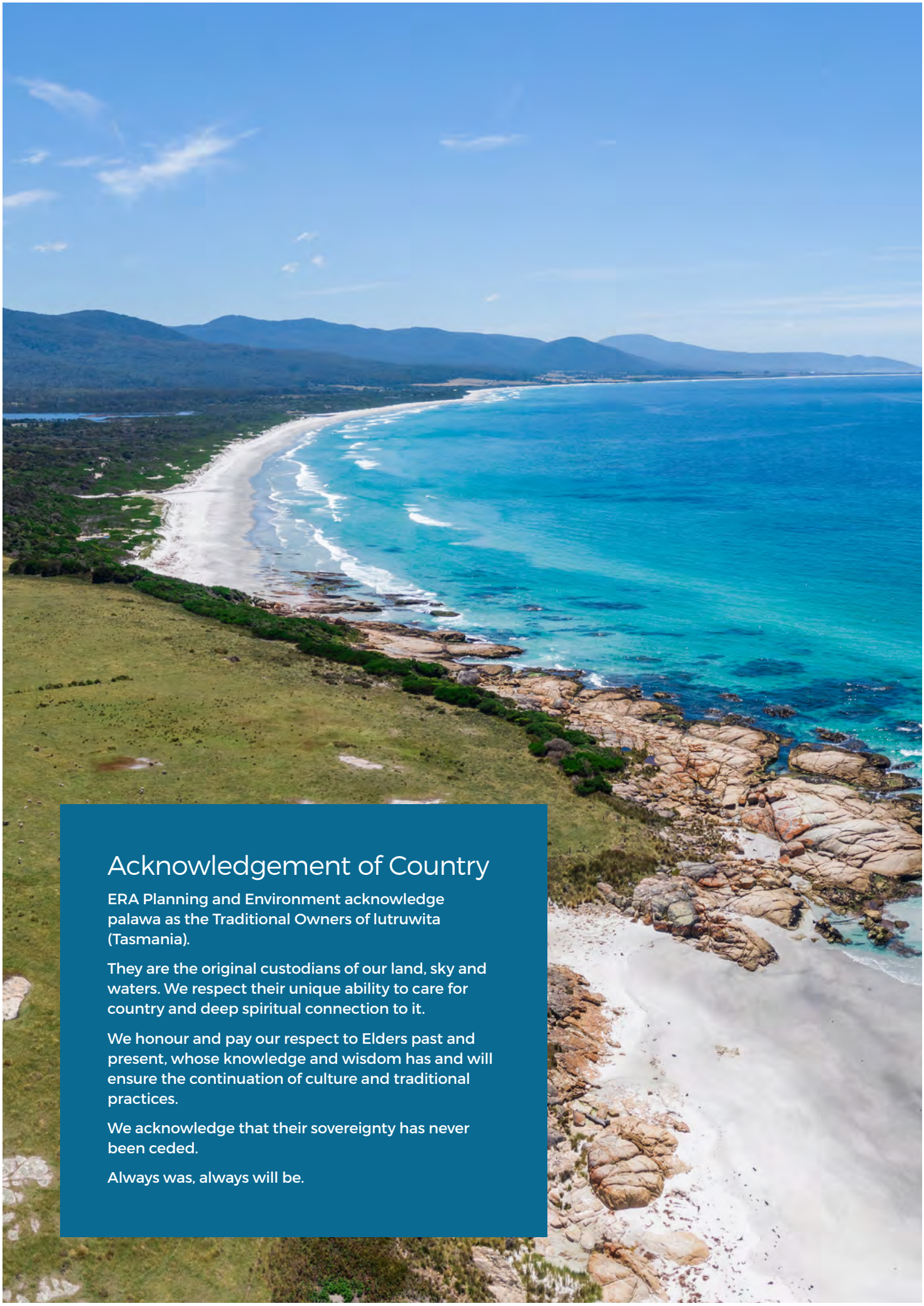
GLAMORGAN SPRING BAY COUNCIL

era PLANNING & ENVIRONMENT

Glamorgan Spring Bay structure plans review

State of Play report

Draft for community engagement | 10 November 2023



Acknowledgement of Country

ERA Planning and Environment acknowledge palawa as the Traditional Owners of lutruwita (Tasmania).

They are the original custodians of our land, sky and waters. We respect their unique ability to care for country and deep spiritual connection to it.

We honour and pay our respect to Elders past and present, whose knowledge and wisdom has and will ensure the continuation of culture and traditional practices.

We acknowledge that their sovereignty has never been ceded.

Always was, always will be.

How to get involved

The project team is looking forward to receiving feedback from the community on the State of Play report, but also on what they value and appreciate about living in Glamorgan Spring Bay. There are lots of ways you can become involved.

The project team will be undertaking community engagement from 13 November until 4 December 2023. To participate you can attend a 'Drop-in Session' and have an informal chat with us at one of five locations around the municipal area.

Where	When	Time
Triabunna Village, 20 Melbourne Street	Thursday November 23rd	4.00pm to 6.00pm
Orford IGA, 3 Charles Street	Friday November 24th	9.30am to 11.30am
Swansea IGA Express, 8 Franklin Street	Saturday November 25th	9.30am to 11.30am
Bicheno IGA Express, 39 Foster Street	Saturday November 25t	1.30pm to 3.00pm
Coles Bay Community Hall, 60 Harold Street	Sunday November 26th	10am to 12.00 noon

We also have an online survey which you can access via the below link *https://qk3eatkr196.typeform.com/to/fKDhrIDW* or by scanning the QR code with your phone's camera to provide your ideas and suggestions. The survey is anonymous and should only take approximately 5-10 minutes.

If you'd like to speak with one of the project team directly you can contact us on (03) 6165 0443 or email us at engagement@eraplanning.com.au

We look forward to hearing from you about this exciting project for the future of the townships in Glamorgan Spring Bay!

