NORTHERN TASMANIA’S
Regional Economic Development Plan

Growing our future together.

19.6.1 August 2019
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ACKNOWLEDGEMENT

Northern Tasmania Development Corporation acknowledges and respects the Tasmanian Aboriginal community as the traditional and original owners and continuing custodians of this land.
DEAR STAKEHOLDERS

The Northern Tasmania Development Corporation Limited (NTDC) is the regional economic development agency owned by seven councils in Northern Tasmania: George Town; City of Launceston; Break O’Day; West Tamar; Northern Midlands; Meander Valley; and Flinders.

As part of the 2017 Launceston City Deal, NTDC was assigned the responsibility to develop a Regional Economic Development Strategy to ensure the Launceston City Deal was of benefit to the surrounding region by setting out a vision for the Northern Region and identify where future economic growth and employment is likely to come from.

The strategy has been prepared by NTDC and is set out in this Regional Economic Development Plan (REDP or the Plan). For the purposes of this Strategy, the functional economic region of Northern Tasmania encompasses the eight local government areas (LGAs) of George Town, City of Launceston, Break O’Day, West Tamar, Northern Midlands, Meander Valley, Dorset and Flinders.

The Plan belongs to the whole region. NTDC’s ongoing role is to advocate, facilitate, coordinate, support and monitor regional outcomes and to work with stakeholders to refine and review the proposed strategies.

The Plan sets out a long-term economic vision and associated strategies for the Northern Tasmania. It builds on the economic strengths and specialisations of the region to guide economic strategies and investment and to ensure long-term sustainable development. The Plan also builds on strategies already in place to provide a comprehensive approach to the region’s economic journey. It will be supported by an Implementation Plan which will be updated annually and will include prioritised areas for actions and performance measures.

Importantly, the Plan should be viewed as the first stage of a process that establishes a collaborative framework for the region, in planning our future economic activities.

It provides a vehicle for engaging the community in a conversation about regional needs and priorities, assists in bringing together key stakeholders, facilitates access to enabling resources, and assists to focus activities around regional economic opportunities.

Thank you to the more than 100 enterprises interviewed, the Northern Tasmania LGAs that actively participated in the whole process, along with key stakeholder organisations, the broader regional community representatives. The many State Government officers, and the Federal Government and other representatives on the City Dela Board. Thank you also to the National Institute of Economic and Industry Research (NIEIR) for their decades on economic experience and analysis.

Many private and public sector representatives and individuals participated in workshops, taskforces, and provided feedback and advocated for change. The Plan was a collaborative effort – and collaboration is the way forward.

NTDC Board

John Pitt, Chair.
Introduction

The Northern Tasmania Regional Economic Development Plan (the Plan) has been developed as a commitment of the Launceston City Deal to ‘set out a vision for Northern Tasmania and identify where future economic growth and jobs are likely to come from’.

The Plan is a strategic positioning document with a long-term system-wide view on the key strategic priorities required to improve the economic outcomes of Northern Tasmania.

The region has a myriad of positive attributes including; natural assets, industry specialisations, core competencies and a strong innovative and commercial history. Business and community leaders have a passion for our places, community development, and equal opportunity. The Plan commits to build on the Northern Region’s natural assets and the depth of human capital to take the economy to the next level of regional empowerment, prosperity and independence.

The Plan sets out the vision for Northern Tasmania and strategies to realise the vision by:

- Outlining the regional endowments and specialisations
- Identifying the challenges the region is facing in achieving economic growth
- Defining the vision for the region
- Setting out the strategies to achieve the vision and outlining the priority areas for action
- Stating how the plan will be implemented
Background

The functional economic region of Northern Tasmania and its constituent LGAs is shown in Figure 1.

Northern Tasmania is centred around the City of Launceston (population 66,000) and is surrounded by seven municipalities in North East Tasmania that are largely farming, forestry, and tourism areas. In 2016 Northern Tasmania had 145,000 residents. In recent years population growth has been slower than in Australia as a whole, the population is older than the Australian average, less educated, and less multicultural.

Economic development in Northern Tasmania was founded on its rural resources. Fast and effective transport allows residents of Northern Tasmania to access out-of-region services, and businesses to compete in markets outside the region. Northern Tasmania trades with the other two Tasmanian regions, with the regions of greater Australia and with the world at large.

Most regional services are provided by Launceston, though higher-order services are provided by Melbourne, Sydney and Canberra and most State Government services are headquartered in Hobart.

### Northern Tasmania's Regional Economic Development Plan

Population in 2016: 145,033
ABS ERP 2018

Gross Regional Product: $7.85 million
NIEIR 2018

Annual exports: $5.4 billion Population
NIEIR 2017/2018

Local jobs: 66,762
NIEIR 2018

Median weekly household income: $1,015
ABS 2016

Unemployment rate: 6.2%
ABS Labour Force Survey March 2019

Trade qualification: 22%
ABS 2016

University qualification: 14%
ABS 2016

SEIFA index of disadvantage: 948
ABS 2016
Launceston City Deal

In April 2017 the Launceston City Deal was signed. This five-year agreement between The Australian and Tasmanian Governments and the City of Launceston will maximise Launceston’s potential by focusing on the following objectives: jobs and skills growth; business, industry and population growth; a vibrant, liveable city; innovation and industry engagement; and a healthy Tamar Estuary.

The City Deal includes two significant initial commitments to invest within the City;

› The construction of a new campus of the University of Tasmania at Inveresk, close to the CBD

› The City Heart project to remodel and revitalise key spaces in the Launceston CBD

In addition, the City Deal recognises the relationship of the City and its surrounding regions, and provides for this Plan to be completed to leverage economic opportunities for the Northern Tasmania region as a whole.

Building on the Northern Regional Futures Framework

The Northern Regional Futures Framework was developed by NTDC’s predecessor (Northern Tasmania Development) in 2015 and identified three main industries as pillars of the regional economy:

› Food and Agribusiness

› Tourism

› Competitive manufacturing

And set three regional economic growth targets for the next decade (2025):

› 50% GRP growth (or 5% per annum including CPI);

› 8,000 net jobs growth; and

› $100/week increase in average take home pay.

