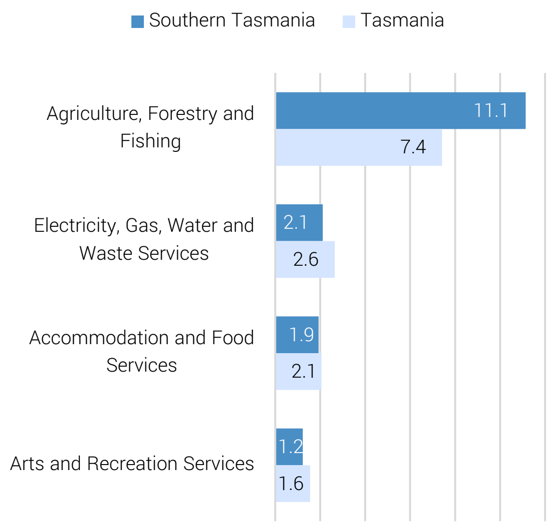
To understand employment specialisations in Central Highlands, relative employment comparisons can be made using the Location Quotient (LQ) technique. The LQ method measures the proportion of employment in a particular industry relative to another region.

The following LQ analysis compares Central Highlands with Southern Tasmania and Tasmania. An industry value greater than 1 represents a higher proportion of employment – LQ results that are substantially higher than the benchmark area (especially if the LQ exceeds 2) indicate a competitive advantage in that industry sector.

Figure 2 and Table 5 shows that Central Highlands has a competitive employment advantage in:

- **Agriculture, forestry and fishing**, which includes the **highly specialised sub-sectors of sheep farming and cattle farming.** An increase in intensive agricultural uses (e.g. cropping, horticulture) in the region is also evident. This is likely linked to the secure access to water from various irrigation schemes.
- **Tourism and accommodation**, which is a result of consistent domestic visitation to the region.
- **Electricity supply and generation,** but more specifically well-established hydropower schemes and electricity generation, along with emerging renewable energy projects (namely wind and solar).
- **Operation of nature parks and conservation reserves.**

F2. LQ>1, MIN. 20 JOBS), CENTRAL HIGHLANDS, 2021



Source: Urban Enterprise, 2023, derived from employment by industry, ABS, 2021

T5. LQ>1.5, CENTRAL HIGHLANDS, 2021

Southern Tasmania		Tasmania	
Agriculture, Forestry & Fishing			
Grain-Sheep or Beef Cattle Farming	5.6	Sheep Farming (Specialised)	5.0
Sheep-Beef Cattle Farming	4.7	Onshore Aquaculture	4.3
Dairy Cattle Farming	4.7	Sheep-Beef Cattle Farming	4.1
Sheep Farming (Specialised)	3.7		
Shearing Services	3.6		
Onshore Aquaculture	3.5		
Beef Cattle Farming (Specialised)	2.2		
Accommodation & Food Services			
Accommodation	2.4	Accommodation	2.5
Pubs, Taverns & Bars	2.2	Pubs, Taverns & Bars	2.1
Electricity, Gas, Water and Waste Services			
Electricity Supply, nfd	3.7	Hydro-Electricity Generation	4.6
Hydro-Electricity Generation	3.7	Electricity Supply, nfd	3.7
Arts & Recreation Services			
Nature Reserves & Conservation Parks Operation	7.5	Nature Reserves & Conservation Parks Operation	6.6
Sports & Physical Recreation Venues, Grounds & Facilities Operation	3.7	Sports & Physical Recreation Venues, Grounds & Facilities Operation	3.4

Source: Urban Enterprise, 2023, derived from employment by industry, ABS, 2021

2.6. TRENDS

Although Central Highlands has a small economy, employment is growing. Between the most recent Census periods (2016-21), employment increased by close to 160 jobs.

The municipality's most specialised industries all recorded jobs growth during that period, including notable increases in accommodation and food services (+51 jobs), agriculture, forestry and fishing (+24 jobs) and arts and recreation services (+14 jobs).

Over the five year period between 2017 and 2022, the construction industry recorded a $24 million growth in output. Other small increases in output were recorded for manufacturing, accommodation and food services, mining and agriculture.

T6. EMPLOYMENT TRENDS (JOBS), CENTRAL HIGHLANDS, 2016-21

Industry	Change #
Accommodation and Food Services	51
Agriculture, Forestry and Fishing	24
Other Services	17
Arts and Recreation Services	14
Retail Trade	14
Manufacturing	10
Wholesale Trade	9
Health Care and Social Assistance	8
Transport, Postal and Warehousing	6
Electricity, Gas, Water and Waste Services	6
Education and Training	5
Rental, Hiring and Real Estate Services	5
Administrative and Support Services	4
Information Media and Telecommunications	3
Inadequately described	2
Financial and Insurance Services	0
Mining	-2
Construction	-4
Professional, Scientific and Technical Services	-5
Public Administration and Safety	-9
Total	158

Source: Census of employment, ABS, 2016, 21

T7. CHANGE IN ANNUAL OUTPUT ($M), CENTRAL HIGHLANDS, 2017-22

	Change ($m)
Construction	$23.9
Manufacturing	$5
Accommodation and Food Services	$4.8
Mining	$4.7
Agriculture, Forestry and Fishing	$2.4
Arts and Recreation Services	$1.6
Retail Trade	$1.4
Other Services	$1.3
Health Care and Social Assistance	$1.2
Wholesale Trade	$0.3
Administrative and Support Services	$0.3
Information Media and Telecommunications	$0.2
Professional, Scientific and Technical Services	$0.1
Financial and Insurance Services	$0
Education and Training	$-0.3
Transport, Postal and Warehousing	$-0.8
Public Administration and Safety	$-1.1
Rental, Hiring and Real Estate Services	$-1.3
Electricity, Gas, Water and Waste Services	$-4.8
Total industries	$38.6

Source: National Institute of Economic and Industry Research (NIEIR), 2022

2.7. LABOUR FORCE

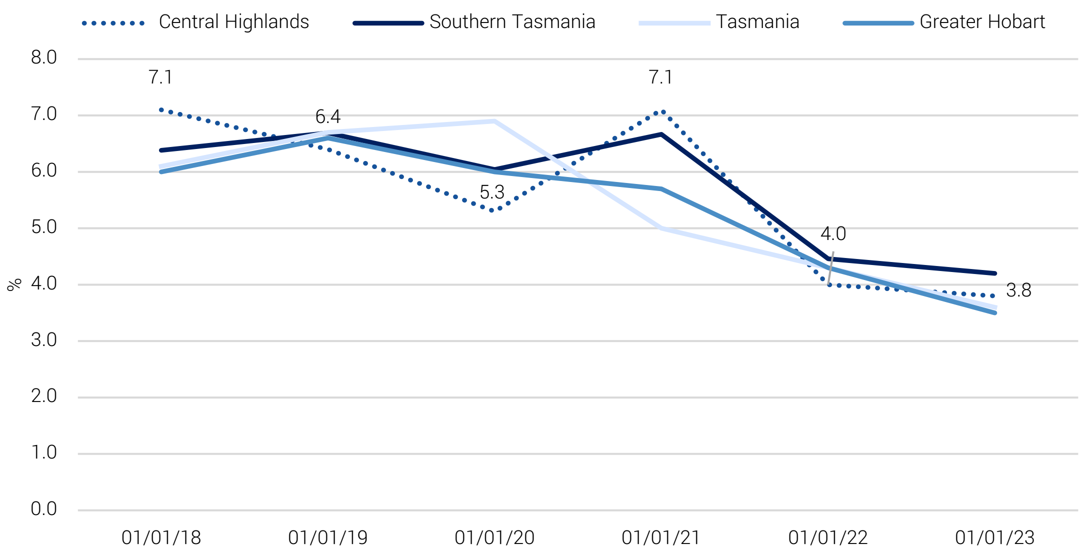
Labour force participation in Central Highlands (49%) is lower compared with Tasmania (58%), and provides further evidence of an older resident population.

As at June 2023, unemployment in Central Highlands was 3.8%; the lowest rate over the past 5 years. Unemployment is relative consistent with Greater Hobart and Tasmania.

Although there is a high proportion of managers in Central highlands, occupations are weighted towards lower skilled positions, including labourers, technicians and trades, community and personal workers, as well as machinery operators and drivers.

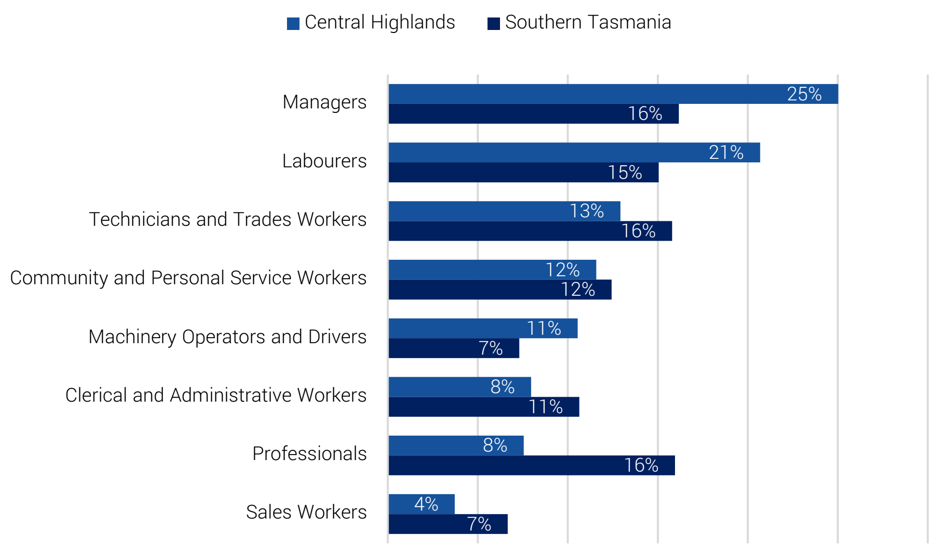
Low unemployment alongside a small labour force can often present challenges for businesses to find workers, and can lead to labour shortages.

F3. UNEMPLOYMENT RATE, CENTRAL HIGHLANDS, 2018-23



Source: Unemployment rate, National Skills Commission, 2018-23

F4. OCCUPATIONS, CENTRAL HIGHLANDS, 2021



Source: Census of employment, ABS, 2021

PLACE OF WORK

Around 510 employed residents live and work in Central Highlands, which equates to a job containment rate of 53%. The balance (47%) of employed residents travel to other parts of Tasmania for work, including a substantial proportion to who commute to Greater Hobart (22%).

Comparatively, Central Highlands attracts a notable proportion of transient workers from outside of the municipality, particularly during periods in which a major infrastructure project is being constructed, delivered or maintained. Examples of this include Hydro Tasmania maintaining infrastructure and assets, as well as forestry and tourism sector workers.

T8. PLACE WORK, EMPLOYED RESIDENTS, CENTRAL HIGHLANDS, 2021

Place of Work (LGA)	#	%
Central Highlands	508	53%
Derwent Valley	111	12%
No Fixed Address	90	9%
Glenorchy	**82**	**9%**
Hobart	**68**	**7%**
Brighton	**29**	**3%**
Clarence	**17**	**1.8%**
Launceston	17	1.8%
Southern Midlands	17	1.8%
Kingborough	**6**	**0.6%**
Sorell	**6**	**0.4%**

Source: Place of work, Census of employment, ABS, 2021
Bold indicates LGAs in Greater Hobart

2.8. MACRCOECONOMIC CONSIDERATIONS

This section provides a discussion of macroeconomic considerations relevant to Central Highlands, with a focus on the current state and outlook for agriculture, tourism, climate change and renewable energy in Tasmania.

2.8.1. AGRICULTURE

Agriculture is one of Tasmania's most important industry sectors in terms of production value, jobs, investment, and exports. Tasmania's advantages are linked to its climate, fertile soils, natural resources, biosecurity, and water for irrigation. The Gretna and Southern Midlands irrigation schemes will continue to provide irrigated water to support agricultural enterprises and activities in Central Highlands.[1]

The industry has recorded an increase of approximately 2,000 jobs between 2016 and 2021. In 2020/21, the total value of Tasmania's agriculture sector was $2.34 billion[2]. The most prevalent agricultural commodities produced in Tasmania are livestock, dairy and fruit products. The Government and state agricultural industries have set a target to grow the farm gate value of Tasmanian agriculture to $10 billion by 2050.

Tasmania's agriculture sector will seek to increase the sustainable growth and productivity of the agri-food industry, through prioritising Government research and development across four recognised areas:

- Industry development and sustainable production;
- Capacity building;
- Innovation; and
- International linkages.

International markets (notably China, the United States and Japan) will continue to provide exporting opportunities for Tasmanian agriculture businesses, supported by domestic population growth and increasing demand for higher quality and a greater variety of food and fibre.

Central Highlands is well positioned to leverage the positive outlook for the agriculture sector, due to existing specialisations in livestock farming (beef, lamb) and horticulture.

2.8.2. TOURISM

Tasmania's Visitor Economy Strategy 2030 (VES) was published by the State Government in 2023, with the vision that, by 2030, the visitor economy will be valued by Tasmanians for its positive impact on the environment and way of life and by visitors for being a genuinely different experience.

The Strategy seeks to provide clarity to the community, industry and government on agreed priorities and accountabilities to achieve the 2030 visitor economy vision. The VES places a focus on creating a climate conscious travel destination, promoting year-round visitation, investment attraction, investing in and supporting events, and building awareness around Tasmania as a destination state.

The tourism sector is a key pillar in Tasmania's economy, employing 37,300 people (12% of Tasmania's workforce), and contributing $2.59 billion to gross state product (6.7% of GSP). In 2022, interstate and international tourism expenditure had rebounded since the pandemic, and total visitor spend reached almost $4.3 billion. Despite international visitation being well below pre-pandemic levels, Tasmania attracted 1.3m visitors (year ending March 2023), which is 99% of 2019 visitation.

Upward inflationary pressures and rising interest rates are likely to impact the outlook for tourism in Tasmania in the short term, as household disposable income per capita is expected to fall through 2024. Despite the cost-of-

[1] Southern Central Infrastructure Planning Study, 2022

[2] Tasmanian Agri-food Scorecard 2020-21.

living concerns, travel has remained resilient so far, with one third of Australians planning a domestic leisure holiday in the next three months.

The following priorities for Central Highlands tourism sector align with State tourism objectives:

- Addressing seasonality challenges and growing visitation during off-peak months;
- Increasing awareness and improving access to key natural attractions;
- Accommodating and servicing visitors through quality accommodation, and food and beverage options.