Glossary

Term	Meaning
ABS	Australian Bureau of Statistics
Council	Glamorgan Spring Bay Council
ERA	ERA Planning and Environment
ERP	Estimated Residential Population
GSBC	Glamorgan Spring Bay Council
IGA	Independent Grocers of Australia
LGA	Local Government Area
LPS	Local Provisions Schedule
LUPAA	Land Use Planning and Approvals Act 1993
QR	Quick Response
RMPS	Resource Management and Planning System
SAL	Suburbs and Localities
SEIFA	Socio-Economic Indexes for Areas
SS	State Suburbs
STRLUS	Southern Tasmania Regional Land Use Strategy
TPS	Tasmanian Planning Scheme – Glamorgan Spring Bay
UCL	Urban Centres and Localities

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1 Introduction

1.1 About the project

Glamorgan Spring Bay Council has engaged ERA Planning and Environment to review existing structure plans for Bicheno, Coles Bay, Swansea, and Orford/Triabunna, and prepare updated plans that respond to the changing nature of the area.

The structure plans will consider population trends, community needs, local planning context, economic drivers, development trends, and land use demand and supply. The structure plans also support the upcoming review of the Southern Tasmania Regional Land Use Strategy that provides regional level direction for zoning and settlement strategies for towns across the southern region.

The population of Glamorgan Spring Bay has increased beyond predicted growth forecasts over the period from 2018 to 2023. This growth was a trend seen across the state of Tasmania. Structure plans for the areas of Coles Bay, Bicheno, Swansea, and Triabunna/Orford were prepared in 2014 to 2016 providing direction for the next ten years. These strategic documents now require revision to ensure they respond to the future of the area, including the changes in residential settlement and tourism demand.

When the existing structure plans were published, the municipal area was expected to lose around 7% of the population by 2042 and is now expected to increase by 11%. This means the strategic goals of the Council need to be reviewed to ensure that the needs of the community are met into the changing future.

Not only is the population growing, but its structure is also changing. With an ongoing increase in average age, and decrease in residents per household, the types of housing and services provided will need to respond to support a thriving community.

Physical infrastructure is critical to facilitating the supply of developable land. Currently, there are capacity issues associated with stormwater generally, and budgetary constraints for hydraulic infrastructure.

At the same time the importance of the area to the visitor economy in Tasmania and its popularity as a holiday home location has increased. During the summer period there are noticeable seasonal population pressures being experienced in the Glamorgan Spring Bay area with some town services struggling to meet demand.

The study area context is shown in Figure 1, with additional maps providing spatial guidance in the appendices. The study areas are shown in Appendix A to Appendix D.

1.2 What is a structure plan?

A structure plan is a strategic document used by the local government to guide the future use and development of the local area. It provides a blueprint for future land use and development changes in an area and can be used to guide the application of the planning scheme through zoning, overlays, and specific provisions.

Structure plans also provide local government with a more tangible framework to implement the priorities identified for settlements at the regional land use strategy level. The scope of a structure plan can include urban design outcomes specific to the area, supporting the desired future character. A structure plan needs to be based on robust data and assumptions in order to realistically set goals for the future. Whilst we cannot predict the future, we can prepare to respond to the changes that may come.

1.3 Purpose of this report

This State of Play report provides a snapshot of the current state of the towns, their character, strengths, and challenges, and includes an early analysis of future trends to inform the direction for community engagement and the key focus areas for the structure plans. The structure of the report is shown in Figure 1.

This report is intended to be used as a draft to facilitate community engagement. Over the engagement period this report will be used as a reference to guide discussion on the most relevant issues for Glamorgan Spring Bay. This document will be updated following the engagement process to best reflect the existing and future character of the area.

This report provides an overview of the context in which the structure plans will be developed. This includes:

- A review of the existing strategic documentation for the area. This will seek to understand the existing and historic issue facing the area, and consideration of how ongoing issues can be addressed.
- Consideration of current and predicted trends in residential and transient populations and their demographics, tourism demand, and temporary worker and visitor accommodation. What will the community look like in ten years and how will this change seasonally?
- The existing and potential future capacity of developable land, utilities, and community infrastructure. Based on the predicted and desired future community, can the area provide sufficient, housing, sustainable utilities, and effective health and well-being support?
- Desired future character of individual towns and the municipal area. What does the community want their town to look like over the next ten years?
- Current and future consideration of natural values and hazards. What challenges will the area face with changing climate and what values need to be protected?

Figure 1 Report structure

Figure 2 Context map

2 Context

2.1 Previous studies

Table 1 provides a list of the strategic documents that have been reviewed for this project. The analysis in this report relies on the information provided in the documents listed below and population data provided by REMPLAN and the ABS.

Table 1 Reviewed strategic documents

Year	Title	Lead author	Document type
2014	Bicheno Structure Plan	Urbis	Consultant report
2014	Triabunna Orford Structure Plan	Urbis	Consultant report
2016	Coles Bay Structure Plan	Aurecon	Consultant report
2016	Swansea Structure Plan	Aurecon	Consultant report
2020	Submissions and Section 35F Report – Response to Representations to the Glamorgan Spring Bay Draft Local Provisions Schedule	Glamorgan Spring Bay Council	Planning authority report
2020	Glamorgan Spring Bay Council's 10-year Strategic Plan 2020-2029	Glamorgan Spring Bay Council	Planning authority report
2020	Southern Tasmania Regional Land Use Strategy 2010-2035	Southern Tasmania Councils Authority	Policy document
2022/2023	Residential land use supply and demand analysis	State Planning Office	Population data
2022	Regional Planning Framework Discussion Paper	State Planning Office	Government discussion paper

2.2 Planning system

2.2.1 Policy framework

Land use and development in Tasmania is undertaken within the framework of the Resource Management and Planning System (RMPS). The RMPS is comprised of a suite of legislation, supported by a network of planning schemes, policies, and strategies. The RMPS provides a legislative framework for decision making to ensure the sustainable use and development of Tasmania's natural and physical resources. The core planning legislation in the RMPS is the *Land Use Planning and Approvals Act 1993* (LUPAA).

Other key pieces of legislation include the *Environmental Management and Pollution Control Act 1994*, the *State Policies and Projects Act 1993*, the *Resource Management and Planning Appeal Tribunal Act 1993*, the *Tasmanian Planning Commission Act 1993,* and the *Historic Cultural Heritage Act 1995*.

In addition to providing for relevant assessment and permitting process relating to different types of projects, the RMPS also creates a hierarchy of policy and strategic documents against which strategic land use decisions are made as shown in . This includes planning scheme amendment requests and major projects.