These targets are ambitious, particularly compared with actual economic performance over the past five years.
Developing the plan

The steps taken to develop The Plan

<table>
<thead>
<tr>
<th>Step One</th>
<th>Launceston City Deal called for a regional vision through the development of an economic development strategy for Northern Tasmania.</th>
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<tbody>
<tr>
<td>Step Two</td>
<td>Analysis of existing plans and intent to seek to achieve the targets set by the Futures Framework.</td>
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<tr>
<td>Step Three</td>
<td>Key Directions Report – to understand where we are and what needs to be done to achieve the targets.</td>
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<tr>
<td>Step Four</td>
<td>Regional Consultation – with 100 progressive businesses plus stakeholder organisations.</td>
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<td>Step Five</td>
<td>Development of the Draft REDP for discussion with stakeholders and City Deal Board.</td>
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<tr>
<td>Step Six</td>
<td>The REDP Final Document</td>
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</table>

In developing this Plan, NTDC has established a consultative framework to ensure contribution from a wide range of representative regional voices, including the following regional partners/stakeholders:

- A Steering Committee – made up of representatives from: University of Tasmania (UTAS), Department of State Growth, Office of Coordinator General, Launceston Chamber of Commerce, RDA Tasmania, Skills Tasmania, Tourism Northern Tasmania, NRM North and NTDC Board
- General Manager’s Reference Group - including the General Managers of the seven NTDC member Councils in the region
- Launceston Chamber of Commerce
- Tourism Northern Tasmania (and East Coast Tourism)
- NRM North
- Regional Development Australia, Tasmania (Northern Office)
- Over 100 progressive enterprises from throughout the Region
- Cityprom
- NTDC Board – with members representing key industry sectors, including agribusiness, tourism, education, manufacturing, health, small business and technology
- Local Health organisations (via the Community and Health Industry Committee)
- Key representative industry bodies and business leaders
- Migrant Resource Centre – North
- Local Health organisations (via the Community and Health Industry Committee)
- City Deal Executive Board
- State Government Agencies
- Commonwealth Government Agencies
- Parliamentary Members from the Region
The regional partners listed above have their own sector-specific strategies that play an important role in the economy and sustainability of our region. NTDC has worked collaboratively with regional partners/stakeholders to ensure appropriate input to the Plan and to reduce the likelihood of duplication with other strategies and plans. Other regional strategies that have been considered in developing this REDP are; the Regional Land Use Strategy, the Greater Launceston Plan, and economic development plans for each local government area.

The National Institute of Economic and Industry Research (NIEIR) were commissioned to develop a Key Directions Report to provide an evidence base to the development of the strategy. This work, along with input from regional stakeholders provided a picture of the region's economic environment, taking into account recent developments, and to consider strategies to meet the targets outlined in the Northern Region Futures Framework. Importantly, the Key Directors Report established that it is unlikely that the targets identified in the Futures Framework will be achieved with a ‘business-as-usual’ approach and continuation of current policies.

Accordingly, this Plan outlines strategies necessary for Northern Tasmania to increase the probability that it will achieve its aspirational economic goals.

**Guiding principles**

Regional unity and success will be delivered through the collective efforts, sharing, support and trust between all stakeholders.

*This Plan is a cohesive community effort and has been developed with a strong collaborative spirit.*

These principles guide the approach to development and implementation of this Plan across the region:

- Collaborate to achieve regional outcomes
- Have respect for all
- Support all regional stakeholders by taking a ‘Best for Region’ approach in our decision-making
- Be receptive to new ideas and challenge the status quo
- Be open and transparent
- Encourage diversity and listen to the voices of all regional networks
- Be curious, encourage learning and ambition
- Aim to be globally competitive
- Learn from our stories of success and failure
Regional Endowments

The regional endowments of Northern Tasmania are those features that form the foundation of the community and the economy.

Culture and Heritage

Launceston and George Town are two of the oldest settlements in Australia with a long history of occupation by the Nation’s First Peoples and characterised by European settlement.

Archaeological research has shown that Aboriginal people occupied Northern Tasmania for at least the past 35,000 years and were, for 20,000 years, the southernmost people on Earth. Tasmanian Aboriginal culture is a fundamental aspect of the Northern region’s mixed cultural heritage.

Historic buildings, old trees and its dispersed network of towns and villages establish a character and life to the region that sets it apart. The imprint of history can be seen clearly in the built environment of Launceston and in particular Launceston’s city centre from City Park through to the Cataract Gorge displays the rich history of Tasmania.

Northern Tasmania has strong cultural values and is increasingly recognised as a creative region. Further development of our cultural and creative assets will link to our innovation capacity and will further enhance the region as an attractive place to visit, live and do business.

Water Security

The region is endowed with a high level of water security; its perennial rivers provide secure water supplies for rural, urban and industrial needs and for hydro-electricity.

Much of the rural land is serviced by irrigation schemes that assist to grow the wealth of Tasmania by developing and enhancing the productive capacity of the State’s agricultural industries. The schemes service pasture for livestock finishing and cropping land for dairy, potatoes, vegetables, poppies, high quality grapes, small seed, wheat, cereal and fodder.

Climate

Climate-change will be attracted to the mild climate ideal for living as well as establishing agricultural activities that need a cooler climate and reliable water supply – such as varieties of wine grapes, poppies, dairy production, lamb and cattle fattening, medicinal cannabis, and other boutique agricultural crops.

Connected and Accessible

Compared with many regions in Australia, Northern Tasmania is highly accessible and connected.

Via award winning Launceston airport, the Region is within an hour of Melbourne and daily flights allow access to Sydney and Brisbane within two hours.

Within the state, Northern Tasmania is well connected north, south, east and west through the road and rail network with Hobart accessible via an easy 2.5 hour drive from Launceston.

Bulk freight facilities are available at the Bell Bay Port and time sensitive freight can be shipped via Devonport providing quick and reliable access to mainland and international markets. The freight and logistics hub developing at Translink, adjacent to the airport, provides additional support for the freight task.

Digital connection is also first class with NBN fibre to the premises available in Launceston City and fibre to the node in many other locations. Premium Gigabyte internet service is also available in areas with fibre to the premises through a locally owned and managed telco.
Innovation

Innovation and invention is in Northern Tasmania's DNA – from Birchall's notepad, the first city in Australia to be lit by a publicly owned hydro electricity supply, the first medical practitioner to perform operations using anaesthetic and the inventor of the humidicrib.

In more recent times, investments in the innovation ecosystem, such as the establishment of the LoraWAN network, Enterprize Tasmania (an innovation hub in Launceston), the continuing growth of the Australian Maritime College and the impending relocation of the UTAS campus to Inveresk, the region continues to innovate, research and create.

Service Hub

Launceston was Tasmania’s first city, proclaimed in 1889. While Hobart is now the capital, the Greater Launceston area continues to service Northern Tasmania as well as providing vital supply chain support to the state through its agriculture and manufacturing foundations.

Regional Leadership

Northern Tasmania has a network of engaged and committed regional leaders focused on delivering a positive future for the region.

This was epitomised in both the development, and now the implementation of the Launceston City Deal. By working together, all three levels of government are ensuring the support, programs and policies are in place for Launceston and the region to succeed.

Healthcare Infrastructure

The region has a strong healthcare and social assistance sector, including a major public hospital, Launceston General Hospital, two private hospitals in Launceston and a district hospital in Scottsdale.

As one of the highest employers in the region, growth in this sector is expected to continue.