2.8.3. CLIMATE CHANGE & RENEWABLE ENERGY

Climate change is an issue that presents challenges and opportunities for Tasmania. The State Government has legislated a renewable energy target of 200% renewable energy production by 2040, after reaching 100% renewable energy in 2020. Tasmania's target is to produce 21,000 gigawatt hours of electricity per annum by 2040, which equates to 200% of energy demand in 2020. The State also has an interim target to produce 15,750 gigawatt hours of electricity per annum by 2030.

Renewable energy production has played an important role in Tasmania's history, with several Hydro-electric power stations being established and operating through the 1900's. Tasmania is well-positioned to capitalise on the global shift from fossil fuels to renewable energy as a primary economic driver. With its strong history of industry development and abundant high-quality renewable energy resources, the state is uniquely equipped to thrive in the emerging renewable energy industry, supporting global efforts to combat climate change.

Renewables, Climate and Future Industries Tasmania (ReCFIT) is a division of the Department of State Growth that provides strategic direction on climate change, renewable energy growth and emissions reduction. ReCFIT was established to align a transitioning energy sector, with the opportunities of a changing climate and to help shape a sustainable energy system for Tasmania.

Several major renewable projects have been announced, and are at various stages of development, to capitalise on the abundant wind and hydro resources, including the Marinus Link, Battery of the Nation & Tarraleah Redevelopment, as well as various wind and solar farm projects.

Together these projects will contribute to the National Energy Market with renewable and reliable energy to secure lower cost energy prices. Further information on these projects provided in the table below.

T9. RENEWABLE ENERGY INVESTMENT PIPELINE, TASMANIA

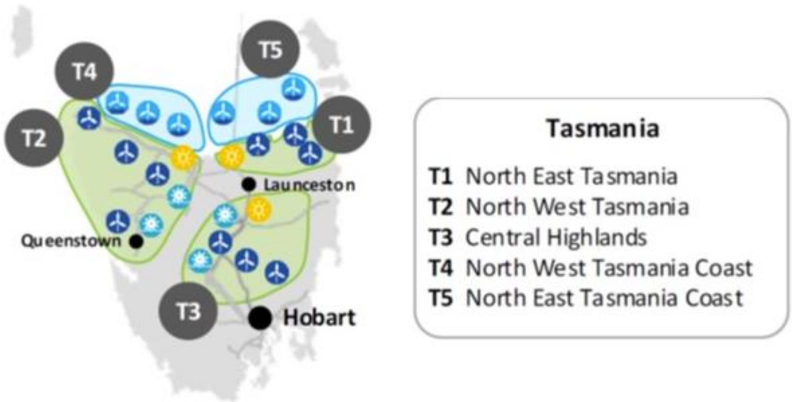
Project	Description	Investment	Timing
Marinus Link	The Marnus Link interconnector joins Tasmanian and Victorian transmission lines, allowing for the transportation of renewable energy between Tasmania and Victoria. Expected to be delivered across 2 stages, each stage involving the installation of a 750MW capacity cable system. The project will allow Tasmania to combine the benefits from wind, solar and hydro to provide Tasmanians with the lowest cost energy prices; while the mainland gain access to hydro storage to firm up energy supply.	Stage one will cost in the range of \$3.0-3.3 billion. The Tasmanian Government is expected to invest between \$106 - \$117 million into the project.	Stage one is expected to start construction in 2025 and be delivered in 2028.
Battery of the Nation	The Battery of the Nation project is a vision to maximise Tasmania's hydropower capacity, which includes the redevelopment of the Tarraleah hydropower scheme and adding pumped hydro. The biggest impacts from increasing hydropower capacity are realised through the increased ability to store renewable energy for use during peak times when prices rise. The Tarraleah Redevelopment will also provide faster and more flexible operations to better support growth in wind and solar power. The project will deliver a total of 190MW, adding 100MW to the existing 90MW scheme.	Tarraleah is estimated to cost around \$1.05 billion, with funding from Hydro Tasmania, Federal and state Government.	Tarraleah Redevelopment will align with stage one of the Marinus Link and is expected to be completed around 2028.
Renewable Energy Projects	There are several wind and solar farm projects mooted for Central Highlands and Tasmania, including:		Individual projects are in various stages of feasibility,

	• Robbins Hill Wind Farm (320MW, potential stage 2 bringing total capacity up to 1,000MW) • Jims Plains Wind Farm (240MW) • St Patricks Plains Wind Farm (300MW) – Approved by Central Highlands Council July 2024. • Northern Midlands Solar Farm (290MW) • Basahan Wind Farm (460MW) • Weasel Solar Farm (200MW) • Highlands Renewable Energy Hub (Solar Farm, BESS & renewable energy business park)		planning and development.
Northwest Transmission development	The Northwest Transmission development is being undertaken by TasNetworks to upgrade the existing network and provide new infrastructure to unlock investment and renewable energy opportunities. The project is needed to achieve the 2040 renewable energy target for 200% renewable energy production. The project will provide capacity to support new and existing renewable energy developments in the Northwest renewable energy zone.	The development is estimated to cost $1.5 Billion	Stage 1 of the development is expected to be complete in 2028, in line with the Marinus Link.

Some regions are better placed to accommodate renewable energy production than others. This is due to weather patterns, existing land uses, proximity to grid infrastructure, or a combination of these factors. Renewable Energy Zones (REZ) are high-quality resource areas where clusters of large-scale renewable energy projects can be developed. The establishment of REZs will coordinate access to existing and new transmission lines to areas with excellent renewable energy resources.

In 2022, Australian Energy Market Operator (AEMO) identified three candidate REZ and two Offshore Wind Zones (OWZs) in Tasmania. Central Highlands municipality is located within the Central Highlands REZ (see Figure 5), with the presence and agglomeration of Tarraleah Hydropower, the Cattle Hill Wind Farm, St Patricks Plains Wind Farm (proposed), Weasel Solar Farm (proposed). Significant opportunities for investment in renewable energy projects and associated supply-chain activities are expected to continue, and will present opportunities for townships such as Bothwell to become service hubs for regional projects that are proximate to the town.

F5. TASMANIA'S REZ



Source: Tas State Government, 2022

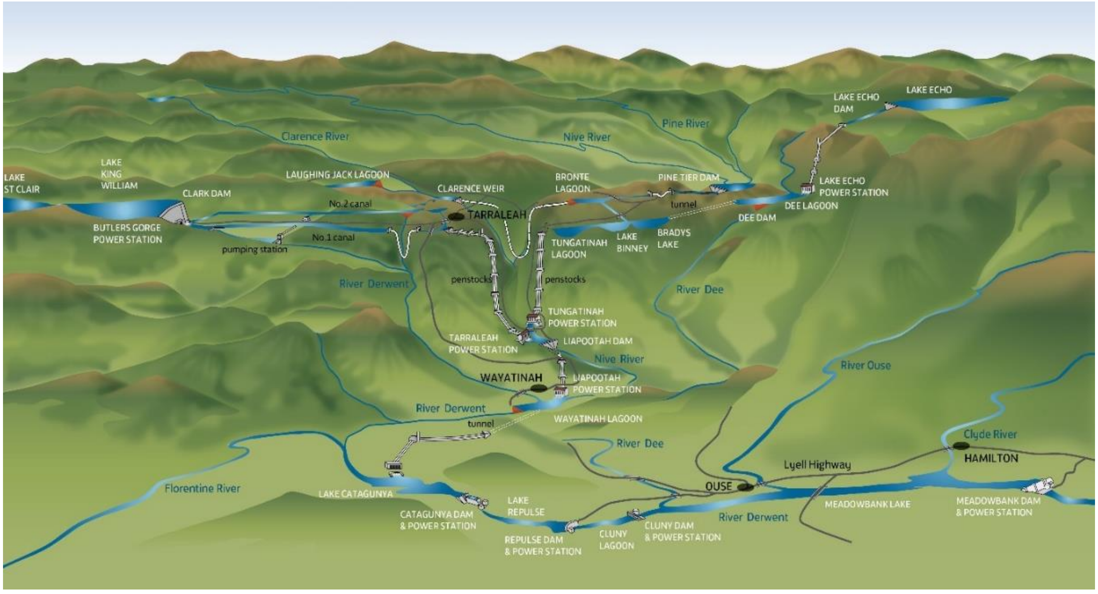
DERWENT HYDROPOWER SCHEME

Hydropower is the largest source of flexible energy generation and storage in the National Electricity Market (NEM). Construction of the Derwent hydropower scheme in the Central Highlands commenced in the 1930's. The scheme includes 10 different hydro stations of various scales, including Meadowbank, Cluny, Repulse, Catagunya, Wyatinah, Butlers Gorge, Tarraleah, Liapootah, Lake Echo and Tungatinah.

The hydro scheme has developed over many decades to become very well established, and is a major asset for the region. The upper and lower Derwent schemes employ around 35 jobs (FTE).

An overview of the scheme is shown in Figure 6.

F6. DERWENT HYDRO SCHEME

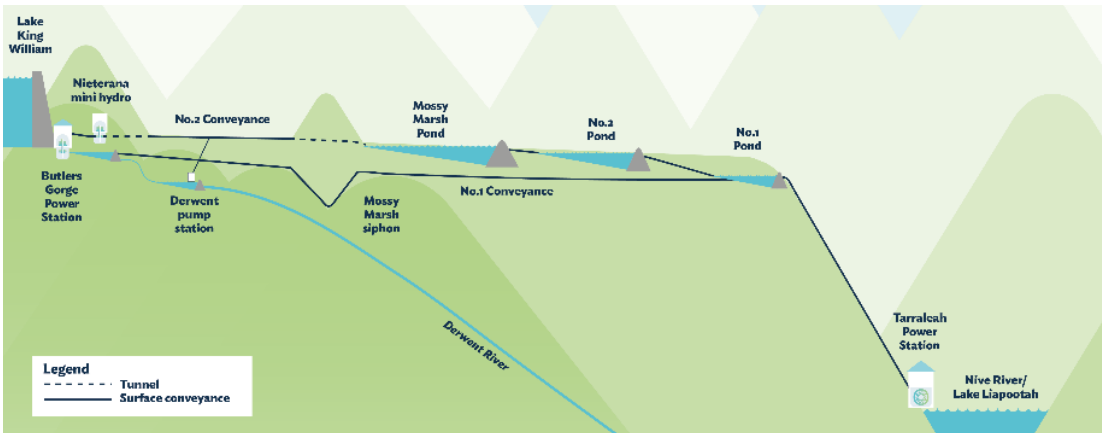


Source: Hydro Tasmania, 2024

The Tarraleah Redevelopment is a significant proposed project that will further support growth in renewable energy project investment such as wind and solar power. The project is estimated to deliver a total of 190MW, adding 100MW to the existing 90MW scheme.

The redevelopment has the potential to deliver substantial flow-on economic benefits to the Central Highlands region through the attraction of construction and operational phase workers, and associated spending.

F7. TARRALEAH HYDROPOWER SCHEME, EXISTING CONFIGUATION



Source: Hydro Tasmania, 2024

2.8.4. OTHER REGIONAL INFRASTRUCURE & INVESTMENT PRIORITIES

The South Central Sub-region (SCS) includes the municipalities of Central Highlands, Brighton, Southern Midlands and Derwent Valley. An Infrastructure Planning Study was published in 2022, and outlines investment and infrastructure priorities for the region.

Priorities that are relevant to economic growth, investment and development in Central Highlands are as follows:

- Promote residential and commercial development.
- Facilitate and expand investment in social and affordable housing.
- Invest in social infrastructure to support existing and future residents, including childcare, medical services, open spaces and streetscaping.
- Leverage planned game changing infrastructure investments such as the Tarraleah Hydro Scheme and Tas Irrigation Scheme in Greta ad Southern Midlands.
- Advocate for improved telecommunications infrastructure and services.
- Leverage the region's natural advantages in energy generation.
- Advocate for incremental improvements to the road network.

Economic development strategies and actions should seek to align with the above regional priorities.

2.9. KEY POINTS

- The economy in Central Highlands is underpinned by the environment, natural assets, resources (such as water) and land that is suitable and productive for agriculture.
- Central Highlands has a competitive employment and economic advantage in:
  - Agriculture, namely sheep farming, cattle farming, horticulture and aquaculture;
  - Tourism and accommodation;
  - Electricity supply, especially hydropower electricity generation; and
  - Operation of nature parks and conservation reserves.
- Agriculture is a major strength, and the primary economic driver of the region.
- The diversity of hydropower schemes are significant economic assets in the region, which are fundamental to the function and sustained productivity of the agricultural sector.
- Around 35 workers are currently employed in the upper and lower part of the Derwent hydro scheme; many of which live in the Central Highlands, and generate notable economic benefits to the region.
- Despite having a small economic base, employment has grown between Census periods; including in specialised industries.
- There is relatively low labour force participation and low unemployment. Without replenishment of the workforce, businesses will face challenges in sourcing appropriate labour and skills required to operate viably and productively.
- The economic importance and positive outlook for the State's agriculture, tourism and renewable energy sectors present opportunities for economic growth and development in Central Highlands.

3. POPULATION & HOUSING

3.1. INTRODUCTION

This section evaluates the current demographic and housing profile in Central Highlands, as well as population and dwelling growth trends.

3.2. POPULATION & DEMOGRAPHIC SNAPSHOT

Key observations in relation to Central Highlands population and demographic characteristics are as follows:

- The population of Central highlands is around 2,500 residents.
- Central Highlands has an older age profile, with a median age of 50 years (39 years in Greater Hobart).
- Household composition is weighted towards older cohorts, including empty nesters/retirees, older workers/pre-retirees and seniors.
- Socioeconomic disadvantage in Central highlands is higher than the national average.

T10. POPULATION & DEMOGRAPHIC SNAPSHOT, CENTRAL HIGHLANDS & GREATER HOBART, 2021

	Central Highlands	Greater Hobart
Population	2,520	247,086
SEIFA	911	1002
Median age	50	39
Service age groups (top 5)	Empty nesters/retirees (60 to 69): 18% Older workers/pre-retirees (50 to 59): 16% Parents/homebuilders (35 to 49): 16% Seniors (70 to 84): 15%	Parents / homebuilders (35 to 49): 19% Young workforce (25 to 34): 16% Older workers/pre-retirees (50 to 59): 12% Empty nesters/retirees (60 to 69): 12% Seniors (70 to 84): 11%
Dwelling Structure	Detached House: 92% Caravan, Cabin, houseboat: 6% Flat or apartment: 1%	Detached House: 84% Flat or apartment: 9% Caravan, Cabin, houseboat: 6%
Household composition	Lone person: 33% Couples without children: 26% Couples with children: 18% One parent families: 6%	Couples without children: 27% Lone person: 27% Couples with children: 26% One parent families: 12%
Household Income (weekly, median)	$1,013	$1,542
Tenure	Owned Outright: 49% Mortgage: 26% Rented: 18%	Owned Outright: 34% Mortgage: 35% Rented: 29%

Source: Census of population and housing, ABS, compiled by id Consulting, 2021

3.3. HOUSING

Key observations in relation to Central Highlands housing stock are as follows:

- The existing housing stock is characterised by detached house with smaller household sizes (2.1 people) compared with Greater Hobart (2.4 people).
- Close to two-thirds of dwellings are unoccupied, indicating a very high proportion of holiday homes.
- There are around 2,750 dwellings in Central Highlands. It is unusual for a municipality to accommodate more dwellings than residents, but provides further evidence of the high proportion of holiday homes in the region.
- The median house price in Central Highlands is $275,000, which is almost 2.5 times less than Greater Hobart ($675,000), highlighting an affordability advantage.