It is important to remember that the planning scheme is both part of the policy hierarchy – as it expresses the policy intent of the State through the State Planning Provisions -and a tool which provides various mechanisms to implement desired strategic planning outcomes at the local level.

2.2.2 Tasmanian Planning Scheme

The Tasmanian Planning Scheme – Glamorgan Spring Bay came into effect on 30 March 2022. This planning scheme comprises the State Planning Provisions (SPPs) and Local Provisions Schedules (one for each municipal area). The SPPs provide consistency on use and development standards across the state. The Local Provisions Schedule provides the zoning, overlays, and planning rules specific to the Glamorgan Spring Bay area.

The zoning of land within the municipal area informs the potential supply of future residential land and the overlays guide development on land subject to considerations such as bushfire, inundation, and natural assets. The overlays provide a good indication of how constrained land is for future development purposes.

The four existing structure plans were initiated and finalised during the transition from individual local government planning schemes to a combined state-wide planning scheme. These documents included commentary on guiding land use and development and rezoning to align with the interim planning schemes. The interim planning schemes were based on regional model provisions developed through the Southern Tasmanian Regional Planning Project around 2011 and 2012.

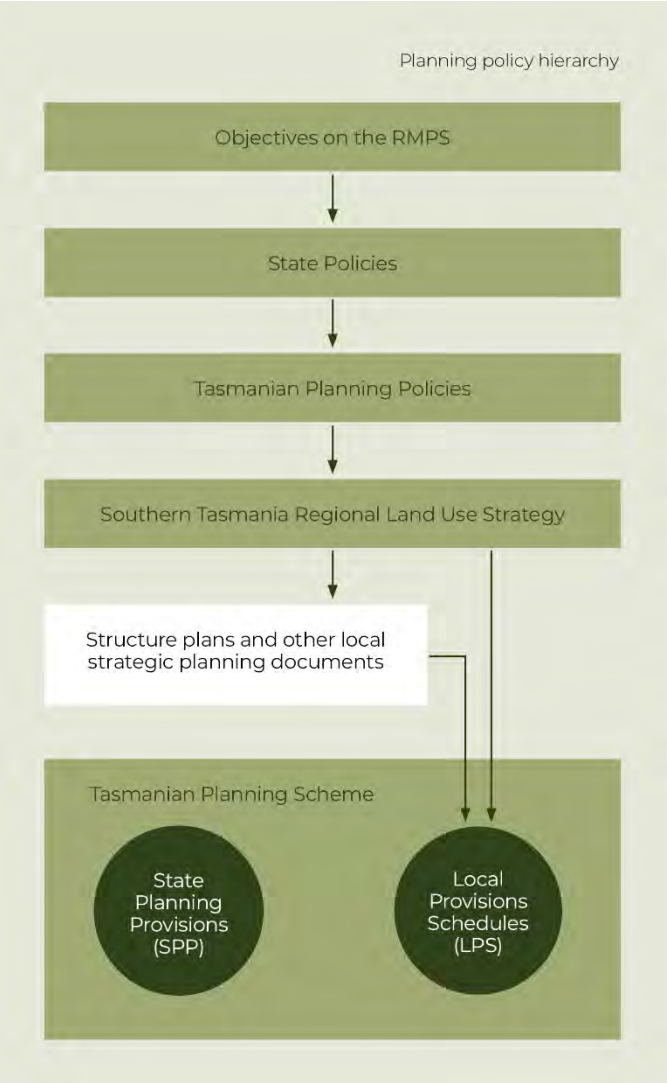


Figure 3 Planning policy hierarchy as applied to Glamorgan Spring Bay

We have now transitioned to the Tasmanian Planning Scheme almost statewide, with the Tasmanian Planning Scheme – Glamorgan Spring Bay Local Provisions Schedule now in force. Therefore, this review process is likely to limit zoning changes to specific areas of importance rather than municipal wide updates.

The following zones are currently used in Glamorgan Spring Bay under the Tasmanian Planning Scheme.

- General Residential
- Future Urban
- Low Density Residential
- Rural living
- Local Business
- Light Industrial
- Rural
- Agriculture
- Landscape Conservation
- Utilities
- Community Purpose
- Recreation
- Open Space
- Particular Purpose

Refer to the appendices for zoning and overlays of each settlement area.

The zoning of land in study areas will be reviewed as part of the next stage of the structure planning process. This will be key to determine the supply and demand particularly of the residential, commercial, and industrial zones, and whether there is the potential for rezonings or back-zonings to ensure an appropriate supply is provided to facilitate and stimulate growth.

Additionally, feedback received during the LPS public exhibition process in the form of representations will also be considered in the development of the structure plans.

2.3 Parallel work

TasWater have undertaken master planning for the east coast and prepared an internal report addressing the region's connections, population, and land supply. This work will be considered in the development of the structure plans.

The Tasmanian government is undertaking a review of the regional planning framework and draft structure plan guidelines. It is intended that the improvements to the regional land use planning framework will support the future review of the regional land use strategies for the state.

Currently, the RMPS in Tasmania includes three State Planning Policies providing policy direction on sustainable development in relation to water quality, agricultural land, and the coastal environment. The Tasmanian government is also progressing the establishment of the Tasmanian Planning Policies (TPPs). The TPPs will provide high-level strategic policy directions to be delivered through the Regional Land Use Strategies. The TPPs are currently under independent review by the Tasmanian Planning Commission, prior to finalisation.

REMPLAN are currently undertaking research into residential supply and demand within Tasmania. The data generated through these studies will help inform the future regional land use strategies for Tasmania. Population forecasts for the Glamorgan Spring Bay municipal area have been prepared by REMPLAN and used in the population profile in this report.

2.4 Statistical analysis

The population and demographic data used in this report has been obtained from the Australian Bureau of Statistics (ABS) and REMPLAN Community. REMPLAN has also prepared population forecasting data for the Glamorgan Spring Bay municipal area.

The population predictions for Glamorgan Spring Bay are based on estimated residential population (ERP) from the ABS. The statistics commence in 2021 and predict population, births, deaths, migration, and dwellings each year to 2046. Using the ERP as the basis for the projections means that there is some discrepancy between the starting population and the population for the projections recorded in the census. This limits the ability to compare the current and future population. There is no single agreed methodology to calculate predicted population growth. The Department of Treasury and Finance population projections demonstrate the difference in methodology when compared to the REMPLAN predictions.