Renewable Energy

Northern Tasmania has excellent access to renewable electricity resources (indeed, the smelting industry was originally attracted to Northern Tasmania by electricity contracts). Hydro power is readily available, and is supplemented by high quality wind resources, combined with reasonable solar resources.

Since the commissioning of BassLink, Tasmania is part of the National Electricity Market exporting renewable energy to the mainland and providing added security in times of high electricity demand. A second cable is currently being considered and will provide opportunities to significantly grow the Tasmanian renewable electricity market.

Liveability and Lifestyle

Northern Tasmania provides high quality services and facilities, together with a lifestyle that would be expected of a major metropolitan city, but with a lower cost of living and easy access to world class wilderness and rural regions. The Northern Tasmanian lifestyle is a significant attractor as a potential migration destination for those looking to move out of major cities.

Natural Assets

The region has a mix of urban and rural areas, with fertile soils, high levels of water security and a temperate climate. This provides an advantage for the agricultural and forestry industries in the region.

Northern Tasmania boasts many natural attractions including; five National Parks, the Cataract Gorge in Launceston, internationally recognised food and wine regions, spectacular beaches, wild rivers, mountains, walking trails, world-class mountain bike trails, links golf courses, and more.
Food and Wine

We have it all in Northern Tasmania from lamb and beef, to dairy, fruit, vegetables and wine and cheese! From the growers to the makers, building on the region’s agricultural foundations, there is a strong food and wine industry in Northern Tasmania.

A cool climate, long summer days and reliable water supply provides the opportunity to not only increase the volume of products grown, but also value-added manufacturing.

Harvest Market in Launceston provides an opportunity for local growers to sell quality products direct to the market and has been the launching pad for many food and agribusinesses to grow and establish bricks and mortar shopfronts. It is also a well-known tourist attraction.

In addition to food and wine, the region also harvests and manufactures a large proportion of the world’s supply of licit alkaloid material from poppies used in pain relief medication. Medicinal cannabis is also an establishing industry with opportunities for growing and manufacturing product under new regulations to legalise the industry.

Industrial Capability

Northern Tasmania hosts the State’s largest heavy industrial precinct and supporting light industry activities at Bell Bay and George Town. The precinct is anchored by resource manufacturers Bell Bay Aluminium and South32/Temco.

Specialist manufacturers are also located throughout the region from the manufacturing of components for windfarms, performance bearings, storage tanks and industrial machinery for whisky, wine, cheese, and agriculture.

Education Infrastructure

The region provides an excellent selection of educational facilities, including public and private schools, and tertiary education responsive to international demand and local industry need including; TAFE, Foundry, University College, University of Tasmania and the Australian Maritime College.

The City Deal’s major commitment is the relocation of the UTAS to inner city Inveresk with modern accessible facilities. Coupled with a new defence innovation and design precinct at the Australian Maritime College, Launceston has research and education facilities of international standard.
Specialisations

Northern Tasmania is a diversified regional economy with a wide variety of industries. The region has a significant rural base supplemented by manufacturing, with services (predominantly health and welfare).

The specialities for the region are identified below.

<table>
<thead>
<tr>
<th>Food and Agribusiness</th>
<th>Tourism</th>
<th>Competitive Manufacturing</th>
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<tbody>
<tr>
<td>Combining traditional industry sectors of 'Agriculture' and 'Food and Beverages' can create an industry grouping called 'Food and Agribusiness', which is currently responsible for almost a quarter of Northern Tasmania's exports. The contribution of the agriculture/forestry sector to productivity growth has strengthened and is way ahead of the Australian average. The Agriculture sector in Northern Tasmania is large compared to most other regions and it has performed very well.</td>
<td>Tourism is a significant industry for Northern Tasmania and continues to be a strong contributor to the economy. Tourism is a strong performing growth sector, and is economically significant to Northern Tasmania.</td>
<td>Competitive Manufacturing (including, chemicals, smelting, metal fabrication, wood chipping) currently accounts for a quarter of the region’s exports. The success of this industry sector will be largely determined by international markets and factors operating at the world level, with a large range of outcomes possible over the long term.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Healthcare and social assistance</th>
<th>Professional and technical service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launceston provides school and tertiary education to residents across Tasmania and also interstate and internationally. This is a strong potential growth industry following on from the City Deal investment in the Launceston campus of the University of Tasmania.</td>
<td>Healthcare and social assistance industries make a valuable direct contribution to the state economy, and also indirectly through providing for, and improving, the health and wellbeing of Tasmanians. Tasmania’s healthcare and social assistance industry is the largest single contributor to the economy (13 per cent of GSP) and employment (15.8 per cent of the workforce). Given Tasmania’s ageing population, the healthcare and social assistance industry’s contribution to the economy and society (including jobs) will continue to grow.</td>
<td>Launceston is one of the two Australian non-capital cities with significant exports of financial services. There is opportunity to leverage this competitive strength, and the high quality ICT infrastructure, to promote aligned sectors, such as insurance and superannuation, as well as technology based industries to locate in Launceston.</td>
</tr>
</tbody>
</table>
Challenges

> Over the past two decades Northern Tasmania’s trade has become imbalanced; it now imports considerably more goods and services from the rest of Australia and the rest of the world than it can pay for with its export earnings.

> In recent years population growth has been slower in Northern Tasmania than that experienced in Hobart or the Australian average – although recent trends are indicating improved growth.

> Northern Tasmania has an ageing population, and the working age population is expected to contract significantly over future years.

> Education and qualification levels of Northern Tasmanians are lower that the Tasmanian and Australian averages.

> Investment in non-dwelling capital (civil works, buildings, equipment) is a significant source of productivity growth, and is less in Northern Tasmania than the Australian average.

> Climate change may affect the frequency and magnitude of adverse climate events and may impact agricultural production. Although this is also likely to be an opportunity compared to other parts of Australia.

> Targets to increase economic growth, population and tourism, may increase pressure on affordable housing, infrastructure and the environment.

> Northern Tasmania doesn’t have the digital literacy it should have for the amount of digital connectivity available. Digital literacy and knowledge creation capacity is important for supporting innovation, specialisation and boosting productivity and export activity.

> In some parts of the region, labour participation and productivity is relatively low and not all people within the region share in the benefits of growth.

> For Northern Tasmania, and Tasmania as a whole, size and distance from markets will remain a challenge.

> The seasonality of tourism affects the viability of the sector, future investment and permanency of employment opportunities.
By 2031, Launceston and Northern Tasmania will be Australia’s most liveable and innovative Region, with growing incomes and falling levels of disadvantage.

What will this Vision look like in 2031?

The Northern Tasmanian Region will be a diverse and internationally connected economy, with growing productivity and incomes that will deliver sustainable improvements in quality of life for all residents.

**Exports**
A strong market-based economy that reflects regional attributes – innovative, collaborative, agile, resourceful and many products and services are exported off-Island.