It should be noted that the median price includes all houses in the municipality, including smaller properties that are relatively isolated from settlements.

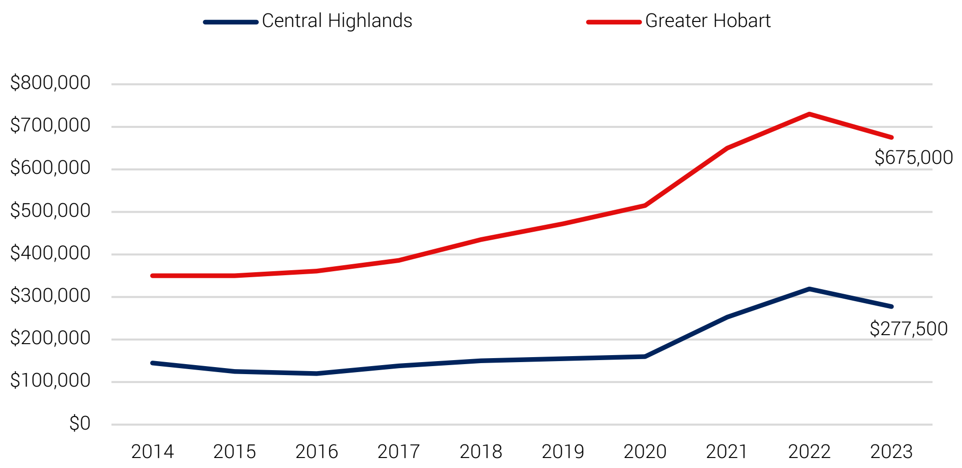
A desktop search into current property listings in Bothwell, Hamilton and Ouse shows that prices for 3-5 bedroom houses generally range from $450,000 to $750,000.

T11. HOUSING SNAPSHOT, CENTRAL HIGHLANDS & GREATER HOBART, 2021

	Central Highlands	Greater Hobart
Dwellings	2,752	106,298
Dwelling Structure	Detached House: 92% Caravan, Cabin, houseboat: 6% Flat or apartment: 1%	Detached House: 84% Flat or apartment: 9% Caravan, Cabin, houseboat: 6%
Ave household size	2.1 people	2.4 people
Unoccupied dwellings	61%	7.3%
Tenure	Owned Outright: 49% Mortgage: 26% Rented: 18%	Owned Outright: 34% Mortgage: 35% Rented: 29%
Median house price	$275,000	$675,000

Source: Census of population and housing, ABS, 2021 / Median house values, Valuer General, compiled and analysed by Pricefinder, 2023

F8. MEDIAN HOUSE VALUES, CENTRAL HIGHLANDS, 2014-23



Source: Median house values, Valuer General, compiled and analysed by Pricefinder, 2014-23

3.4. DEMOGRAPHC TRENDS

Age and lifecycle trends in Central Highlands shows notable growth in older cohorts and households types between the 2016 and 2021 census periods, especially empty nesters, retirees and seniors. Alongside this, there was a decline in children of primary school age (5-11 years), but an increase in babies/pre-schoolers (<4 years) and secondary schoolers (12-17 years).

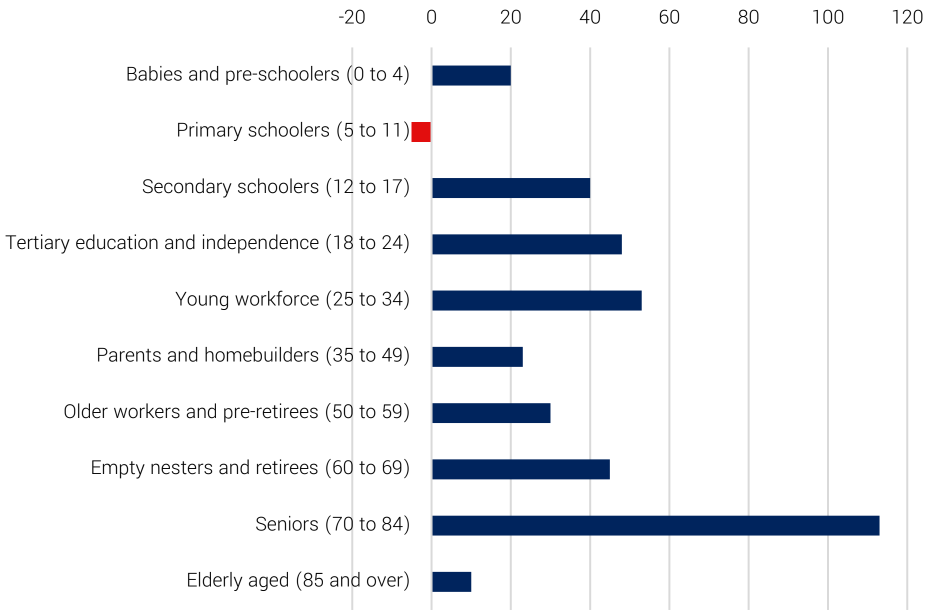
These patterns further confirm an overall ageing of the population that is not being 'offset' by growth in younger cohorts, especially younger families.

T12. AGE TRENDS, CENTRAL HIGHLANDS, 2016-21

	2016	2021	Change #	Change %
0-9 years	226	238	12	5%
10-19 years	205	253	48	23%
20-29 years	168	242	74	44%
30-39 years	223	256	33	15%
40-49 years	241	252	11	5%
50-59 years	378	413	35	9%
60-69 years	413	454	41	10%
70-79 years	232	320	88	38%
80+ years	64	89	25	39%
Total	**2150**	**2517**		

Source: Census of population and housing, ABS, 2016-21

F9. LIFECYCLE GROUP, CENTRAL HIGHLANDS, 2016-21



Source: Census of population and housing, ABS, 2016-21

3.5. HISTORICAL GROWTH

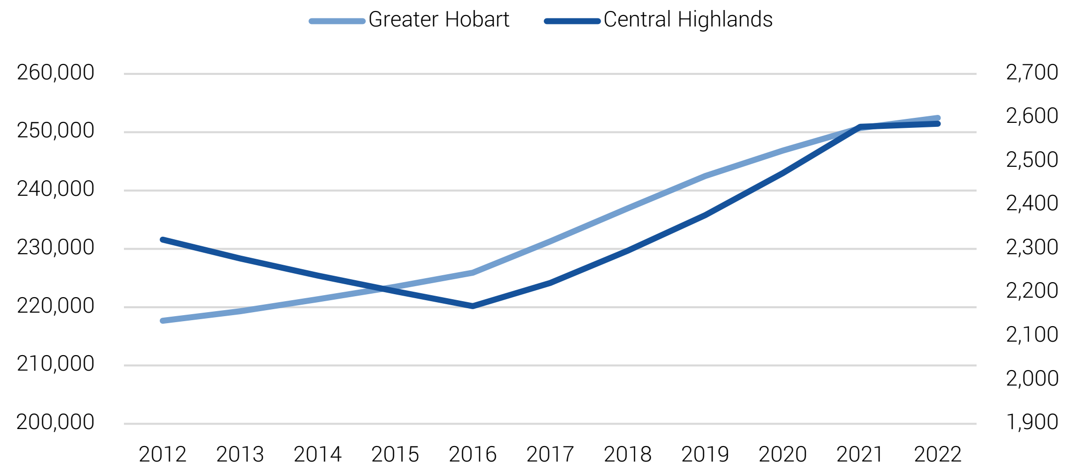
POPULATION

Central Highlands has recorded low population growth over the past decade, and from a low base. The municipal population increased by 265 residents between 2012 and 2022, growing at around 1.1% per annum (average). This rate of growth is lower when compared with Greater Hobart (1.4% p.a.).

Since 2017, the main source of population growth had come from natural increases. With the exception of 2020 and 2022, the municipality has experienced an annual net loss in internal migrants. This means that the number of residents moving to other parts of Tasmania and Australia outweighs the number of residents arriving.

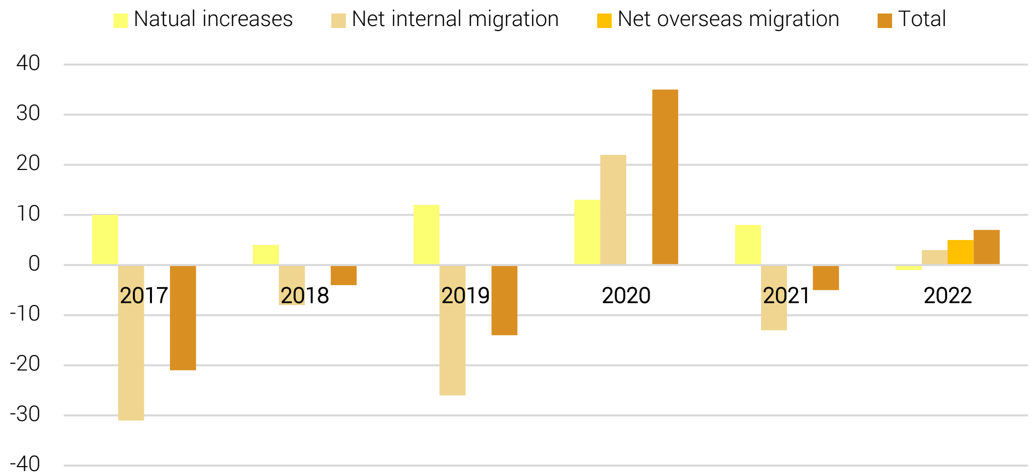
Economic growth and resilience typically relies on population attraction and retention. Central Highlands should aspire to attract and retain residents, especially those of working age. For this to occur, genuine employment opportunities would need to be available locally or within a reasonable commuting distance. Further, younger and middle aged working families expect essential amenity, infrastructure and services to be available such as schools, childcare, health care, retail, and so on.

F10. HISTORICAL POPULATION GROWTH, CENTRAL HIGHLANDS, GREATER HOBART, 2011 TO 2021



Source: Census of Population, ABS, 2011 to 2021

F11. COMPONENTS OF POPULATION CHANGE, CENTRAL HIGHLANDS, 2017 TO 2021



Source: Components of population change, ABS, 2017-21

DWELLINGS

Dwelling growth Central Highlands is low, and residential development is very limited. The municipality has averaged around 10 new dwellings per annum (2011-21).

In the most recent 3.5-year period (2019-23 YTD), Central Highlands averaged 11 dwelling approvals per annum. Together, Ouse, Hamilton and Bothwell averaged 2 dwelling approvals per annum.

Central Highlands Council also provided planning and building approval data for the 2024 financial year. Across the municipality Council:

- Received 14 planning permits for single residential dwellings;
- Received 16 application for new dwellings; and
- 5 new lots were created through subdivision.

Historically low dwelling growth could be attributed to one or a combination of factors such as weak demand, unavailability of suitable housing or 'market ready' zoned land, and/or viability challenges of subdivision and development (due to lower property values relative to development costs).

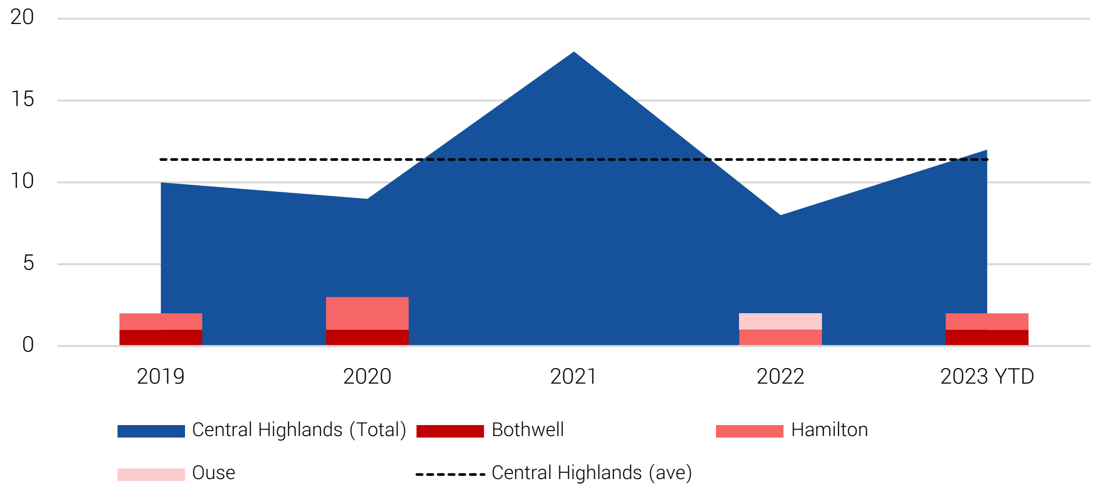
There is a direct relationship between population growth and the availability of suitable housing. If suitable housing is unavailable, it is difficult to attract residents. If population growth is low, it is difficult to attract residential development.

T13. DWELLINGS, CENTRAL HIGHLANDS, 2011-21

	2011	2016	2021	Change (2011-21)	AAC (2011-21)	AAG (2011-21)
Central Highlands	2,661	2,581	2,752	+91	+9	0.3%
Southern Tasmania	22,407	23,145	25,726	+3,319	+332	1.4%
Greater Hobart	94,452	99,009	106,298	+11,846	+1,185	1.2%
Tasmania	233,136	242,514	259,318	+26,182	+2,618	1.1%

Source: Census of population and housing, ABS, 2011 to 2021

F12. DWELLING APPROVALS, CENTRAL HIGHLANDS & KEY TOWNS, 2018 TO 2023 YTD



Source: Dwelling approvals, ABS, 2018 to 2023 YTD
YTD is to December 2022

3.6. POPULATION PROJECTIONS

Every five years the Department of Treasury and Finance prepares official State Government population projections for Tasmania and for each local government area. Projections are prepared across low, medium and high scenarios, with the medium projections considered the most likely to materialise based on demographic, migration and birth/death rate trends and patterns.