The differences in populations records and projections across the study area is demonstrated Table 2 below.

Table 2 Comparison of population data by source

Locality	REMPLAN 2021 ERP	ABS 2021 Census	REMPLAN 2035 projection	2035 applying REMPLAN growth rate to Census 2021 population
Glamorgan Spring Bay	5118	5012	5756	5631
Dwellings	5044	4722	6068	
Bicheno	913	1049	1111	1272
Dwellings	702	983	914	
Coles Bay	N/A	515	N/A	
Dwellings	N/A	658	N/A	
Swansea	812	997	948	1161
Dwellings	801	705	987	
Orford	639	685	727	778
Dwellings	997	965	1146	
Triabunna	738	905	726	890
Dwellings	409	565	431	

The ability to assess population change over time is further complicated by the change in statistical areas used by the ABS between census dates. The ABS uses different categories of geographical area to determine population at a local, regional, state and country level, known as 'geography types'. There are multiple geography areas at the local level, including 'Suburbs and Localities', 'Urban Centres and Localities', 'State Suburbs', and the defined areas of these have changed over time, as shown in Table 3 For example, in 2006 and 2011 the towns of Triabunna and Orford were both part of a 'locality' known as Spring Beach; the defined area of Spring Beach also changed between 2006 and 2011. Orford and Triabunna became individual 'localities' in 2016; the same area was used in 2021. Another example of this issue is demonstrated through the statistical areas defined for Bicheno:

- 2001 Urban Centres and Localities
- 2006 Urban Centres and Localities - Area consistent in 2001

  State Suburbs - Same defined area as Urban Centres and Localities
- 2011 Urban Centres and Localities - Defined area was altered from 2006

  State Suburb - Defined area different to both 2006 State Suburbs, and 2006 and 2011 Urban Centres and Localities
- 2016 Urban Centres and Localities - Area consistent in 2011

  State Suburbs - Defined area different area to all previous categories
- 2021 Urban Centres and Localities - Area consistent in 2011 and 2016

  Suburbs and Localities - Same area as 2016 State Suburbs

This means that it is reasonable to compare data for Bicheno using:

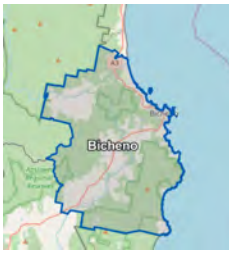
- Urban Centres and Localities across 2011 and 2016; and
- Suburbs and Localities 2021 and State Suburbs 2016.

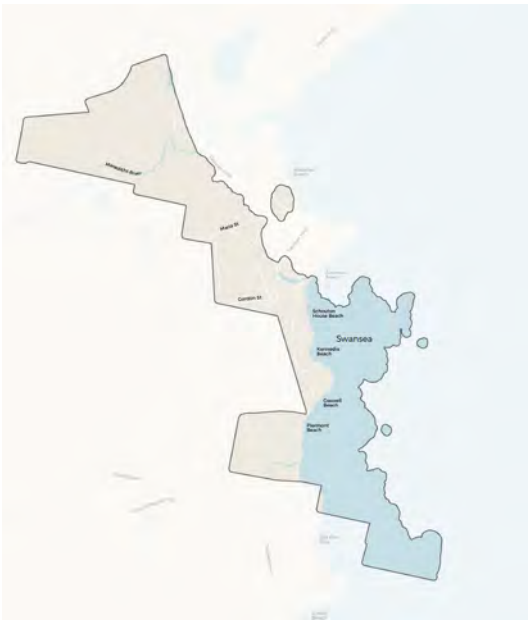
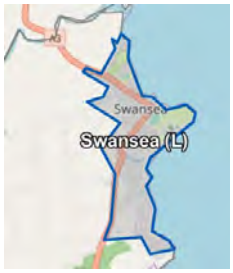
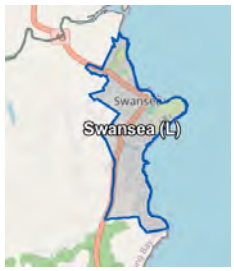
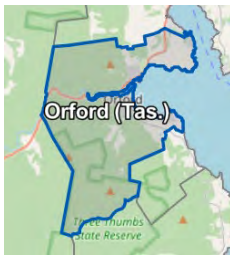
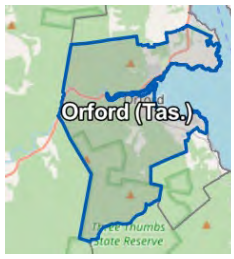
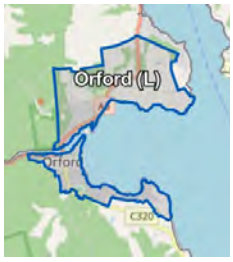
Suburbs and Localities (SAL) is a new geography type created in 2021 for the period 2021 to 2026. The Suburbs and Localities geography type has been used in the REMPLAN Community statistics for Coles Bay, Swansea, Orford, and Triabunna.

Glamorgan Spring Bay is identified as both a 'Local Government Area' and a 'Statistical Local Area'. The geographic area used for these geography types is the same for Glamorgan Spring Bay.

The ABS census data collected in 2021 has been used as the basis for the current population profile statistics in this report, at the Statistical Local Area level. Population forecast data used in this report is based on the REMPLAN projections, with comparison made to the Department of Treasury and Finance projections, and data obtained by applying the rate of growth from the REMPLAN projections to the recorded census population data from 2021. Maps showing changes in geographical areas for ABS geographical types can be seen in the table below:

Table 3 Changes in geographical areas for ABS geographical types

Study Area	2011	2016	2021
Bicheno			
	 SS	 SS	 SAL
	 UCL	 UCL	 UCL
Coles Bay			
	 SS	 SS	 SS

Study Area	2011	2016	2021
Swansea			
	 SS	 SS	 SAL
	 UCL	 UCL	 UCL
Orford			
	 SS	 SS	 SAL
	 UCL	 UCL	 UCL