**Population Growth**
More highly skilled people are attracted to the region and residents are upskilled to fill the higher paid jobs.

**Infrastructure**
The region is more internationally and inter-regionally connected to reduce the impacts of distance. Governments work in collaboration with the region to ensure priority regional infrastructure is funded.

**Participation and Productivity**
Our region is diverse, healthy and happy. There is more equality with access to higher paid jobs and quality housing options.

**Innovation**
Businesses add greater value to goods and services via innovation and R&D aligned with the region’s competitive strengths.

**Investment**
Businesses and people with great ideas and skills have access to investment funds to grow and prosper.
Targets

This Plan has adopted ambitious and challenging targets, based on those identified in the Futures Framework. The Plan has been developed with an intention of guiding strategic actions to achieve these ‘aspirational’ targets.

The difference from where we are now and where we want to be:

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>Our targets</th>
<th>2031</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GRP</strong></td>
<td>A $7.8 billion economy</td>
<td>50% GRP growth (achieved after 2031)</td>
<td>An $11 billion economy</td>
</tr>
<tr>
<td><strong>Jobs</strong></td>
<td>Jobs in the region totals 66,892</td>
<td>Additional 8,000 net jobs</td>
<td>76,000 jobs in the region</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td>Household Income per hour worked is ($cvm) $34.9 ($1291 per week)</td>
<td>$100/wk. increase in average take home pay</td>
<td>Household Income per hour worked is ($cvm) $37.3 ($1380 per week)</td>
</tr>
</tbody>
</table>

* All dollar values are consistently measured using – chain volume measures and adopting FY2015 as the Reference Year.
The Strategic Priorities build upon the opportunities presented by the Region’s endowments and industry specialisations. They also aim to address key challenges to the economic development of the region.

The six Strategic Priorities of economic development activity in the region are outlined below. Each key strategy is supported by a set of strategic actions.

A detailed Three-Year Action Plan will be developed with regional stakeholders as the implementation Program. The Three-Year Program will be a dynamic working document that is reviewed and approved annually.

*By delivering actions in the priority strategy areas, the Region will have the opportunity to succeed, grow and ultimately achieve its Vision.*

**Strategic Priorities**

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Increasing Exports</td>
<td>Grow total exports from $5.3B in 2018 to $7.7B in 2031</td>
</tr>
<tr>
<td>2) Population Growth</td>
<td>Increase the number of skilled workers by 10,000 by 2031</td>
</tr>
<tr>
<td>3) Innovation</td>
<td>Increase productivity per hour worked from $65 in 2018 to $89 in 2031</td>
</tr>
<tr>
<td>4) Investment</td>
<td>Increase private and public investment from 1.47B per year in 2018 to 2.25B per year in 2031</td>
</tr>
<tr>
<td>5) Infrastructure</td>
<td>Develop a sustainable pipeline of public and private infrastructure projects that supports our community</td>
</tr>
<tr>
<td>6) Participation and Productivity</td>
<td>Monitor the health and wellbeing and education rates of our community and advocate for continuous improvement</td>
</tr>
</tbody>
</table>
I) Increasing exports

Export Growth will reduce our dependency on Government and enable an increasingly prosperous and self-reliant regional economy.

Business drives economic growth and builds a more successful economy. Growing competitive businesses increases exports to the world, and this creates sustainable, high-paying jobs and boosts the Region's standard of living. To do this, there needs to be an environment in which businesses and people can grow and thrive.

The aspirational target is to increase international and interregional exports by 45% from current levels over the life of the plan. This increase is necessary in order to significantly reduce the current $1.4B/year gap between our region's exports and imports.

Northern Tasmania has unique characteristics and a range of opportunities and challenges. The aim is to build our understanding of these features to unlock economic opportunity and to drive new growth by focusing on opportunities that have the most potential to grow investment, income & jobs.

Encouraging collaboration and clusters to help improve global competitiveness within the region is a current and future focus. Collaboration is not easy, and requires trust and time to fully develop. However, we already see the early benefits of clusters with successful cluster formed by the Bell Bay Manufacturing Zone, FermenTasmania being funded by the Federal Government to formalise a food/fermentation cluster, and an early Food Network in formation.

WHAT IS A FOOD SYSTEM?

A food system includes all processes and infrastructure involved in feeding a population: growing, harvesting, processing, packaging, transporting, marketing, consumption, and disposal of food and food-related items. It also includes the inputs needed and outputs generated at each of these steps.

In Northern Tasmania our Food System will focus on:

- food manufacturing
- food service
- food science
- food and wine (and agricultural) tourism
- other agriculture value-adding
- human nutrition
- fermentation cluster
- related supply chains
- logistics
- the supporting professional and technical services, technology applications
- waste management and related bioenergy
- skill development
- food and agriculture-related education.
Major Export Industry Opportunities

1. Food systems

Agriculture, food and beverage products (‘Food Systems’) stand out as an industry with significant export growth potential in Northern Tasmania. Accordingly, this Plan will prioritise food-related systems. A food system includes all processes and infrastructure involved in feeding a population: growing, harvesting, processing, packaging, transporting, marketing, consumption, and disposal of food and food-related items. It also includes the inputs needed and outputs generated at each of these steps.

Many of these will also develop their own ecosystem and spin-off relationships. Further development of natural resources and regional strengths around niche cool climate food and agriculture with all the related systems, will have a major impact on our economy.

A regional focus on supporting increasing exports for food related systems does not stop the further development and importance of other traditional and emerging industries in the region. Some of the emerging industries include niche maritime and defence sector opportunities, renewable and alternative energy applications, and health-related products and services.

2. Tourism

T2I, the Tasmania’s Visitor Economy Strategy sets a target to reach 1.5 million visitors to Tasmania by 2020. The Strategy is evolving its targets to include visitor yield and visitor dispersal beyond the island’s major cities, and this provides an opportunity for a greater regional focus on tourism for Northern Tasmania. One of the Northern Tasmanian tourism industries key challenges is how to extend the tourism season in the north and develop year-round tourist demand.

3. Education

Education services are an important export to the region (through incoming international and domestic students) and are expected to grow with the developments at UTAS focusing on a new contemporary campus adjacent to Launceston CBD, and regional place-based emphasis for the courses being developed and offered.

The growing student population at UTAS includes some 7,000 international students drawn from more than 100 countries. All students have the opportunity to apply for student exchange or overseas study at more than 100 universities around the world. International students provide important export revenue, and they all add to the global culture of our educational facilities and communities.

4. Competitive manufacturing

Northern Tasmania’s economy is supported by larger minerals and commodity processing industries, which are exposed to global economic conditions and exchange rates. It is therefore important to leverage the skills base that has resulted from these industries over decades to build our capacity in adaptive engineering and manufacturing to attract new industry sectors and businesses.