Over the 30 year period under the medium series:

- Tasmania's population would increase by around 67,900, increasing at 0.4% per annum (average);
- Greater Hobart's population would increase by approximately 45,000 (0.6% p.a.), and account for two-thirds of Tasmania's growth; and
- Central Highland's population growth would be negligible, adding 23 residents at 0.03% growth per annum.

It should be noted that population projections at the local level are typically highly variable, especially for an area such as Central Highlands, which has a low population base. It is apparent that the projections for Central Highlands reference the historical rate of growth in the municipality. For Central Highlands to improve liveability and economic resilience, a more aspirational population growth rate needs to be achieved, and ultimately planned for.

Central Highlands has the potential to achieve a higher rate of population growth by attracting internal migrants from mainland Australia and other parts of Tasmania (e.g. Greater Hobart). The favourable lifestyle and affordability advantages of Central Highlands could appeal to prospective residents. Further, as the risks of climate change and extreme temperatures (and weather events) persist over time, Tasmania (and Central Highlands) could be the beneficiary of greater movement of residents from mainland Australia.

T14. POPULATION PROJECTIONS

	2023	2053	Change	AAC
Tasmania	573,156	641,045	67,889	0.4%
Greater Hobart	249,247	294,234	44,987	0.6%
Central Highlands	2,595	2,618	23	0.03%

Source: Population projections, Tasmanian Department of Treasury and Finance, 2023

3.7. HOUSING DEMAND RATES

Historically, the demand rate for new housing has fluctuated in Central Highlands. On average, the municipality has recorded between 9-12 new dwellings per annum, with around 20% of activity (only 2-3 dwellings) located in the settlements of Bothwell, Hamilton and Ouse.

To ensure that the Central Highlands economy remains resilient and communities are sustainable, Central Highlands should plan for a more aspirational housing demand rate (15-25 p.a.), with a higher level of growth directed to existing settlements, especially in Bothwell, Hamilton and Ouse where existing Village Zone land, amenity and services exist.

T15. HOUSING DEMAND RATE

Central Highlands	Demand rate (annual)
Dwelling approvals (2019-23)	10-12
Dwelling growth (2011-21)	9-10
Range (historical)	9-12
Aspirational (future)	*15-25*

Source: Urban Enterprise, 2024

3.8. KEY POINTS

- Central Highlands has a small population, and has experienced negligible population and dwelling growth over the past decade.
- The main source of population growth is from natural increases. The municipality recorded a net loss in migration, meaning departures have outweighed arrivals.
- If historical rates of growth endure (as is projected), low growth will continue over the next 20 years; in turn impacting the sustainability of communities and the economy.
- The age profile of the population is weighted towards older cohorts (retirees, seniors), and the population is ageing.
- As a place to live, the municipality has advantages in housing affordability and lifestyle (e.g. access and proximity to natural assets).
- Given the low growth conditions, population retention and attraction will be critical for economic resilience and growth, particularly attracting and retaining young and middle aged working families.
- It is apparent that a more aspirational population and housing growth rate needs to be achieved and planned for. For this to occur, appropriate housing needs to be available by encouraging more residential development.
- New housing growth should be directed to settlements where there is an existing level of amenity and services, especially in Bothwell.
- Other important factors in respect of population attraction and retention includes the availability, or access to employment (locally or within a reasonable commuting distance), as well as essential infrastructure and services such as schools, childcare, health care, aged care, retail, and so on.

4. TOURISM & VISITATION

4.1. INTRODUCTION

This section provides an overview of the tourism industry in Central Highlands, including product strengths and attractions, visitation and visitor market profile.

Visitation and visitor market data is sourced from Tourism Research Australia's (TRA) National Visitor Survey, which publishes domestic visitator statistics on an annual basis. Definitions of a day trip visitor and an overnight visitors are provided in the Glossary of Terms.

4.2. PRODUCT & ATTRACTIONS

The primary product strengths in Central Highlands include:

- Sightseeing, hiking, bushwalking and camping in state forests and national parks;
- Recreational boating and fishing in the network of lakes and rivers;
- Hunting; and
- History and heritage significance of townships and settlements.

Signature attractions and experiences in the region include:

- Fly fishing in Great Lake, Woods Lake, Arthurs Lake, Little Pine Lagoon and Penstock Lagoon;
- National Parks and conservation areas such as Mount Field National Park, Walls of Jerusalem National Park, Franklin-Gordon Wild Rivers National Park;
- Multi-day hikes such as the overland track, Tasmanian trail, labyrinth trail and Lake Antimony trail.
- Boating and fishing in Lake St Clair, Great Lake, Arthurs Lake, Meadowbank Lake and Derwent River.
- Whiskey distillery's at Lawrenny Estate (Ouse), Lower Marsh (Apsley) and Kempton (in Southern Midlands).

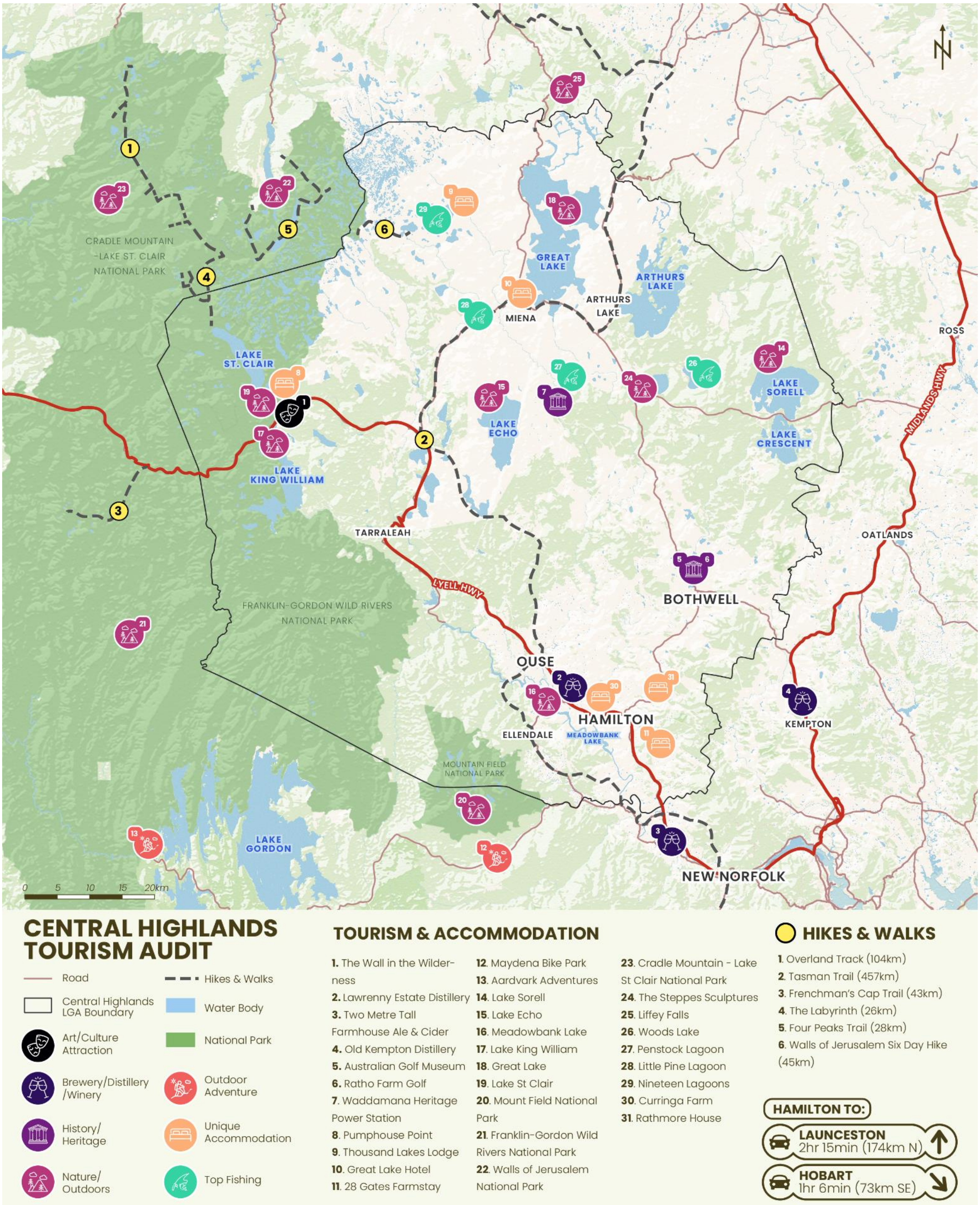
Figure 13 summarises the primary and secondary tourism product strengths in Central Highlands and surrounds. Figure 14 shows the location and spatial distribution of key attractions in the region.

F13. PRODUCT & ATTRACTION STRENGTHS, CENTRAL HIGHLANDS

	Primary	Secondary
Nature-based & wilderness experiences	●	
Recreational boating and fishing	●	
Hiking & bushwalking	●	
History & heritage		●
Food and beverage (local produce)		●
Festivals & events		●

Source: Urban Enterprise, 2023

F14. TOURISM & ACCOMMODATION, CENTRAL HIGLANDS & SURROUNDS



Source: Urban Enterprise, 2024

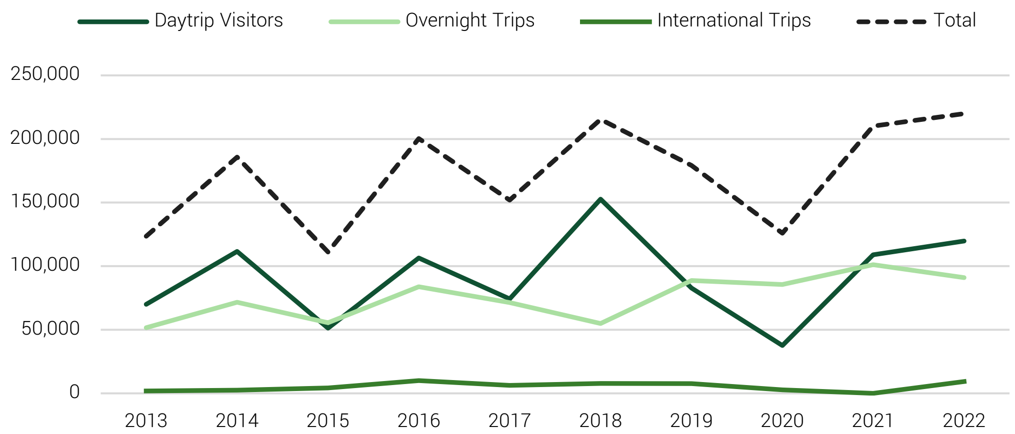
4.3. VISITATION

On average, Central Highlands attracts around 190,000 visitors per annum, and consists of 53% daytrip visitors, 44% day trip visitors and 3% international visitors.

Visitation to Central Highlands equates to approximately 7% of visitation to the Greater Hobart area, which attracts more than 2.8 million visitors per annum. Over the past 5 years, visitation to Central Highlands has fluctuated from year to year, but overall visitation has increased by 45%. Growth in visitation is attributed to domestic daytrips (66%), followed by overnight trips (28%).

Visitation fell sharply in 2020 during the first year of the pandemic period (2020-2021), but rebounded strongly; and has recovered to pre-covid levels.

F15. VISITATION, CENTRAL HIGHLANDS, 2013-22



Source: NVS/IVS, Tourism Research Australia, 2013-22

T16. VISITATION, CENTRAL HIGHLANDS, 2017-22

	Ave visitation p.a. (2017-22)	Change (2017-22)	Change % (2017-22)
Daytrip Visitors	100,377	+45,441	+61%
Overnight Trips	84,259	+19,543	+7%
International Trips	5,474	+3,030	+48%
Total	**190,110**	**+68,014**	**+45%**

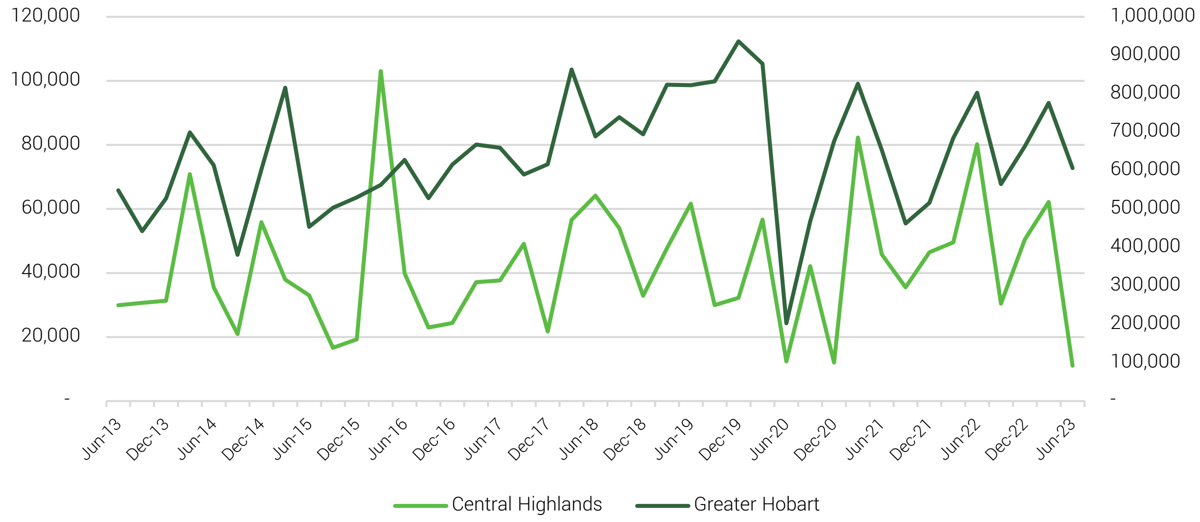
Source: Urban Enterprise, derived from NVS/IVS, Tourism Research Australia, 2017-22

4.3.1. SEASONALITY

Figure 14 shows the quarterly visitation in Central Highlands and Greater Hobart. Visitation to the municipality is seasonal, with peaks in visitation occurring in the March quarter throughout the summer period.

The June, September and December quarters represent the shoulder and off seasons, with lower visitation (on average). Greater Hobart follows a similar trend to Central Highlands, including consistent peaks in visitation during the March quarter.

F16. QUARTERLY VISITATION, CENTRAL HIGHLANDS, JUN 2013 TO JUN 2023



Source: Urban Enterprise, derived from NVS/IVS, TRA, 2013-23

4.4. VISITOR MARKET PROFILE

4.4.1. OVERVIEW

Table 17 provides a snapshot of the visitor profile in Central Highlands, and provides a comparison with Greater Hobart. Key observations include:

- Holiday/leisure travellers account for 80% of visitation.
- The holiday home market is a key driver of visitation, with 30% of overnight visitors staying in their own property or a friends/relatives property.
- Central Highlands is a highly popular camping and caravan destination.
- The average length of stay for overnight visitors is 2.2 nights, which indicates that Central Highlands is a popular 'weekend escape' destination.