Study Area	2011	2016	2021
Triabunna			
	 SS	 SS	 SAL
	 UCL	 UCL	 UCL

3 Glamorgan Spring Bay now

3.1 Population profile

The population of Glamorgan Spring Bay is currently estimated at 5,242 people, with a total of 4,342 (83%)[1] residing in the study area localities (REMPLAN 2023). Population by locality provides a breakdown of the population across each structure plan area:

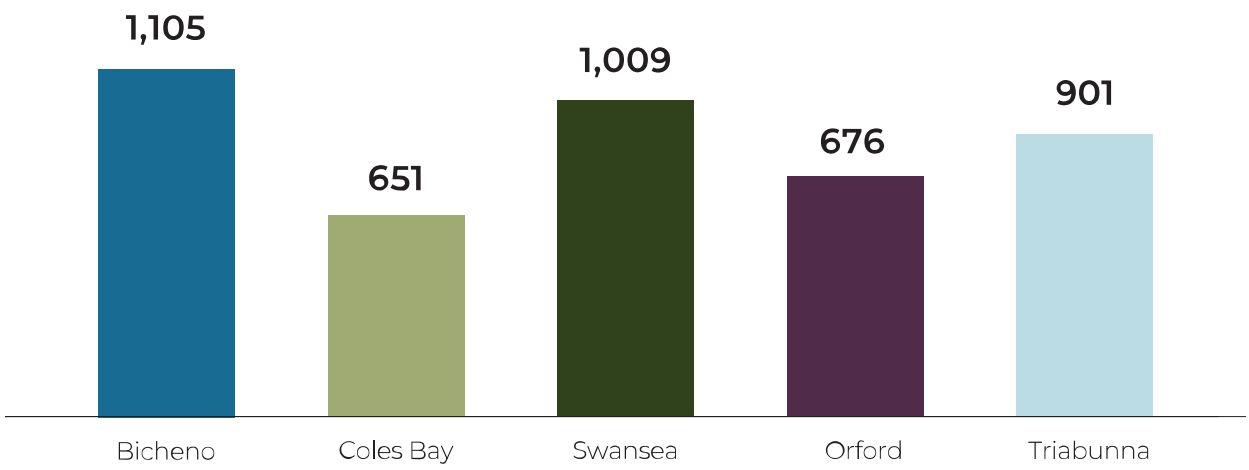


Figure 4 Population breakdown by locality

Table 4 Population growth from 2011 to 2021 in Glamorgan Spring Bay

ABS Census population	2011	2016	2021	% change* 2011-2016	% change 2016-2021	% change* 2011-2021
Locality						
Bicheno	853	957	1,076	12.19%	12.43%	26.14%
Coles Bay	305	355	515	16.39%	45.07%	68.85%
Swansea	771	872	997	13.10%	14.33%	29.31%
Orford	518	586	685	13.13%	16.89%	32.24%
Triabunna	895	911	905	1.79%	-0.66%	1.12%
Glamorgan Spring Bay	4,191	4,400	5,012	4.98%	13.91%	19.59%

*The statistical area boundaries changed between 2011 and 2016. Therefore, the increase is an estimate as the defined population changed.

[1] All population statistics use ABS data, with population forecast data provided by REMPLAN.

The population of Glamorgan Spring Bay grew by nearly 20% from 2011 to 2021 (Table 4). There was a significant increase in population between 2016 and 2021 across the municipal area, but the most dramatic increase was seen in Coles Bay where the population nearly doubled. The total population for the area is based on estimated residential population and census counts. Glamorgan Spring Bay has a high rate of seasonal or intermittent residents who own a second home used as a holiday home. This is reflected in the census counts where around half the dwellings are unoccupied on census night. The census occurs in August, when a significant proportion of the homeowners would not normally be staying in the area. The population count can impact the provision of services provided to the towns.

Generally, Glamorgan Spring Bay has an older population with a median age of 57, compared to 39 for Greater Hobart (ABS 2021). The majority of households are couples without children. The increased median age also means there are more retired or semi-retired residents living in the area. This trend impacts the statistics on income for the area.

Around 47% of the over 15 population of Glamorgan Spring Bay are currently in the workforce (ABS 2021). There is less than 5% unemployment in the working population and the majority of those working are employed within the municipal area. This means that there is less travel required for work.

Journey to work data from the ABS (Census 2021) shows that 86% of workers travel to work within the municipal area, followed by:

- Break O'Day – 2.93%
- Hobart – 2.06%
- Clarence – 1.79%
- Sorell - 1.75%
- Glenorchy – 1.14%; and
- Southern Midlands – 1.03%

The median income of $52,260 per annum is substantially lower than the Tasmanian median of $70,616 (ABS 2021). However, given the higher median age of the population it is likely that this is impacted by the lower number of people of working age in the community. Around 47% of the population currently participate in the workforce compared to 58% across Tasmania. This means that there is 11% fewer people earning an income that contributes to the overall median income.

Currently, in Glamorgan Spring Bay, 19% of mortgages exceed 30% of household income. Housing is considered affordable when it costs less than 30% of household income. Out of 520 areas in Australia, 441 (85%) are considered more affordable than Glamorgan Spring Bay. The SEIFA index of disadvantage score for Glamorgan-Spring Bay is 950, meaning that the municipal area is more disadvantaged than 70% of Australian LGAs (refer to Figure 5). The median mortgage repayment in Glamorgan Spring Bay represents 25% of the median income, compared to 22% for Greater Hobart. Around 53% of mortgage payment fall within the rage of $600 to $1599 per month. Around 60%of people have an income between $300 to $1,249 per week.