Competitive manufacturing presents the Region with a crucial opportunity to build and diversify exports. In particular, the design and manufacture of food and agricultural products and technologies is a key comparative advantage for Northern Tasmania. The need for technologies to deliver improved products is now greater than ever, and opportunities to encourage greater expenditure on R&D and gain more first mover advantages on a global scale.
5. Professional, scientific and technical services

Launceston and the North has excellent NBN-enabled infrastructure that could further leverage more professionals and technology-based industries to relocate to the area, or for more workers to work remotely from many locations in the region.

Many specialised services are currently provided by telecommuting and providers who drive from Hobart or fly from Melbourne, and there is an opportunity to embed local providers for the region (and these may service markets outside the region).

Northern Tasmania is one of the few regions that exports financial services. Maintaining and building on this strength will require support from financial institutions in the region. There is opportunity to leverage this competitive strength to promote aligned sectors, such as insurance and superannuation to locate in Launceston.

There are opportunities to build health exports by establishing a competitive advantage in a range of regional health provision areas such as service delivery, education, investment, research, integration, technology, collaboration and workforce development. As the region’s largest employer and industry sector, export opportunities for the health sector are being investigated by the Community and Health Industry Committee supported by the Launceston Chamber of Commerce. Initially this work will focus on opportunities for import replacement and may expand to health-related exportable products and services in the future.

Priority Areas

- Focus on developing growth opportunities in Food Systems, including agriculture, as a priority regional competitive strength.
- Leverage the work of Tourism Tasmania and Tourism Northern Tasmania to attract higher-value visitors, to increase off-peak demand and encourage regional dispersal of visitors.
- Work with UTAS, TasTAFE and other institutions to attract and retain more international and interstate students.
- Encourage businesses to collaborate to increase their global access, competitiveness and develop solutions to trade challenges.
2) Population growth

The region requires an increased skilled working-age population to supply our businesses with the resources they need for a growing economy.

Tasmania’s Population Growth Strategy seeks to increase the State’s population to 650,000 by 2050 to drive economic growth, create jobs and improve the standard of living for all Tasmanians.

Northern Tasmania’s current population is approximately 145,000 people. Based on current Tasmanian Government population projections based on a business as usual approach and without any policy interventions, the population is expected to reach 147,090 by 2042.

**By 2031 the Northern Tasmanian region will require approximately 10,000 additional workers to meet the needs of a growing economy.**

This includes an additional 5,000 workers to replace the loss of workers (as they move or age out of the workforce), and 5,000 additional workers required by expanding businesses and service sectors in a growing economy. See the graph below.

A Population Taskforce was established in 2018, chaired by the City of Launceston and including representatives of regional stakeholders, local government and State Government. The role of the Taskforce was to review the data available on the population challenge and identify interventions that could attract and retain more working age people to the region and identify a 2050 population target.

The Population Strategy 2019 is based on fulfilling the emerging workforce needs of our current and growing industry sectors. An aspirational population target of 200,000 by 2050 was set by the Taskforce.

![Northern Tasmania - Total Population Vs Working Population (Official Forecasts)](image)

Source: NIEIR 2018 (I)

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1 Key Directions Report 2018, by NIEIR
Priority Areas

Implement the Population Strategy developed by the Population Taskforce with a particular focus on increasing the working age population.

Attract a working age population to meet the skills and jobs required for Northern Tasmania.

Attract and retain more local, interstate and international students.

Develop a Welcoming Region Program to support and retain interstate and international migrants.

Plan for growth ensuring essential infrastructure and appropriate housing is available.

Population attraction

With an ageing population and the projected loss of 5,000 skilled workers as a result, the focus for population attraction is working age people with the right skills set to meet demand from industry. Based on the population target, the number of jobs in the region will increase from the current 66,892 to around 76,000 jobs in 2031.

An important part of attracting and retaining a working age population is understanding the employment opportunities now and into the future and promoting the job availability and skill requirements of emerging industries to potential resident workers. Workforce planning to define and publicise the jobs and career pathways for the future is also an important task for industry.

In the short to medium term the aim is to focus on health and community workers, and construction-related trades and skills as the State (and the region) experience growth in building and infrastructure projects. This growth occurs at a time when these skills are in high demand throughout other parts of Australia. Northern Tasmania will require a well-considered competitive pitch to attract these skilled people and their families to migrate to the region in the next one to five years.

The other growing job opportunities for the medium to longer term (in priority order) to 2031, are primarily in the services sectors, and have been identified as follows:

- Hospital, medical, aged-care and social services
- Education
- Food and beverage service (and retailing)
- Professional, scientific and technical services
- Public administration
- Food product manufacturing, and
- Personal services.

While these sectors don't necessarily all align with the main exporting industries the Plan seeks to promote, service sector jobs that support primary-based industries, population growth, an ageing population, tourism and skills development will all be essential.

Northern Tasmania has strong attributes including lifestyle, friendly people, stunning landscapes, heritage buildings, affordable living, clean air, easy commuting, a seasonal climate, and great food & wine. The opportunity is to clearly articulate the essence of the region as a key attractor for people to live, work, study, invest and do business in the region. Population Attraction is not just an advertising campaign but a combination of actions and programs that communicate a common message leading to interest and relocation to the region.

Supporting population growth

Increasing the population requires consideration of the planning and infrastructure required to accommodate and retain growth. The demand for housing, transport, water, sewerage, schools and training, hospitals and other services will need to be considered and planned as part of regional planning processes.

Investment in appropriate place-making infrastructure will assist in ensuring that the lifestyle factors attract people to the region, and also support them to stay in the region.

Northern Tasmania’s Regional Economic Development Plan
3) Innovation

Innovation is necessary to achieve a higher value economy with more, higher paying jobs.

Innovation allows products and services to move up the value chain, reducing pressure on natural assets and places, and adding to the number of well-paid jobs across the economy. It underpins investment, skills development and economic growth in adaptable and successful regions.

There is an appetite in the region to access and use more technology which needs to be fuelled to achieve regional potential.

Knowledge economy services which reflect employment in industries important for supporting innovation and specialisation are important drivers of productivity growth.

Business and industry must stay abreast of trends and new skills through education and training courses including shorter courses for up-skilling the current workforce (such as micro credentials), engaging with the innovation initiatives and other learning opportunities delivered by a variety of higher education providers.

University research can and should underpin regional innovation. It is important for business to engage proactively with UTAS, other institutions and industry bodies through research, education and skills. Commercialisation of innovative ideas, concepts or processes increases opportunities for exports and higher commercial returns. Initiatives such as the FermenTasmania food cluster, the Microwave Assisted Thermal Sterilisation (MATS) food technology in development, and the transition by more farmers utilising agri-tech in their operations, provide opportunities to leverage innovation in Food Systems which is one of the region’s priority sectors.