T17. VISITOR MARKET PROFILE, CENTRAL HIGHLANDS

	Central Highlands	Greater Hobart
Purpose of visit	Holiday (80%) Business (11%) Visiting friends and relatives (8%) Other reason (1%)	Holiday (51%) Visiting friends and relatives (23%) Business (15%) Other reason (11%)
Travel group	Adult couple (40%) Friends or relatives (32%) Family (13%)	Adult couple (34%) Family (23%) Friends or relatives (23%)
Origin	Tasmania (63%) Queensland (12%) Victoria (10%)	Tasmania (31%) Victoria (29%) New South Wales (20%)
Activities	Social activities (57%) Outdoor / nature (33%) Active outdoor / sports (29%)	Social activities (77%) Outdoor / nature (26%) Arts / heritage (23%)
Accommodation	Caravan or camping (27%) Hotel/motel/motor Inn (20%) Friends or relatives property (15%) Own property (15%)	Hotel/motel or motor Inn (45%) Friends or relatives property (28%) Rented house/apartment (10%)
Ave length of stay	2.2	4.4

Source: NVS, TRA, 2013-22

4.4.2. VISITOR ACTIVITIES

Central Highlands has a clear tourism advantage in natural and water-based experiences, evidenced by:

- 21% of visitors experience national and state parks, compared with 9% in Greater Hobart;
- 21% of visitors go bushwalking, compared with 9% in Greater Hobart; and
- 17% of visitors go fishing, compared with 2% in Greater Hobart.

Eating out at restaurants and cafes is significantly underrepresented in Central Highlands compared with Greater Hobart, indicating that the hospitality offering is a product gap in the region.

T18. TOP VISITOR ACTIVITIES, CENTRAL HIGHLANDS, 2015-19 (AVE)

Top Activities	Central Highlands	%	Greater Hobart	%
Eat out / dine at a restaurant and/or cafe	56,447	33%	1,609,576	55%
Sightseeing/looking around	38,062	22%	730,757	25%
Visit national parks / state parks	35,954	21%	259,076	9%
Bushwalking / rainforest walks	35,508	21%	258,628	9%
Fishing	29,918	17%	59,547	2%
None of these	26,740	16%	297,300	10%
Visit friends & relatives	25,629	15%	876,845	30%
Picnics or BBQs	18,030	11%	89,296	3%
Visit pubs and clubs	15,151	9%	364,053	12%
Visit history / heritage buildings and sites	13,792	8%	253,910	9%

Source: NVS, TRA, 2013-22

4.5. KEY POINTS

- The local tourism industry is an important sector in the Central Highlands economy. The region attracts around 190,000 visitors per annum, and has grown consistently over the past decade.
- The region is home to a network of lakes, rivers, National Parks and conservation areas. These natural assets are a comparative advantage for the region, and a key motivator for visitors, especially for hiking, fishing and experiencing national parks and conservation areas.
- Seasonality is an existing challenge, with the majority of visitation occurring throughout the summer months.
- The hospitality and retail offering in townships is very limited, and may not be meeting the needs and preferences of visitors.

5. ACTIVITY CENTRES

5.1. INTRODUCTION

This section provides an assessment of activity centres within and surrounding Central Highlands, with a focus on the town centres of Bothwell, Ouse and Hamilton.

The assessment provides an overview of the economic role performed by each centre and the catchment areas that they serve. An audit and description of the business mix, retail and commercial offering is also provided.

5.2. ACTIVITY CENTRE HIERARCHY

An activity centre hierarchy identifies and categorises the role of retail and commercial centres within a catchment area according to the scale of floorspace, the diversity and mix of retail and commercial amenity available, as well as public accessibility.

The hierarchy typically indicates where resident and visitor expenditure is directed, based on the economic role, location, retail and commercial offering and mix of each centre and the catchment it serves.

A regional activity centre hierarchy has been established for Central Highlands. The regional catchment is shown in Figure 17, and the activity centre hierarchy is summarised in Table 19.

Bothwell, Hamilton and Ouse are local town centres that service the local resident population and visitors either staying in town or travelling through. All three centres have a very limited retail and commercial offering. As a result, residents are required to travel outside of the municipality for higher order retail and commercial needs that are unavailable locally and in Central Highlands. This includes full-line supermarkets, speciality retailers (butcher, bakery), retail services, personal services, clothing, apparel, homewares, bulky goods, and so on.

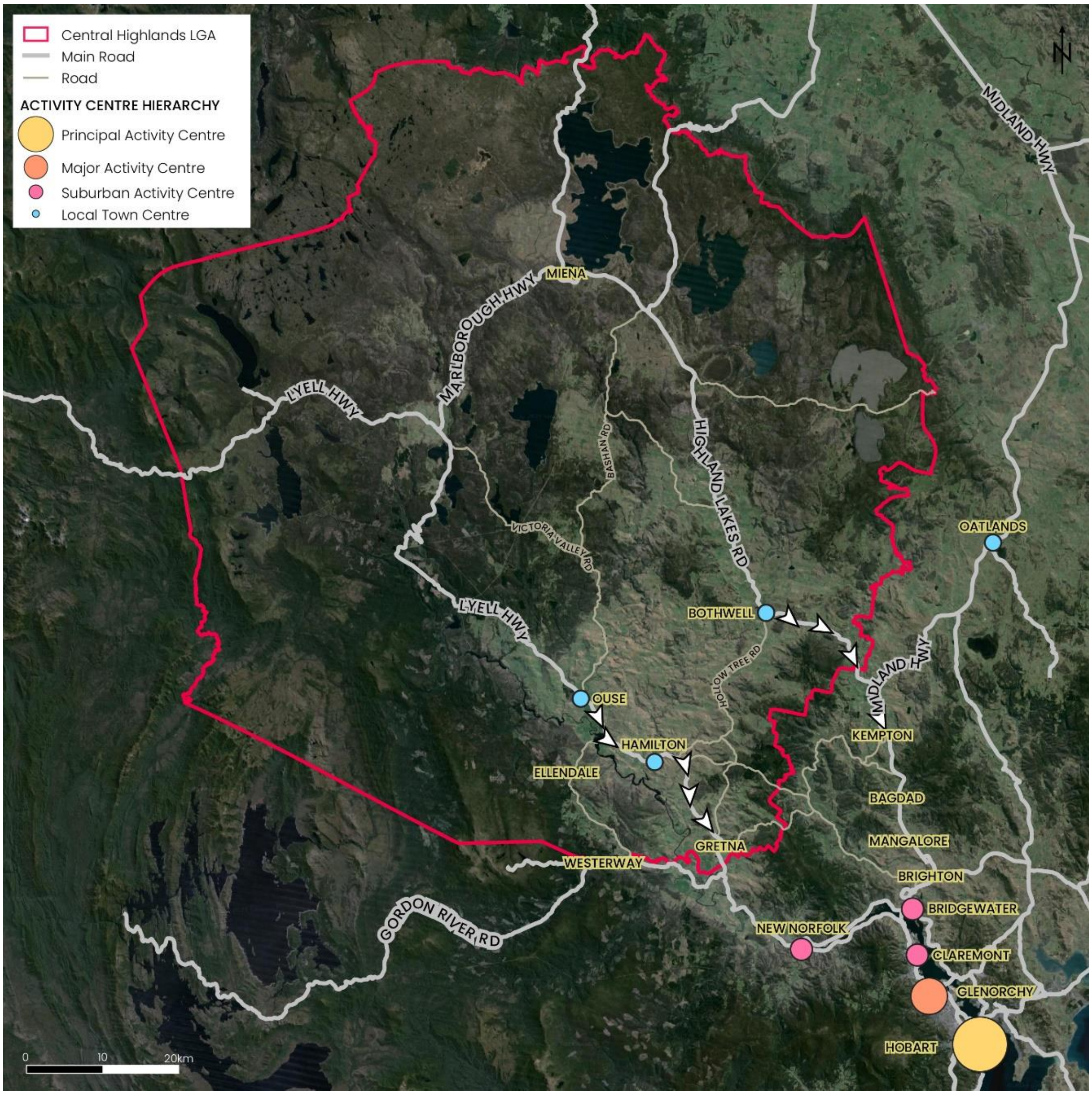
The role of Bothwell's town centre is a combination of community & civic, basic convenience retail and stopover visitor servicing. As shown in Figure 15, Bothwell residents generally travel south along the Midland Highway to Bridgewater, which is a Suburban Activity Centre (approximately 40 min drive). The centre includes two shopping centres that include full-line supermarkets, specialty retailers (butcher, bakery, etc), retail services (pharmacy) and casual eateries.

The role of Ouse's town centre is convenience retail and stopover visitor servicing. Whereas the role of Hamilton is stopover visitor servicing, with hospitality and accommodation only. For higher order retail and commercial needs, residents of Hamilton and Ouse travel south along the Lyell Highway to New Norfolk (approx. 30 mins), which is also a Suburban Activity Centre. The centre includes a full-line supermarket, retail services (pharmacy, newsagency etc), personal services (hair, beauty), casual eateries (cafes, take away, restaurants).

Central Hobart (including the CBD) is the Principal Activity Centre in central, southern and south eastern Tasmania. The centre includes the most substantial amount of floorspace and the greatest diversity and mix of retail and commercial offering, including national brand retailers, department and discount department stores, bulky goods, multiple full line supermarkets, and a significant number of hospitality and tourism operators. The CBD is approximately 70-90km from Hamilton, Ouse and Bothwell (~1hr-1.25hr drive).

Oatlands is local centre that is situated in Southern Midlands; approximately 35 minutes east of Bothwell. Oatlands also has a very limited retail and commercial offering, but does include a small IGA express.

F17. REGIONAL ACTIVITY CENTRE CATCHMENT & HIERARCHY



Source: Urban Enterprise, 2024

T19. ACTIVITY CENTRE HIERARCHY, CENTRAL HIGHLANDS AND SURROUNDS

Activity Centre	Distance from:			Classification	Retail and commercial role/business mix	Anchor Retailers	Supermarket
	Ouse	Bothwell	Hamilton				
Central Hobart (incl. CBD)	90km	75km	70km	Principal Activity Centre	- National brand retailers - Department and discount department stores. - Bulky goods - 2 x full-line supermarkets - Specialty stores - Hospitality	- Woolworths - Myer - JB Hi-Fi - Chemist warehouse	Woolworths (Campbell St ~2,000sqm) Woolworths (Hobart CBD ~4,000sqm)
Glenorchy	80km	70km	65km	Major Activity Centre	- 3 x full-line supermarkets - National brand retailers - Bulky goods - Hospitality	- Bunnings - Spotlight - Big W - TK Maxx - Harvey Norman	Woolworths Northgate (~4,000sqm) Coles Northgate (~4,000sqm) Woolworths (~3,000)

Bridgewater	65km	60km	50km	Suburban Activity Centre	- 2 x full-line supermarkets - Retail services - Other	- Coles - Woolworths - Priceline pharmacy - Reject Shop	Coles (~4,000sqm) Woolworths (~2,500sqm)
New Norfolk	50km	65km	40km	Suburban Activity Centre	- 1 x full-line supermarket - Hospitality - Retail services - Other	- Woolworths - IGA Express - AMCAL - Mitre 10	Woolworths (~2,750sqm) IGA Express (~600sqm)
Claremont	75km	65km	60km	Suburban Activity Centre	- 1 x full-line supermarket - Discount retail - Hospitality	- Woolworths - Reject shop - Bakers Delight	Woolworths (~4,000sqm)
Oatlands	95km	50km	80km	Local Town Centre	- Convenience supermarket - Hospitality	- IGA Express - Celebrations	IGA Express (~400sqm)
Ouse	N/A	50km	15km	Local Town Centre	- Convenience supermarket - General store - Hospitality (pub, café)	- IGA Express	IGA Express (~225sqm)
Bothwell	50km	N/A	30km	Local Town Centre	- General store - Pharmacy - Hospitality (café, pub)		
Hamilton	15km	30km	N/A	Local Town Centre	- Hospitality (café, pub) - Accommodation		

Source: Urban Enterprise, 2024

5.3. TOWN CENTRE AUDIT

An audit of the retail, commercial, tourism, accommodation and civic offering in Bothwell, Ouse and Hamilton has been completed to assist in establishing the current activity centre role of each town.

The audit was undertaken through a review of aerial imagery and verified through site visits.

The current role of Bothwell, Ouse and Hamilton are summarised in Table 20.

T20. RETAIL & COMMERCIAL ROLE

Township	Approx. population	Classification	Role
Bothwell	500	Local centre (small)	Community & civic; Basic convenience retail; and Stopover visitor servicing.
Ouse	300	Local centre (small)	Convenience retail; and Stopover visitor servicing.
Hamilton	240	Local centre (small)	Stopover visitor servicing (hospitality, accommodation)

Source: Urban Enterprise, 2024

5.3.1. BOTHWELL

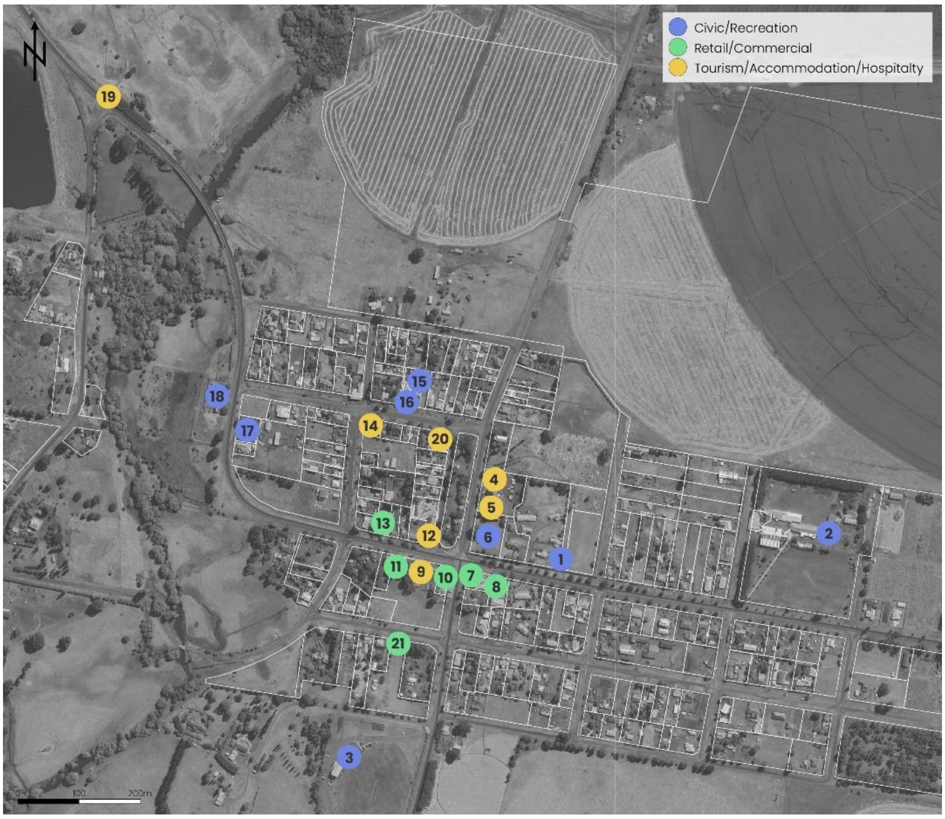
The retail, commercial, tourism, accommodation, civic and recreation uses in Bothwell are shown in Figure 18.