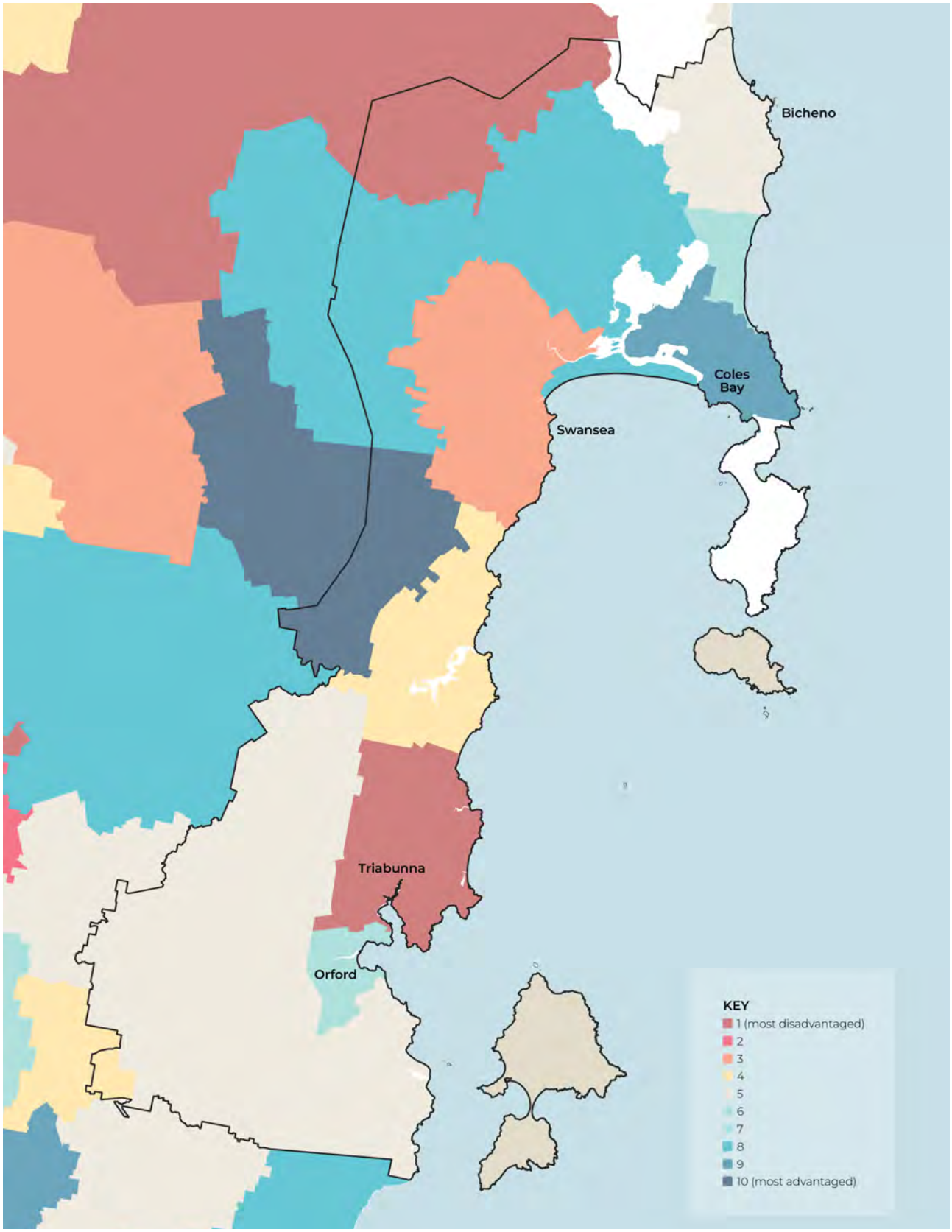


Figure 5 SEIFA map for Glamorgan Spring Bay

The 2021 ABS census found at least[2] 38% of Glamorgan Spring Bay has one or more long-term health conditions including:

- arthritis
- asthma
- cancer (including remission)
- dementia (including Alzheimer's)
- diabetes (excluding gestational diabetes)
- heart disease (including heart attack or angina)
- kidney disease
- lung condition (including COPD or emphysema)
- mental health condition (including depression or anxiety)
- stroke.

This means that ongoing provision of health and social services will be critical in the area.

A summary of key statistics relevant to the community is shown in Table 5.

Table 5 Summary of key census statistics for Glamorgan Spring Bay (Australian Bureau of Statistics, 2011, 2016 & 2021)

	Glamorgan Spring Bay			Greater Hobart[3]	Tasmania
	2011	2016	2021	2021	2021
Population					
Total	4,190	4,400	5,012	247,086	557,569
Female	2,071	2,159	2,436	126,562	283,804
Male	2,119	2,238	2,578	120,521	273,765
Median age					
Median age	53	56	57	39	42
Age profile					
0-4	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	6.4%	5.9%	5.9%	11.4%	11%
25-54	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	25.9%	29.5%	34.2%	18.8%	20.9%

[2] Of respondents to the 2021 ABS census, 9.3% did not state whether or not they had one or more long term health conditions.
[3] ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.

	Glamorgan Spring Bay			Greater Hobart[3]	Tasmania
	2011	2016	2021	2021	2021
Employment[4]					
Worked full time	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	7.1%	5.3%	4.8%	6.2%	5.9%
Income					
Median weekly household income	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$160	$190	$250	$350	$290
Family structure					
Couple family without children	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	10.4%	12.0%	11.0%	18.0%	17.3%
Other	0.5%	0.6%	0.9%	1.6%	1.4%
Household type					
Family household	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	2.8%	3.2%	2.4%	4.2%	3.4%
Household size					
Average person per household	2.1	2	2.1	2.4	2.4
Car ownership					
Av motor vehicles per dwelling	1.9	1.9	2	1.9	1.9

[4] Percentage of the active labour force, not the entire population.

3.2 Population projections

The population of Glamorgan Spring Bay is projected to increase from 5242 persons in 2023 to 6079 persons in 2046 (REMPLAN 2023). This is an overall rate of growth of 0.69%. The rate of growth differs between the towns, with Triabunna projected to decline:

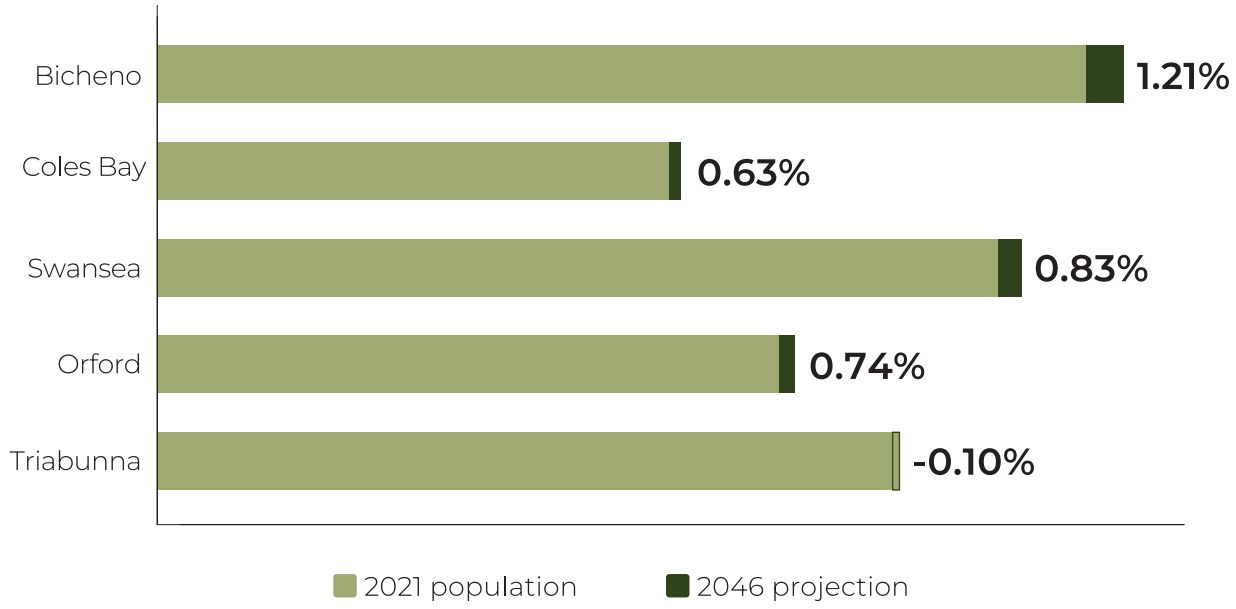


Figure 6 Population growth and decline projection by locality

The median age is also projected to increase from 57 to 67, varying across the municipal area.

A summary of population projections for each locality is shown in Table 6.

Engagement opportunity

Population projections do not consider potential employment generating activities which can attract new residents as well as external factors which may change the attractiveness of an area as a place to live. Additionally, as evident across Tasmania in the last 10 years, population growth in many locations has exceeded the expectation of projections, particularly given they are based on historical long term growth rates. Determining an appropriate growth target for each town will be considered further as the structure plans are developed.

- What opportunities do you think a growing population can provide a township?
- Do you think some towns have greater capacity for growth than others?
- What sort of services and facilities will townships need as they grow?
- There are a range of work opportunities in Glamorgan Spring Bay area, can you think of any opportunities for growth that might increase the numbers of people moving to the area?

Table 6 Summary of REMPLAN population projections for Glamorgan Spring Bay by locality

Population Statistics	Bicheno	Coles Bay	Orford/ Triabunna	Swansea	Glamorgan Spring Bay TOTAL
2023 population	952	515	1389	835	5242
2046 population	1234	603	1488	998	6079
Difference	282	88	99	163	937
2023 Median age	62	N/A	55	51	57
2046 Median age	65	N/A	61	55	67
Natural change 2012 to 2046	-6	N/A	-1	-7	-32
Net migration 2012 to 2046	12	N/A	9	4	-36

The population overall will continue to increase, however migration and natural change in population (through births and deaths) will decline. The median age will continue to increase to around 67 in 2046.

With an increase in population of around 837 people, additional dwellings and services will be required to cater to a growing population. Housing and services will also need to be responsive to the needs of an older population with more than half the population aged over 60 years.

3.3 Housing and residential activity

On census night 2021, the ABS recorded a total of 2,085 occupied dwellings compared to 2.358 unoccupied private dwellings in Glamorgan Spring Bay local government area. This suggests around 47% of dwellings are occupied by permanent residents, with the other 53% being used for seasonal population (holiday homes) and visitor accommodation (excluding private dwellings solely used for visitor accommodation).

The number of dwellings approved increased from 82 in 2021 to 108 in 2022. The total value of building was $48 million in 2022 distributed between residential building ($42 million) and non-residential building ($6 million).

The provision of new residential land is being facilitated through subdivision approvals including:

- 17 new lots on Coles Bay Road in Coles Bay
- 178 new lots across Swansea, with additional potential yield across the town
- 67 lots across Orford and Triabunna, with additional potential yield across the town

The creation of approved lots will vary based on the developer. Whilst most of these subdivisions were approved within the last three years, some go as far back as 2010 without reaching completion.

Of the 2,085 occupied private dwellings recorded in Glamorgan Spring Bay in the 2021 census, 52.8% are owned outright, and 22.4% are owned with a mortgage, and 20.3% of homes are rented.

The area has a strong seasonal population with 46.8% of dwellings unoccupied on census night (10 August in 2021). However, this differs between the towns. Triabunna (71.7%) and Swansea (62.6%) predominantly have occupied private dwellings while Coles Bay is at the other end with predominantly unoccupied dwellings (74.4%), closely followed by Orford with 67.2% unoccupied dwellings. Bicheno has 48.7% occupied dwellings.