With the increasing prevalence of technology to improve quality and productivity, digital literacy and information technology skills will become increasingly important for businesses to remain competitive. Improving individual digital literacy will help businesses and community to better access available digital platforms.

Establishing an Innovation Framework and Hub in Northern Tasmania is a project presently under development as part of the Launceston City Deal ‘Smart Cities’ commitment led by the Office of the Coordinator General (OCG) in collaboration with the Australian Government, City of Launceston, Meander Valley Council, West Tamar Council, George Town Council, The University of Tasmania and Telstra.

‘Innovation and technology have an almost symbiotic relationship. Each can help to drive productivity growth by improving business processes and organisational effectiveness. Each can lead to new products and services, some of which will succeed and generate income growth, as well as benefit society. With strong technological infrastructure, (Northern Tasmania) will be better positioned to innovate in business, especially in tech-based sectors.’

Examples of Innovation in Northern Tasmania include:

- Macquarie House – a new home for start-up incubator Enterprize, and a physical space for design thinking and trialing disruptive ideas.

- UTAS Launceston Institute of Applied Science and Design - in development and to include a TestLab for Industry 4.0 Integrity of Food.

- Smart Cities Projects including: five 3D digital city models, people movement analytics, and an intelligent digital city roadmap.

- A Low-Power Wide-Area Network (LoRaWAN) in Launceston and some regional areas.

- Defence Innovation and Design Precinct is being planned for the Newnham Campus.

Priority Areas

- Build a regional innovation ecosystem (including a start-up ecosystem) to support businesses to access information, networks and processes to better apply innovation.

- Enhance the skills required to succeed in innovative, competitive and productive businesses, such as digital literacy, cyber security and Industry 4.0 applications in business.

- Leverage opportunities for innovation and productivity improvements from investments in enabling infrastructure, such as the NBN, the LoRa Network and the Launceston Institute of Applied Science and Design.
4) Investment

Investing for a growing and resilient economy.

To be globally competitive, Northern Tasmanian business must attract investment with creative thinking, quality design, strong brand, persistence and bold ambition.

The regional target is to increase public and private investment by an additional 40% by 2031 - this equates to an additional $500M per annum with approximately two thirds of this investment expected to come from and through the private sector.

An increase in business investment to unlock more productive capital and enable innovation is required to achieve the export and innovation targets.

Attracting a number of investments that are currently under consideration would have a significant positive impact on achieving ‘best case’ economic growth and would immediately underpin potential growth in Small to Medium Enterprises (SMEs). This investment could be public or private a new northern prison; abattoir facilities; an alternative renewable energy generation plant; and the co-location of a private hospital with the Launceston General Hospital.

A key issue raised by both start-up and expanding businesses is the challenge of gaining access to capital and operational finance, especially SMEs. Traditional banks are required by regulation to be conservative with commercial investments, especially for SME’s without equity or fixed assets to offer as collateral. However, more diverse funding mechanisms have evolved over the past few years that could present viable options for SME’s, such as micro-financing, crowd-funding finance, or peer-to-peer finance. An Investment Taskforce has been established to consider smaller projects that need funding alternatives to come to fruition.

Northern Tasmania Investment Taskforce

In 2018 NTDC established the Taskforce to provide quality advice and facilitate financing for projects and business expansions requiring alternative finance options. Its role is to develop and implement a workable plan to attract additional capital for private sector support with a particular focus on smaller projects and proponents that are not supported by current programs.

The Taskforce assists to facilitate, identify and shape investment opportunities, and assist to engage with investors to match the opportunity (including alternative markets, angel investment and equity crowd funding platforms).
Priority Areas

- Promote strategic incentives to attract more investment from existing and new businesses.
- Advocate at a regional level for investment in priority public infrastructure projects that enable economic growth.
- Continue to support the Investment Taskforce and consider how to fill the current investment gaps.
5) Infrastructure

Infrastructure plays a strong role in generating economic benefits for our region, while supporting environmental and social outcomes.

High quality infrastructure provides opportunities to attract investment and connect regional businesses to the rest of the State, nation and a growing global marketplace. This increases economic growth and productivity. Consideration must also be given to building resilience into the region’s infrastructure assets, including consideration of climate change adaption and natural disaster responsiveness.

Priority infrastructure that will enable the Northern Region to succeed and grow consistently over time includes:

- Placemaking Infrastructure - Amenities, facilities, service and culture - such as roads, parks, transport & freight infrastructure, quality health and education facilities, services and programs that make a region more attractive to people who want to stay for the long term.
- Information Communication Technology (ICT) Infrastructure - To achieve high rates of connectivity and foster innovative applications through physical and digital infrastructure so that industries and people can readily connect to technology and markets anywhere worldwide.

Placemaking Infrastructure

Prioritising placemaking outcomes in Northern Tasmania will enhance the lifestyle factors that support the attraction and retention of a growing and diverse population and underpin the region’s prosperity.

People remain in, and relocate to, regions that offer jobs, amenities, services, better lifestyle, strong cultural values, and a supportive community spirit. Place-making infrastructure such as quality hospitals, schools, roads, digital inter-connectors, cultural and recreational amenities, and future housing stock, all play an important role in building a community where people want to live. Accommodation and facilities for the growing visitor economy is also required.

Councils in Northern Tasmania are working with communities to develop, plan and implement initiatives which increase the region’s vibrancy, liveability and sustainability. In doing so they are reinforcing the region’s identity, reputation and its brand.

Regional planning will also need to consider the economic growth targets, a growing aging population,

‘Place matters for prosperity’

Place has always mattered for human prosperity. The direct influence of place on our material wellbeing is obvious, with physical attributes like climate, geology, topography and accessibility clearly affecting the material living standards of people who live there.

Place affects our prosperity indirectly as well. The activities, attitudes and character of the people who live in a place – rather than its physical attributes – make it attractive (or unattractive) for others to live there too....

People congregate in particular places because place matters for their prosperity. It matters directly and indirectly, materially and non-materially, and for better or worse.

Human beings flourish or languish in place.

and the resulting requirements for housing, providing adequate land for future businesses and high value industries, transport corridors and ensuring planned developments provide new facilities that support a growing population.

**ICT Infrastructure**

Northern Tasmania has a technological advantage – it is one of only a few regions in Australia that can fully participate in the growing worldwide gigabit economy due to the availability of NBN cable to the premise’s technology in many locations and the resulting high-speed internet services available to business and residents.

Northern Tasmania is also innovating in the LoRa devices and wireless radio frequency technology (LoRa Technology or long range, low power wireless platform). The LoRa platform has become the de facto technology for Internet of Things (IoT) networks worldwide. LoRa gateways and sensors have already been installed around Launceston and there is the opportunity for an open LoRa network to be established throughout Northern Tasmania. This would encourage more community, councils and businesses to utilise the Internet of Things technology and gain the productivity and new industry development opportunities that provides.