Key observations include the following:

- There is no small or convenience based supermarket in Bothwell.
- Bothwell includes the only pharmacy in Central Highlands.
- There is a Roadhouse and a Superstore that are adjacent to one another, and provide fuel and convenience based goods for locals, visitors and stopover travellers.
- A pub and café are the only hospitality operators in Bothwell.

- There is a Council-owned caravan park in Bothwell that is well-utilised.
- Ratho Golf Course is located to the north west of the town centre, and includes a function centre and accommodation.

F18. TOWN CENTRE AUDIT, BOTHWELL



1	St Andrews Catholic Church	Civic/Recreation
2	Bothwell District High School	Civic/Recreation
3	Bothwell Football Club	Civic/Recreation
4	Bothwell Camping Ground & Caravan Park	Tourism/Accommodation/Hospitality
5	Visitor Information & Australian Gold Museum	Tourism/Accommodation/Hospitality
6	St Michael & All Angels Anglican Church	Civic/Recreation
7	Bothwell Super Store	Retail/Commercial
8	Halls Ammo	Retail/Commercial
9	Castle Hotel	Tourism/Accommodation/Hospitality
10	Bothwell Garage Roadhouse	Retail/Commercial
11	Central Highlands Pharmacy	Retail/Commercial
12	Elders	Tourism/Accommodation/Hospitality
13	Australia Post	Retail/Commercial
14	Sealys Cafe & Gifts	Tourism/Accommodation/Hospitality
15	Central Highlands Council	Civic/Recreation
16	Bothwell Library	Civic/Recreation
17	Bothwell Fire Brigade	Civic/Recreation
18	Bothwell Police Station	Civic/Recreation
19	Ratho Farm Golf	Tourism/Accommodation/Hospitality
20	Whites Corner	Tourism/Accommodation/Hospitality
21	Old Bootmaker Shop	Retail/Commercial

Source: Urban Enterprise, 2024

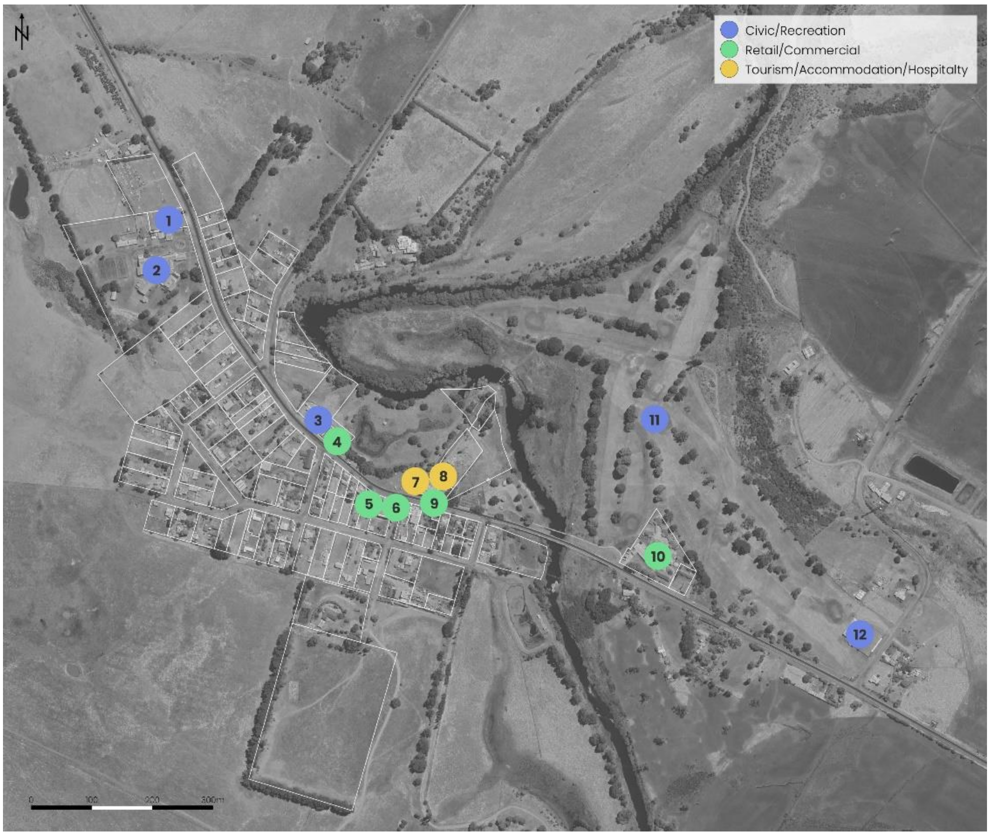
5.3.2. OUSE

The retail, commercial, tourism, accommodation, civic and recreation uses in Ouse is shown in Figure 19.

Key observations include the following:

- Ouse includes the only convenience supermarket in Central Highlands (IGA X-Press)
- There is an existing pub (Lachlan Hotel), which also includes a bakery/café.
- There is a roadhouse that provides fuel and convenience based goods for locals and stopover travellers.
- Ouse includes the only health/medical centre (Moreton Group Rural Health), but is currently closed for maintenance.

F19. TOWN CENTRE AUDIT, OUSE



1	Church	Civic/Recreation
2	Ouse High School (closed)	Civic/Recreation
3	Ouse Fire Station	Civic/Recreation
4	Ampol Roadhouse	Retail/Commercial
5	IGA X-Press	Retail/Commercial
6	Australia Post	Retail/Commercial
7	Ouse Bakery & Cafe	Tourism/Accommodation/Hospitality
8	Lachlan Hotel	Tourism/Accommodation/Hospitality
9	Bottle shop	Retail/Commercial
10	Rural Health Centre (temporarily closed)	Retail/Commercial
11	Community Golf Course	Civic/Recreation
12	Lawn Bowls	Civic/Recreation

Source: Urban Enterprise, 2024

5.3.3. HAMILTON

The retail, commercial, tourism, accommodation, civic and recreation uses in Hamilton is shown in Figure 20.

Key observations include the following:

- Hamilton's retail offering is very limited.
- There is a pub and café (Hamilton Inn).
- There is a Council-owned caravan park (with amenities block) that is well-utilised.
- There is a café located at the northern gateway of town, but is currently closed.

F20. TOWN CENTRE AUDIT, HAMILTON

1	St Peters Anglican Church	Civic/Recreation
2	Victorias Cottage	Tourism/Accommodation/Hospitality
3	Edwards Cottage	Tourism/Accommodation/Hospitality
4	Camping Area	Tourism/Accommodation/Hospitality
5	Hamilton Bistro + Cafe	Tourism/Accommodation/Hospitality
6	Council Offices	Civic/Recreation
7	Hamilton Police Station	Civic/Recreation
8	Unmanned Petrol Pump	Retail/Commercial
9	Showgrounds	Civic/Recreation

Source: Urban Enterprise, 2024

5.4. KEY POINTS

- Bothwell is spatially separate from Hamilton and Ouse, and largely operates in isolation from these towns. The retail and commercial offering is very limited in Bothwell, but the town performs an important civic, recreation and community role that differentiates it from Hamilton and Ouse.
- The resident catchment in Bothwell (~500 residents) is not currently of a scale that could viably support notable retail and commercial growth. If the resident population in Bothwell recorded notable growth over time, there would be an opportunity for the town to support new speciality and/or convenience based retailers (e.g. bakery, butcher, convenience supermarket). It is likely however, that residents would continue to be directed to higher order centres such as Bridgewater and Greater Hobart for higher order needs (e.g. full-line supermarket, bulky goods, etc).
- The town centres of Hamilton (~240 residents) and Ouse (~300 residents) primarily perform a visitor servicing/stopover tourism role. The visitor servicing role for all three towns is important in sustaining the viability of existing operators, given the small local resident population.
    - No retail and commercial operators currently exist in Hamilton, and therefore local retail needs cannot be met in the town.
    - Ouse includes a small IGA express, which serves residents of Ouse and Hamilton for convenience based goods.
    - Local residents of Ouse and Hamilton typically travel to New Norfolk and/or Brighton for higher order retail and commercial needs.
- To catalyse retail and commercial investment that aligns with the activity centre role of towns, it is likely that a higher level of demand is needed; from a combination of residents and visitors.

6. LAND SUPPLY

6.1. INTRODUCTION

This section provides an assessment of land supply in the townships of Bothwell, Ouse and Hamilton. The purpose of the assessment is to identify the quantum and availability of zoned land supply that can theoretically accommodate future residential and business growth.

6.2. METHODOLOGY

The following methodology has been adopted for this assessment:

- Define the study area and zones to be included, which include:
  - Bothwell, Ouse and Hamilton;
  - Village Zone (VZ), Low Density Residential Zone (LDRZ) and Rural Living Zone (RLZ).
- Using GIS, property boundaries, and planning zones, identify vacant and underutilised broadhectare sites that are theoretically available for development and/or consumption.
  - Broadhectare is defined as a site with an area that is 1 ha or greater.
  - Vacant is defined as having no structures featured, no definitive use or activity apparent on site.
  - Underutilised is defined as having a structure featured on a small portion of the site where partial occupation is evident, but not full utilisation of the site.
- Manually verify vacant and underutilised sites in collaboration with Central Highlands Council, and supplement by reviewing satellite aerial imagery (NearMap)

It is important to note that the VZ has the flexibility to accommodate residential, community and commercial uses.

6.3. LAND SUPPLY SUMMARY

Vacant and underutilised land supply in Bothwell, Ouse and Hamilton is summarised in Table 21. Across the three settlements, there is a total of:

- 33.68 ha of vacant land supply - The majority of vacant land supply is located in Hamilton (54%), followed by Bothwell (38%); and
- 54.04 ha of underutilised land supply - The majority of underutilised land supply is located in Hamilton (54%), followed by Bothwell (42%).

Each settlement is assessed in detail on the following pages.

T21. LAND SUPPLY SUMMARY, BTOHWELL, OUSE & HAMILTON

Vacant	Bothwell	Ouse	Hamilton	Total
Village	2.28ha (10 lots)	2.83ha (15 lots)	11.17ha (31 lots)	16.28ha (56 lots)
Low Density Residential	0.43ha (4 lots)	-	6.91ha (6 lots)	7.35ha (10 lots)
Rural Living	10.06ha (6 lots)	-	-	10.06ha (6 lots)
Sub-Total	*12.77ha (20 lots)*	*2.83ha (15 lots)*	*18.08ha (37 lots)*	*33.68ha (72 lots)*
Underutilised	Bothwell	Ouse	Hamilton	Total
Village	0.25ha (1 lot)	-	10.21ha (7 lots)	10.45ha (8 lots)
Low Density Residential	1.87ha (1 lot)	-	-	1.87ha (1 lots)
Rural Living	8.04ha (4 lots)	-	-	8.04ha (4 lots)
Sub-Total	*10.15ha (6 lots)*	-	*10.21ha (7 lots)*	*20.36ha (13 lots)*
Total	22.92ha (26 lots)	2.83ha (15 lots)	28.29ha (44 lots)	54.04ha (85 lots)

Source: Urban Enterprise, 2024

6.4. BOTHWELL

Land supply analysis reveals that Bothwell has:

- 2.28ha of vacant Village zoned land across 10 lots, and further 0.25ha of underutilised land;
- 0.43ha of vacant Low Density Residential zoned land across 4 lots, and a further 1.97ha of land within one underutilised site.
- 10ha of vacant Rural Living zoned land across 6 lots, and a further 8ha of underutilised land across 4 lots.

Village Zoned land that is vacant and available for consumption in Bothwell is scarce. There is limited capacity for the urban area of Bothwell to accommodate subdivision and new housing development. Existing capacity within Village Zoned land is mostly confined to individual sites that could accommodate a single dwelling or small subdivision.

Based on a minimum subdivision area of 600sqm, vacant and underutilised VZ land supply in Bothwell has an estimated theoretical capacity to accommodate around 25-30 new residential lots. Realising this capacity depends on whether individual landowners facilitate residential subdivision. The extent to which this could occur is highly uncertain, particularly given that the VZ can also permit commercial and community uses.

The Rural Living Zoned land to the east of Bothwell's urban area remains vacant and inactive. There may be an opportunity to investigate the expansion of the Village Zone to encompass vacant Rural Living land to accommodate more housing and improve the development viability of areas within the township boundary.