Work is also underway to have Launceston feature as a pilot site for 5G pilot programs and testing. The application of 3D modelling is also underway for planning processes within councils through the Greater Launceston Transformation project.

“**One of only a few regions in Australia that can fully participate in the growing worldwide gigabit economy.”**

**Priority Areas**

- Place-making and regional land use planning initiatives considers the ongoing provision of infrastructure and community amenities for current and future residents.
- Identify opportunities for Northern Tasmania to leverage the region’s ICT assets and capability.
- Maintain a pipeline of major private and public infrastructure projects to better assist with workforce planning and development.
- Advocate in the lead up to elections for Regional Priority Projects (and for LGA based projects where appropriate) to maximise the investment in the region.
6) Participation and productivity

Build and support the region’s human capital to improve workplace participation, productivity and responsiveness.

The aim is to ensure that the Region’s economic growth is inclusive and sustainable and that the benefits are widely shared and contribute to an improvement in quality of life. Productivity directly links to our education attainment, health outcomes, investment in technology, digital capacity and our ability to foster an innovative culture.

Increasing productivity will be reflected in higher paid (and higher skilled) jobs in current and future industries. A focus on strengthening human capital will be required to supply more higher paying higher skilled jobs. As a result, these jobs will also attract more talent, and ensure that businesses and institutions in the region are competitive, benefit from strong future-focused leadership and contribute to the wider economy.

Northern Tasmania has lower levels of education attainment compared to Tasmania and Australia as a whole.

A total of 46% of Northern Tasmanian residents hold no post school qualification compared to under 40% for the rest of Australia.

Northern Tasmanian stakeholders are particularly aware of the economic impact of poor educational attainment and health in our community. While this plan is not directly responsible for delivering health and education services within the region – regional stakeholders understand the importance of monitoring and advocating for programs to improve health and educational outcomes.

Northern Tasmania is different to other regions in one important aspect. The region has a strong community focus, and many new enterprises are motivated to achieve a social purpose. They are motivated to earn a living by ‘working with a purpose’ beyond just profit, to the benefit of the community and often while addressing social disadvantage.

Many of our enterprise leaders have a passion to make a difference to our community, they volunteer their

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**Health and productivity**

‘Employee health and wellbeing has its most obvious effect on organisational productivity through avoidable employee absence on sick or compensation leave. Less obvious, though still important, are productivity losses sustained where individuals attend work while ill or injured (sometimes referred to as presenteeism). Finally, poor employee health and wellbeing has an indirect effect on productivity through reduced employee engagement levels.’


It is important that the region’s people live a healthy life for longer to ensure they have the physical and mental health to participate effectively in our economy.

Health impacts on the ability to engage working age people to participate fully in the workforce. To support the vision to be the most liveable region in Australia, the community services and health industry will need to consider innovative programs to deliver high quality and contemporary services to address the needs of the community.

Key regional health and education indicators need to be monitored, so experts can advise appropriate solutions, and stakeholders can advocate for program changes to improve the economic productivity of the region.
“The region has a strong community focus.”

time and effort to achieve this outcome. This augers well for our ability to implement programs that are focused on up-skilling our unemployed or under-employed, and increasing the opportunities and prosperity for a broad cross-section of the community.

A main driver of the City Deal for Launceston is the University Transformation Project that relocates the university closer to the CBD, but more importantly it reinforces the need for economic transformation by significantly improving our education attainment and continuous learning. Education, skills and life-long learning then link to innovation and resilience to succeed in a fast-changing global environment.

Other areas of education focus for the region include:

- improving digital literacy to accommodate the ever-increasing role of technology in the workplace – using technology infrastructure and applications as tools for innovation;
- building responsiveness into the skills system to ensure that the region has right skills and well-equipped workforce that can respond to a changing business environment;
- improving the understanding of parents and children at school to complete Year 12 equivalent and/or an apprenticeship;
- develop new approaches or programs for youth not in employment, education or training (to increase the 25-34yr olds with advanced trade qualifications, diplomas and degrees); and
- developing education centres of excellence based on our regional strengths – for example a focus around food systems.

A stronger economy will provide more opportunity to work with successful businesses and our communities to support young and older people to transition into high-paying industries of the future.

Priority Areas

- Support programs to strengthen transitions to vocational training or higher education linked to the workforce, and deliver the skills and qualifications needed for a growing economy.
- Advocate for trials, opportunities and pathways, for disadvantaged cohorts.
- Seek opportunities to collaborate on relevant education and health programs to advance the regional economy.
Implementing the plan

A shared vision for the future of the region will be delivered through the collective efforts, sharing, support and trust between all stakeholders.

NTDC recognise that encouraging greater collaboration will improve the outcomes for the region. The focus must be to work collaboratively and efficiently across all levels of government, community stakeholders and the private sector to optimise the use of available resources to deliver benefits to the region.

Implementation is not going to be without its challenges, and for some, change is going to bring discomfort as we adjust to new ways of doing things. Throughout the development of this Plan, we need to keep looking forward, focusing on our goal and supporting each other to achieve our Vison. Collaboration is easy to do but hard to achieve and will require strong leadership within region.

The extension of the City Deal for Launceston beyond 2022, provides an opportunity to engage three levels of government to gain support and coordination to assist in elements of the implementation of this plan.

The Implementation Plan will consider efforts required over the upcoming three-year period and will be updated annually. The next steps to develop the Implementation Plan is to meet with the State Government and major stakeholders such as UTas, Launceston Chamber of Commerce, and each Council, to work on how the Priority Areas for action can be achieved over a three year period by fine-tuning current programs and resourcing new programs.

Negotiating the measures and appropriate targets will be also an important point for discussion. NTDC acknowledges that with limited resources, we need to work in collaboration with all stakeholders to achieve the economic prosperity the region seeks.

The appendix includes the current measures that will be used by the City Deal Board to consider how the region is progressing and the outcomes of the REDP. NTDC will also work other stakeholders and State Government on what additional measures will be required to monitor the Implementation Plan, and other areas of importance such as innovation and overall improvements in health and wellbeing.

Work has also commenced on how to formalise a regional process to encourage greater collaboration and unity with our stakeholders and gain an increased level of effectiveness in the coordination and communication between all parties.

Priority Areas

- Workshop with various State Government Departments the key strategies and how to refine State programs to meet the needs of Northern Tasmania.
- Agree to measures that can be monitored over time.
- Develop a Regional Collaboration Model that allows all regional stakeholders to be networked into the implementation and communications of the REDP.
- Maximise the City Deal Agreement to achieve REDP outcomes.
The Metrics for Northern Tasmania are a commitment of the Launceston City Deal and have been developed to measure economic and education outcomes for the Northern Tasmania region and to monitor the success in implementing the Regional Economic Development Strategy.

The Northern Tasmania region includes the local government areas of Break O’Day, Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar.

The metrics are provided in three parts:

- **People**—selected characteristics of the region's residents
- **Participation**—the region's participation in education and employment
- **Productivity**—how productive the region is and its contribution to the economy.

The metrics were developed in consultation with a working group with members from local councils, Northern Tasmania Development Corporation, Launceston Chamber of Commerce, Regional Development Australia (Tasmania), University of Tasmania and the Department of State Growth. The Tasmanian Treasury and Department of Premier and Cabinet were also consulted in their development.

### People

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Population</strong></td>
<td>The total population of the region based on place of usual residence.</td>
<td>Australian Bureau of Statistics (ABS)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T03 Age by Sex, Count of Persons</td>
</tr>
<tr>
<td><strong>Age profile</strong></td>
<td>The age profile of the region is based on place of usual residence. Understanding the age profile of the region helps to predict service demand such as health and education and also to understand the working age population.</td>
<td>ABS 2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T03 Age by Sex, Count of Persons</td>
</tr>
<tr>
<td><strong>Domestic and international migration</strong></td>
<td>A person’s place of usual residence five years before the Census providing an indication of the stability of the population and the amount of domestic and international migration.</td>
<td>Table builder 2006 &amp; 2011 Census, Counting Persons, Place of Usual Residence, UAISP Usual Address Five Years Ago Indicator by Statistical Division (SD), General Community Profile, Catalogue 2001.0, G42 Place of Usual Residence 5 Years Ago by Sex, Count of persons aged 5 years and over</td>
</tr>
</tbody>
</table>
## Participation

### Education

<table>
<thead>
<tr>
<th><strong>Year 12 completion rates</strong></th>
<th>The number of Year 12 students and the proportion of students who achieved a Tasmanian Certificate of Education (TCE) and an Australian Tertiary Admission Rank (ATAR).</th>
<th>Office of Tasmanian Assessment, Standards and Certification (TASC), Attainment Profile for schools in Northern Tasmania Region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vocational Education and Training (VET)</strong></td>
<td>VET enrolments and completions</td>
<td>National Centre for Vocational Education Research [<a href="https://www.ncver.edu.au/">https://www.ncver.edu.au/</a>] as compiled by Skills Tasmania</td>
</tr>
<tr>
<td><strong>University of Tasmania</strong></td>
<td>UTAS enrolments and completions at its Northern Tasmania campuses</td>
<td>University of Tasmania as compiled by the Business Intelligence and Institutional Performance Division [<a href="mailto:bi.info@utas.edu.au">bi.info@utas.edu.au</a>]</td>
</tr>
<tr>
<td><strong>International students</strong></td>
<td>The number of international students studying at Secondary schools, colleges and University</td>
<td>Registrar and Admissions Officer, Launceston Church Grammar School, Scotch Oakburn College. Government Education and Training International, Tasmanian Government Department of Education Policy, Strategy and Performance Unit. Business Intelligence and Institutional Performance Division, University of Tasmania.</td>
</tr>
<tr>
<td><strong>Highest qualification</strong></td>
<td>The highest qualifications of persons over 15 years of age in the region</td>
<td>ABS 2016 Census of Population and Housing, Launceston and North East (602), Catalogue 2003.0, T31 Non-School Qualification: Level of Education by Age by Sex, Count of persons aged 15 years and over with a qualification(a)</td>
</tr>
</tbody>
</table>

### Employment

<table>
<thead>
<tr>
<th><strong>Labour force status</strong></th>
<th>The labour force characteristics of the region.</th>
<th>ABS 2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T33 Labour Force Status by Age By Sex, Count of persons aged 15 years and over</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unemployment rate</strong></td>
<td>The number of unemployed persons as a percentage of the labour force being employed and unemployed persons who are actively looking for work.</td>
<td>Derived from the ABS 2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T33 Labour Force Status by Age By Sex, Count of persons aged 15 years and over</td>
</tr>
<tr>
<td><strong>Youth unemployment rate</strong></td>
<td>The number of unemployed persons aged between 15 and 24 years as a percentage of the labour force being employed and unemployed persons who are actively looking for work.</td>
<td>Derived from the ABS 2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T33 Labour Force Status by Age By Sex, Count of persons aged 15 years and over</td>
</tr>
</tbody>
</table>
### Participation rate
The percentage of the total working age population (persons aged between 15 and 64 years) that are part of the labour force (employed and unemployed persons who are actively looking for work).

Derived from the ABS 2016 Census of Population and Housing, Launceston and North East (602) Time Series Profile, Catalogue Number 2003.0, T33 Labour Force Status by Age by Sex, Count of persons aged 15 years and over.

### Employment by industry
The number of persons employed within different industries.

ABS 2016 Census of Population and Housing, Launceston and North East (602), Catalogue 2003.0, T34 Industry of Employment(A) by Sex, Count of persons aged 15 years and over.

### Productivity

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Businesses</strong></td>
<td>The number of actively trading businesses as at 30 June in each year indicated.</td>
<td>ABS, 8165.0 Counts of Australian Businesses, including Entries and Exits, June 2013 to June 2017; Released at 11.30 am (Canberra time) 20 February 2018; Businesses by Local Government Area by Industry Division by Employment Size Ranges, June 2017.</td>
</tr>
<tr>
<td><strong>Businesses by Industry</strong></td>
<td>The number of actively trading businesses as at 30 June in each year indicated by industry</td>
<td>ABS, 8165.0 Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017; Released at 11.30 am (Canberra time) 20 February 2018; Businesses by Local Government Area by Industry Division by Employment Size Ranges, June 2017.</td>
</tr>
<tr>
<td><strong>Median annual income</strong></td>
<td>The median income of the community provides an indication of how economic growth is translating to person income.</td>
<td>ABS, 6524.055002 Estimates of Personal Income for Small Areas, 2011-16, Table 2 Estimates of Personal Income, Employee Income, 2011-16, Statistical Area Level 4.</td>
</tr>
<tr>
<td><strong>Innovation</strong></td>
<td>Under investigation</td>
<td></td>
</tr>
</tbody>
</table>

### A note on data sources
Data has been sourced based on the Australian Bureau of Statistics SA4 Launceston and North East Tasmania which corresponds with the Northern Tasmania region.

The source of data for each metric has been referenced in addition to the potential limitations of each data set.

Data has been accessed from a variety of sources including the Australian Bureau of Statistics, Government data sets and regional economic models. The data provided is the best available at the time of compiling the metrics however due to the methodology used to derive the metrics, particularly those that require regional data to be modelled, such as Gross Regional Product, have recognised limitations and their accuracy cannot be relied upon.

The metrics relating to innovation are incomplete at this time. The Commonwealth government is leading a review of innovation metrics through the Innovation Metrics Review Taskforce. A final report on the review, including a framework for the measurement of innovation in Australia is expected in 2019. The metrics will be updated once this review is complete.