F21. VACANT & UNDERUTILISED SITES, BOTHWELL

Source: Urban Enterprise, 2024

6.5. OUSE

Land supply analysis reveals that Ouse has:

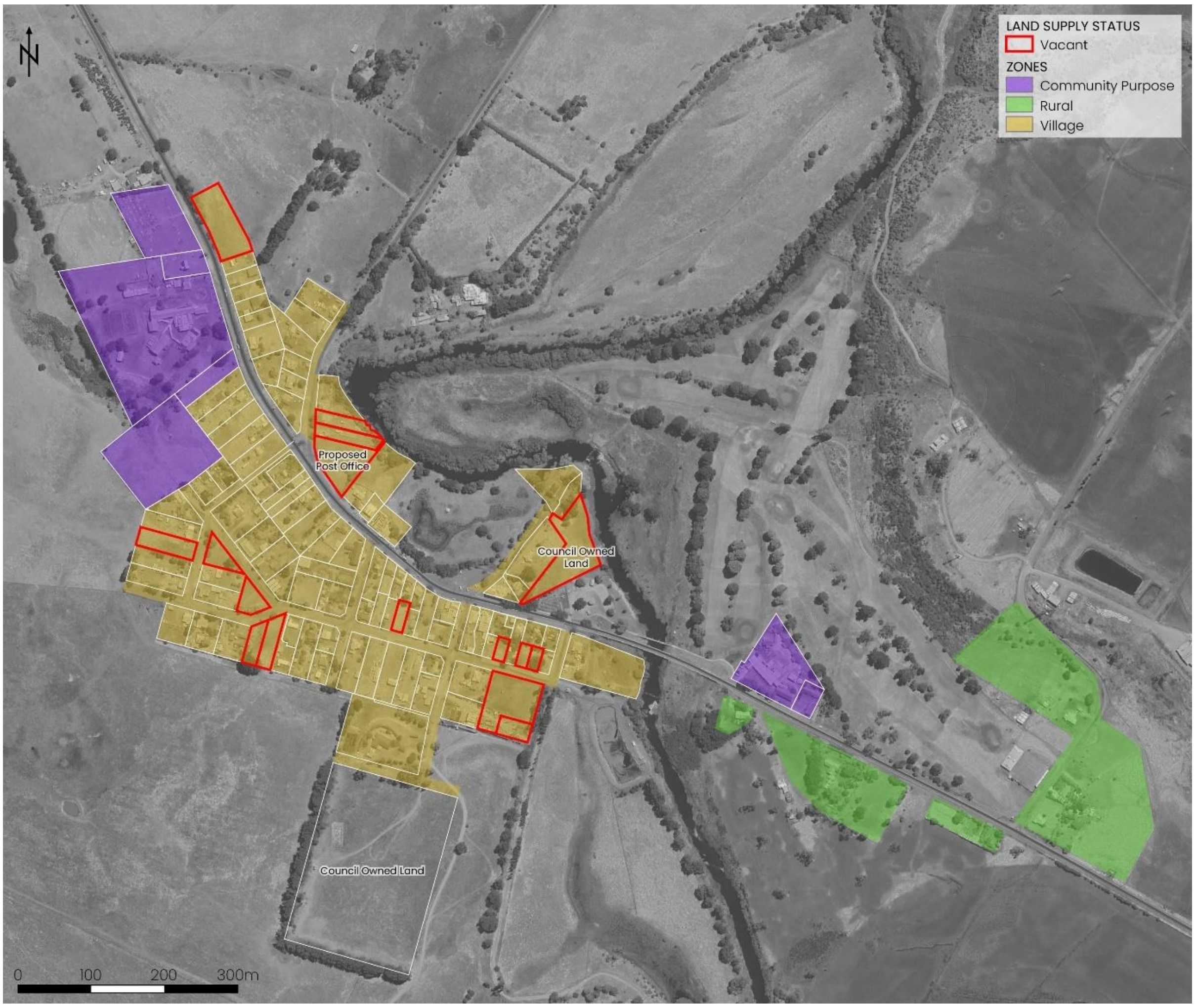
- 2.283ha of vacant Village zoned land across 15 lots.
- There is no Low Density or Rural Living Zoned land in Ouse.

With the exception of several vacant sites, Ouse has limited vacant land supply available, especially compared with Hamilton.

Based on a minimum subdivision area of 600sqm, vacant and underutilised VZ land supply in Ouse has an estimated theoretical capacity to accommodate around 20-35 new residential lots.

There are two vacant Council owned sites to the north and south of the Lyell Highway. The northern site is zoned Village, whereas the southern site is zoned Recreation. There may be an opportunity to investigate more productive use and utilisation of Council owned land.

F22. VACANT & UNDERUTILISED SITES, OUSE



Source: Urban Enterprise, 2024
Note: proposed post office is excluded from land supply figures.

6.6. HAMILTON

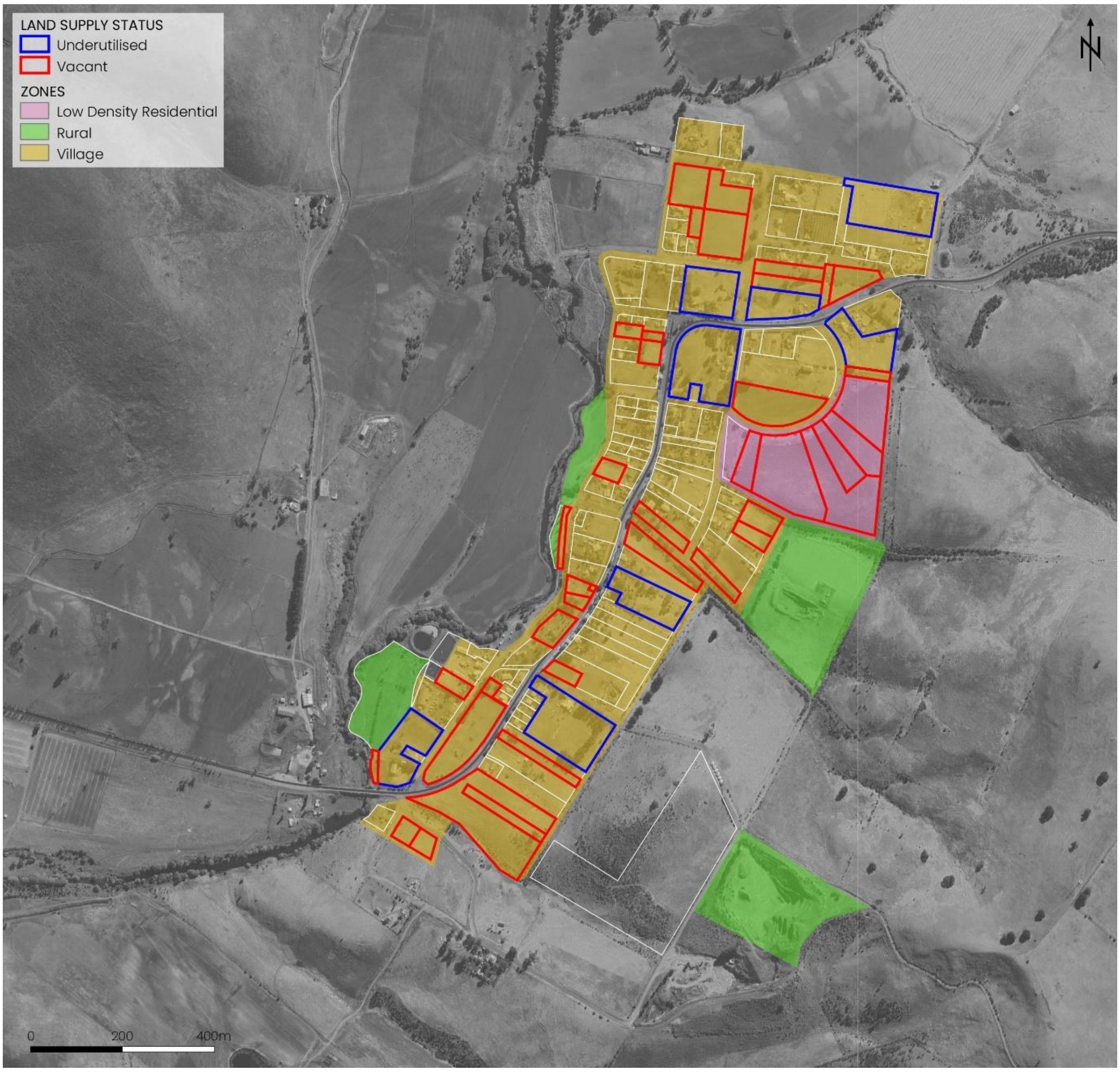
Land supply analysis reveals that Hamilton has:

- 11.17 ha of vacant Village zoned land across 31 lots, and further 10.21 ha of underutilised land across 7 lots;
- 6.91 ha of vacant Low Density Residential zoned land across 6 lots.
- There is no Rural Living zoned land in Hamilton.

Hamilton has the greatest land supply availability in the Village Zone, with several vacant sites concentrated at the northern and southern gateways of the settlement. There is also a cluster of Low Density Residential Zoned sites at the juncture of Ponsonby Street and Arthur Street.

Based on a minimum subdivision area of 600sqm, vacant VZ land supply in Hamilton has an estimated theoretical capacity to accommodate around 80-100 new residential lots. Theoretical lot capacity in Hamilton increases substantially when adding underutilised land supply.

F23. VACANT & UNDERUTILISED SITES, HAMILTON



Source: Urban Enterprise, 2024

7. ISSUES & OPPORTUNITIES

A suite of economic related issues and opportunities emerged through research and analysis presented in this report, as well as targeted stakeholder consultation with industry, government and community representatives.

Urban Enterprise consulted with multiple stakeholders, which included a mix of businesses, landowners and community representatives (see Appendix B for summary). Niche Planning Studio also conducted community workshops in each of Bothwell, Hamilton and Ouse.

Issues and opportunities are summarised in this section, and are categorised as follows:

- Economy and employment;
- Population and housing; and
- Tourism.

Issues and opportunities will be addressed in the economic development strategies in the following section.

7.1. ECONOMY & EMPLOYMENT

Economic Drivers & Industry Mix

- The economy in Central Highlands is underpinned by the environment, natural assets, resources and productive soils. The secure and reliable access to water via well-established irrigation schemes, and the availability of water assets is critical to the function and productivity of the regional agricultural, horticultural and energy sectors.
- Natural assets and advantages have culminated over time to establish economic specialisations in agriculture, horticulture, aquaculture, energy production, forestry and tourism. Economic specialisations should be maintained and enhanced.
- The economy is primarily reliant on agriculture for productivity (output), value and employment. Greater diversification in the economy should also be encouraged to further support economic resilience.
- Agriculture is a critical and specialised industry in Central Highlands. There is an opportunity to strengthen agriculture through supply-chain and value add activities.
- An increase in intensive agricultural uses (e.g. cropping, horticulture) in the region is evident. This is likely linked to the secure access to water from the Southern Highlands Irrigation Scheme, which commenced in 2017.

Labour Force

- There is lower labour force participation in Central Highlands compared with Tasmania due to an older population, an ageing workforce, and low population growth.
- Attracting and sourcing workers is a current challenge faced by businesses.
- Existing businesses will continue to be impacted by labour shortages without replenishment of residents of working age.
- Labour shortages is a current barrier for new business entrants in Central Highlands.

Retail and Commercial Offering

- The retail and commercial offering is extremely limited in Central Highlands. Essential commercial and retail amenity is underrepresented in Central Highlands, including retail, health care/medical, education and construction. Provision of more population services (e.g. health care, medical, aged care) in key towns will be important to enhance liveability and support existing residents.
- Residents are required to travel outside of the municipality for essential retail, commercial and health care goods and services.

- Currently, the population is too small to viably support new retail, hospitality and commercial operators. Population and visitor growth will be critical to attracting new retail and commercial businesses.
- There are some examples of retail and commercial premises in town centres being converted into housing. The adaptive re-use of retail/commercial properties should be discouraged where possible to protect commercial/retail premises within town centres, and encourage new operators to establish.

Investment Opportunities

- Population-service industries are underrepresented. Attracting new retail, hospitality and health-related businesses to establish in Ouse, Hamilton and Bothwell should be encouraged.
- The region is well placed to attract renewable energy investment, especially hydropower, wind and solar. Renewable energy projects typically generate a high number of jobs during the construction phase, and a low number of jobs during the operational phase. However, a critical mass of projects may attract new permanent workers to the region.
- Renewable energy projects such as solar and wind farms have the potential to raise municipal rates and community funds, which could be directed for community benefit. Determining how these funds should be spent within the community should be considered.
- Renewable energy projects can create environmental and amenity impacts, and should sought to be minimised where possible, especially linked to economic productivity.
- Commercial and industrial businesses are accommodated in the Village Zone within townships, and there is currently no standalone land areas or precincts dedicated to industrial and commercial activities. There may be an opportunity to investigate establishing an industrial and/or commercial precinct in the region that is well-located, has service capabilities, and is strategic in terms of serving supply-chain activities from key industries such as horticulture and renewable energy projects.

Critical Infrastructure & Services

- The internet service, speeds and coverage is fairly unreliable across Central Highlands, which limits digital access and connectivity.
- The road network in Central Highlands is critical for accessibility and connectivity for residents, workers and businesses. The condition and maintenance of regional roads is an ongoing issue.
- There is a lack of public transport available in Central Highlands.

7.2. POPULATION & HOUSING

Population Retention & Attraction

- Central Highlands has a very small population base, with negligible population growth recorded over the past decade. Low growth will challenge the prospect of economic growth, especially industries that rely on population-based demand.
- Population retention and attraction will be critical for economic resilience and growth, particularly attracting young to middle aged working families. This typically relies on suitable housing, employment and community infrastructure and services to be available and/or accessible.
- Central Highlands has a series of advantages that could be better promoted to attract residents and visitors, including the regional lifestyle, housing affordability, the heritage characteristics of townships, and the natural environment.

Housing

- Low dwelling growth and very limited residential development is evident. This is from a combination of low population growth, but also scarcity of readily developable sites that are available to the market.

- More investment in new housing should be encouraged in the main settlements of Bothwell, Ouse and Hamilton. According to landowners and developers, the viability of residential subdivision and development is marginal.
- Zoned land supply that can accommodate housing is limited in Bothwell, especially in the Village Zone. There is a need to ensure that the urban area has suitable land supply available to accommodate more housing. Logical expansion of the Village Zone could be considered to encourage more housing to be delivered in Bothwell. This could also address viability challenges of residential development.
- A greater supply of vacant Village Zoned land is available in Hamilton, but very limited housing demand is evident.
- Major investment and infrastructure projects planned in the region such as Tarraleah Hydropower redevelopment and St Patricks Plains Wind Farm will attract a notable number of workers to the region during the construction phase of the project. Accommodating key workers in the region will be a major challenge due to the lack of rental housing, commercial accommodation and short term rentals available in the region.
- Strategic Council owned sites within existing settlements present an opportunity to facilitate the establishment of modular affordable and/or key worker housing.

Demographic Trends

- Central Highlands has an aging population, with a higher proportion of older cohorts (e.g. seniors, elderly).
- The aging of the resident population is expected to continue over time, and is likely to increase demand for health care and medical services, as well as aged care facilities.
- Central highlands has a higher level of socioeconomic disadvantage compared with the national average. This is more than likely attributed to lower labour force participation and low access to essential services such as health care, medical services, and so on.

7.3. TOURISM

- The region has high tourism and visitor growth potential, primarily linked to the natural advantages of the area.
- The towns of Ouse, Hamilton and Bothwell all receive a high number of visitors travelling through and stopping over, particularly from self-drive camping and caravan visitors. These towns could perform a greater visitor servicing role.
- There is a high level of self-drive visitors that travel within and across the region, including a high proportion of caravan/RV's. There is a need to ensure that visitor preferences are being met through infrastructure, services and amenity.
- The Council owned and operated caravan parks in Bothwell and Hamilton are well utilised. There may be an opportunity to improve and/or expand the offering.
- Potential for greater activation and promotion of signature nature and water-based experiences, including hiking, camping, fishing, cycling and kayaking.
- There is an opportunity to support further development and investment in farm gate and agri-tourism.
- There is an opportunity to support further development and investment in visitor accommodation and hospitality offering.
- Destination functions and events are an effective way to attract visitors to the region. Supporting existing and new events that attract visitation and align with regional strengths should be encouraged.
- The heritage townships of Hamilton and Bothwell could seek to attract new visitor market segments such as higher yielding couples and families from Greater Hobart.
- There is a potential for Central Highlands to improve destination branding and increase destination awareness as a key region in central Tasmania.

8. ECONOMIC DEVELOPMENT FRAMEWORK

8.1. INTRODUCTION

This section outlines the economic themes, strategies and actions that will guide economic development, resilience and liveability in Central Highlands.

The purpose of this section is to inform the Settlement Strategy and Structure Plans for Bothwell, Ouse and Hamilton, as well as support economic resilience and improve liveability in the municipality.

8.2. THEMES

Three overarching themes will guide economic development and resilience in Central Highlands over the planning period.

T22. STRATEGIC FRAMEWORK

Themes		Vision Statement
1	**A Sustainable and Liveable Shire**	The heritage and regional lifestyle attributes of existing settlements and communities will be protected and enhanced. The municipality will seek to attract and retain residents to support sustainable, healthy and liveable communities, and improve the quality of life for residents. The municipality's vibrant and thriving town centres will be core hubs for civic, community, retail and tourist activities.
2	**A Productive and Resilient Economy**	Greater diversification of the economy will be achieved, and specialised industry sectors such as agriculture, horticulture and tourism will continue to grow and prosper.
3	**A thriving tourism sector**	The appeal of Central Highlands as a place to visit will strengthen; primarily linked to the natural assets and charming settlements. Settlements will play a greater role in servicing stopover and destination visitors.

8.3. STRATEGIES & ACTIONS

The following economic and tourism strategies are recommended for Central Highlands:

1. Attract and retain local residents.
2. Enhance townships to support liveable communities.
3. Deliver the Central Highlands Settlement Strategy and Structure Plans for Bothwell, Ouse and Hamilton.
4. Grow the value of the agriculture sector.
5. Support renewable energy and green industry initiatives and projects.
6. Improve digital and transport infrastructure.
7. Support and attract population service industries.
8. Enhance the tourism and visitor service role of Bothwell, Ouse, and Hamilton.
9. Encourage new tourism products and events, that align with regional strengths.
10. Improve activation and accessibility of the region's signature water and natured based assets.

The suite of recommended actions across each theme are summarised in Table 23.

Strategies and actions are in response to the issues and opportunities identified in section 7 of this report, and have been prepared in the context of the municipal planning framework and broader regional and State priorities.

Actions should be implemented over time in partnership with different levels of Government, local businesses, and the community.

T23. ECONOMIC & TOURISIM STRATEGIES & ACTIONS

Theme 1: A Sustainable and Liveable Shire		
No.	**Strategy**	**Recommended Actions**
1.	Attract and retain local residents.	1.1 Advocate for funding to prepare a Resident Attraction Strategy to attract new residents to live in the municipality, focusing on attracting young and middle aged working families. 1.2 Support new residential development proposals in Bothwell, Ouse and Hamilton; to increase housing supply and provide greater housing choice for existing and new residents. 1.3 Promote lifestyle and affordability advantages of Central Highlands to attract new residents to live and work in the municipality. 1.4 Investigate the potential to utilise strategic Council owned sites in Ouse, Hamilton and Bothwell to facilitate affordable and key worker housing.
2.	Enhance townships to support liveable communities.	2.1 Identify gaps in key public, social and recreational infrastructure and services (e.g. health, education, aged care). Prioritise community needs and apply for funding through relevant State and Federal Government streams to facilitate the delivery of new and improved infrastructure and services. 2.2 Encourage township improvements and initiatives that enhance liveability and social connection such as public open space, streetscape and placemaking improvements. 2.3 Advocate for improved public transport within Central Highlands, including a reinstated bus service (either between Bothwell or Derwent Bridge and Hobart). 2.4 Advocate to the State Government to ensure the sustained operation of Bothwell Secondary School and the Ouse Community Health Centre.

3.	Deliver the Central Highlands Settlement Strategy and Structure Plans for Bothwell, Ouse and Hamilton.	3.1 Ensure the Central Highlands Settlement Strategy and Structure Plans consider the following: • The need for adequate Village Zone land supply that is available and 'development ready' to accommodate new housing, especially in Bothwell. • The need to diversify the housing stock to support changing demographic needs and preferences, especially older/ageing residents. • Direct housing growth to Bothwell and Ouse, and to a lesser extent Hamilton. • Seek to increase the number of rental properties available. • Addressing viability challenges that present barriers to residential development and housing growth in Bothwell and Ouse.

Theme 2: A Productive and Resilient Economy

No.	Strategy	Recommended Actions
4.	Grow the value of the agriculture sector.	4.1 Advocate for ongoing improvements and upgrades to regional irrigation schemes that are fundamental to the agriculture and horticulture sectors. 4.2 Encourage intensive and high value activities, especially within irrigated areas (e.g. cropping, horticulture). 4.3 Support and enhance highly specialised agriculture, forestry and fishing activities in Central Highlands such as livestock grazing, forestry and aquaculture. 4.4 Support agricultural supply-chain, value-add and rural service activities to establish in suitable locations in Central Highlands (e.g. processing, servicing, logistics, etc). 4.5 Promote agriculture, forestry and aquaculture opportunities to industry. These may include: • Export market opportunities; • Domestic market opportunities (e.g. supermarket, wholesalers, farmers markets); • Information around innovation and technology in the agriculture sector that could be harnessed; • Off-farm income opportunities (e.g. renewables); • Value-add opportunities (e.g. recycling waste, food manufacturing, farm gate tourism, agri-education). 4.6 Facilitate and participate in an annual roundtable event for local agriculture industry representatives. Discussion points should include: • The state and outlook for the sector; • Current challenges/barriers to industry growth; • Opportunities for industry growth;

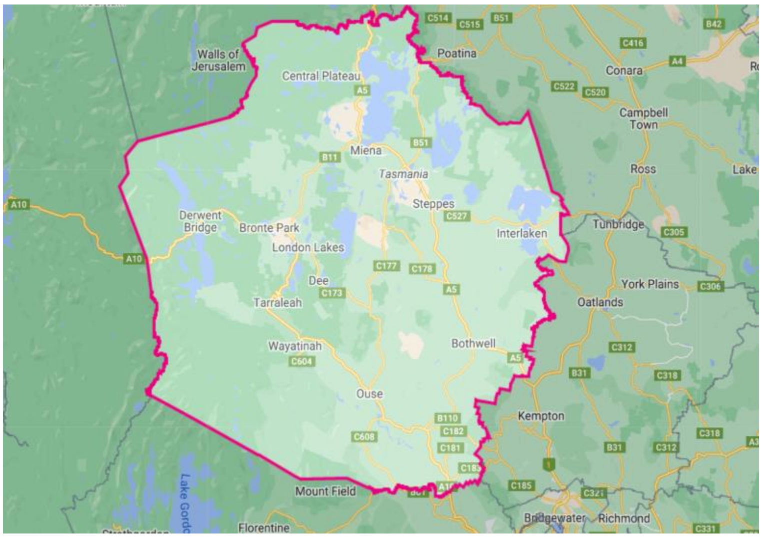
		• The regulatory environment; and • Research and innovation.
5.	Support renewable energy and green industry initiatives and projects.	5.1 Attract renewable energy projects to develop in the Central Highlands Renewable Energy Zone. • Liaise with renewable energy project proponents as they arise (e.g. wind, solar, battery projects). • Seek to minimise environmental impacts of renewable energy projects relevant to landscape, visual amenity, agricultural and biodiversity. • Seek to collect funds from proponents and allocate to community projects and initiatives that improve liveability and socioeconomic outcomes. 5.2 Advocate for, and support new investment in commercial and industrial activities that serve the renewable energy project supply-chain (e.g. A Renewable Industrial Precinct). 5.3 Advocate for ongoing improvements and upgrades to hydro schemes and projects (e.g. Tarraleah). 5.4 Support community-led renewable energy projects in the municipality (e.g. small scale solar farm, waste to energy) and other green initiatives. Projects should consider capacity building and social inclusion across the community, and seek to reduce local energy costs.
6.	Improve digital and transport infrastructure.	6.1 Advocate for relevant road improvements and upgrades to ensure efficient and safe vehicle and freight movements across the municipality. 6.2 Advocate for improved digital and telecommunications infrastructure, including internet coverage, speeds and reliability.
7.	Support and attract population service industries.	7.1 Attract new retail and commercial businesses to establish in Bothwell, Ouse and Hamilton. 7.2 Discourage the conversion/adaptation of retail/commercial premises into residential uses (i.e. housing).

Theme 3: A thriving tourism sector		
No.	**Strategy**	**Recommended Actions**
8.	Enhance the tourism and visitor service role of Bothwell, Ouse, and Hamilton	8.1 Optimise towns to capture the RV market by focusing on providing and improving RV friendly infrastructure. 8.2 Consider expanding and upgrading Council-owned caravan parks in Hamilton and Ouse. 8.3 Attract and encourage investment in new commercial accommodation. 8.4 Review wayfinding and tourist signage in Bothwell, Ouse and Hamilton. 8.5 Identify any gaps in the provision of wayfinding and tourist signs in strategic areas. 8.6 Encourage tourism and community events within and proximate to townships.
9.	Encourage new tourism products and events, that align with regional strengths	9.1 Support growth in visitation related to signature water and nature-based attractions and activities, including hiking, bushwalking, fishing, boating, hunting and camping. 9.2 Attract and facilitate high quality tourism and hospitality operators to establish in Central Highlands. 9.3 Advocate for the re-opening of Nant Distillery north of Bothwell. 9.4 Support agri-tourism and farm-gate experiences on regional properties (e.g. fruit picking, farm-stay, hunting, fishing, etc). 9.5 Support new hiking and cycling trail, and mountain biking experiences in the region. 9.6 Encourage new tourism and community events to be held in the municipality. 9.7 Investigate the productive use and utilisation of the Hamilton Showgrounds for tourism uses, festivals and events.
10.	Improve activation and accessibility of the region's signature water and natured based assets	10.1 Improve promotional and wayfinding signage across popular water and nature-based areas. 10.2 Improve public access and activation of water and nature-based areas (e.g. boat ramps, fishing platforms, picnic areas, etc).

APPENDICES

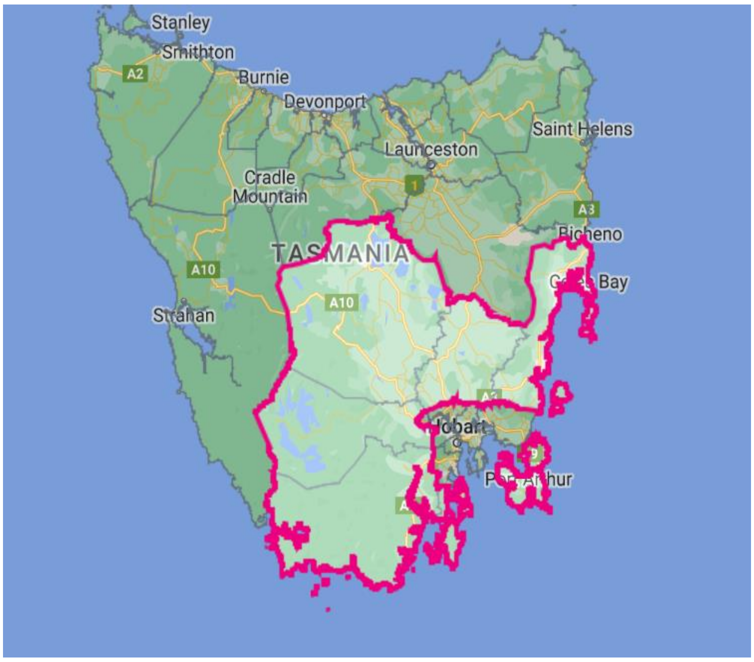
APPENDIX A DATA AREAS

Central Highlands LGA



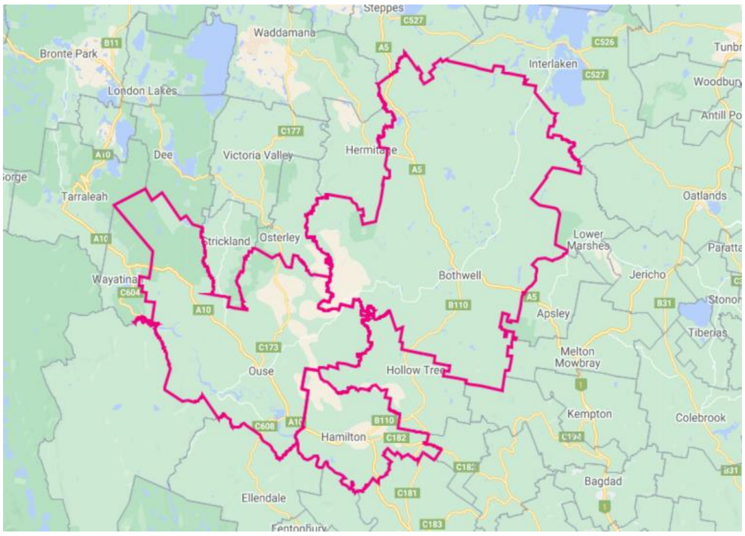
Greater Hobart SA4

South East Tasmania (SA4)*



* Southern Tasmania includes South East Tas (SA4) and Greater Hobart SA4

Bothwell, Ouse, Hamilton (SA1)



APPENDIX B CONSULTATION SUMMARY

Stakeholder	Location/ Town	Date	Format
Central Highlands Council staff	Central Highlands	21/02/2024	In-person Workshop
Ratho Farm	Bothwell	18/03/2024	Phone Meeting
Ouse Post Office	Ouse	18/03/2024	Phone Meeting
Landowner and Business Owner	Hamilton	25/03/2024	Video Meeting
Landowner	Bothwell	26/03/2024	Phone Meeting
Landowner	Bothwell	26/03/2024	Phone Meeting
Bothwell Highschool	Bothwell	02/04/2024	Video Meeting
Hamilton District Agricultural Show Society	Hamilton	09/04/2024	Phone Meeting
Renewable energy proponent	Bothwell	02/05/2024	Video Meeting

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