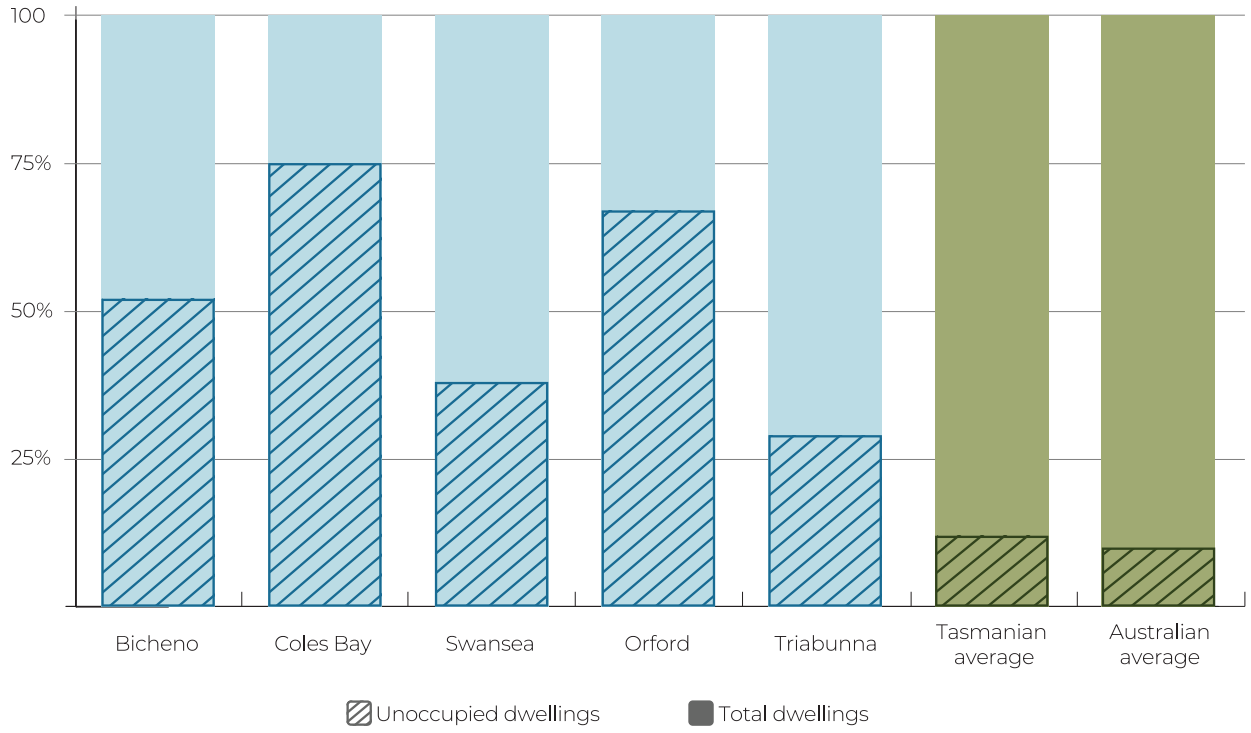


Figure 7 Unoccupied dwellings (data from ABS 2021 census data using Suburbs and Localities and Local Government Area geographic areas)

The majority (96%) of dwellings are detached houses, with a very small number of other housing types (REMPLAN 2023). A large number of dwellings (78%) are reported as having one or more spare bedrooms, with less than 3% requiring additional rooms (REMPLAN 2023). Homes housing 1 or 2 people comprise 78% of all households in the area (REMPLAN 2023).

According to the REMPLAN Housing Affordability Explorer (2023), 19% of mortgaged homes in Glamorgan Spring Bay have mortgage payments that exceed 30% of household income. Glamorgan Spring Bay ranks 441 out of 520 local government areas in terms of mortgage affordability, meaning there are 440 areas in Australia that are more affordable, and 79 areas that are less affordable. In Tasmania, 27 local government areas are more affordable, and 1 area is less affordable (Tasman).

There have been around 730 dwellings approved across Glamorgan Spring Bay since 2012 (refer to Figure 8 and Figure 9). This includes around 126 dwellings in the General Residential zone in Bicheno, 79 in Swansea and 121 in Orford/Triabunna. Coles Bay has approved around 77 dwellings in the Low Density Residential zone since 2012. Triabunna approved around 81 dwellings in the Low Density Residential zone.

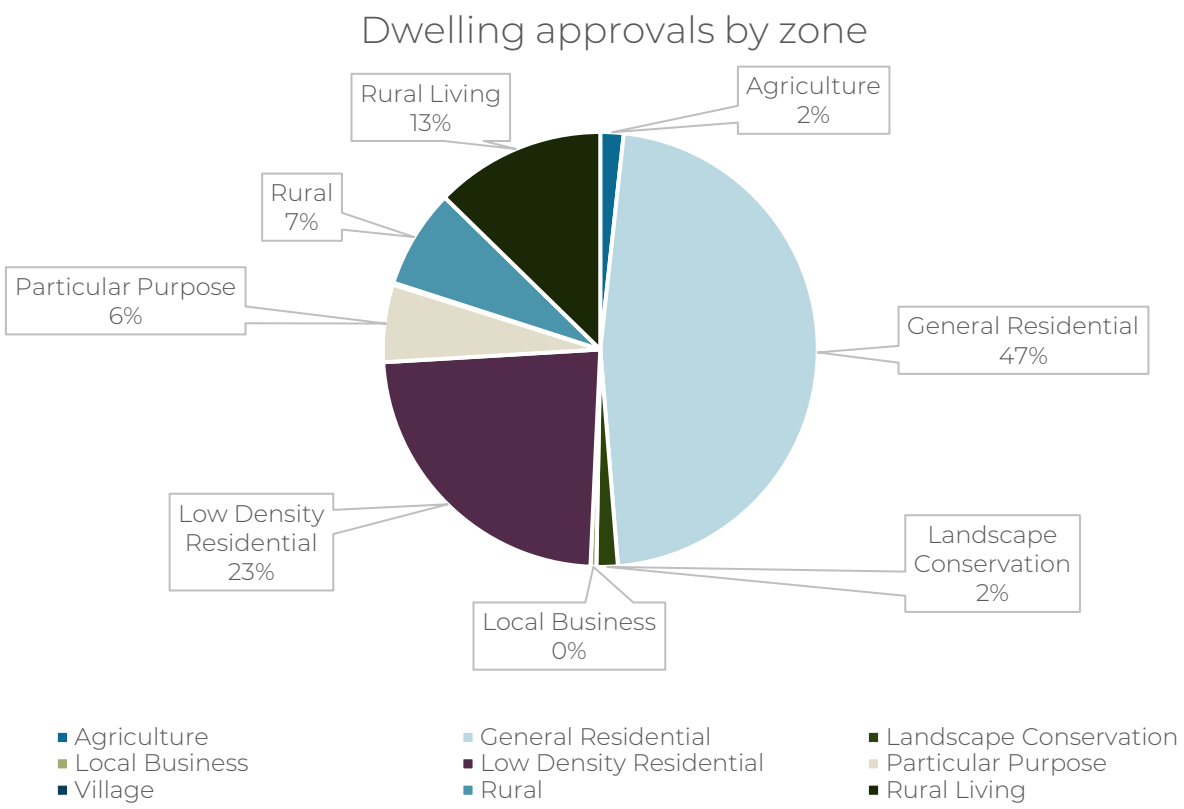


Figure 8 Dwelling approvals across Glamorgan Spring Bay by zone 2012 to 2022 (data provided by Glamorgan Spring Bay Council)

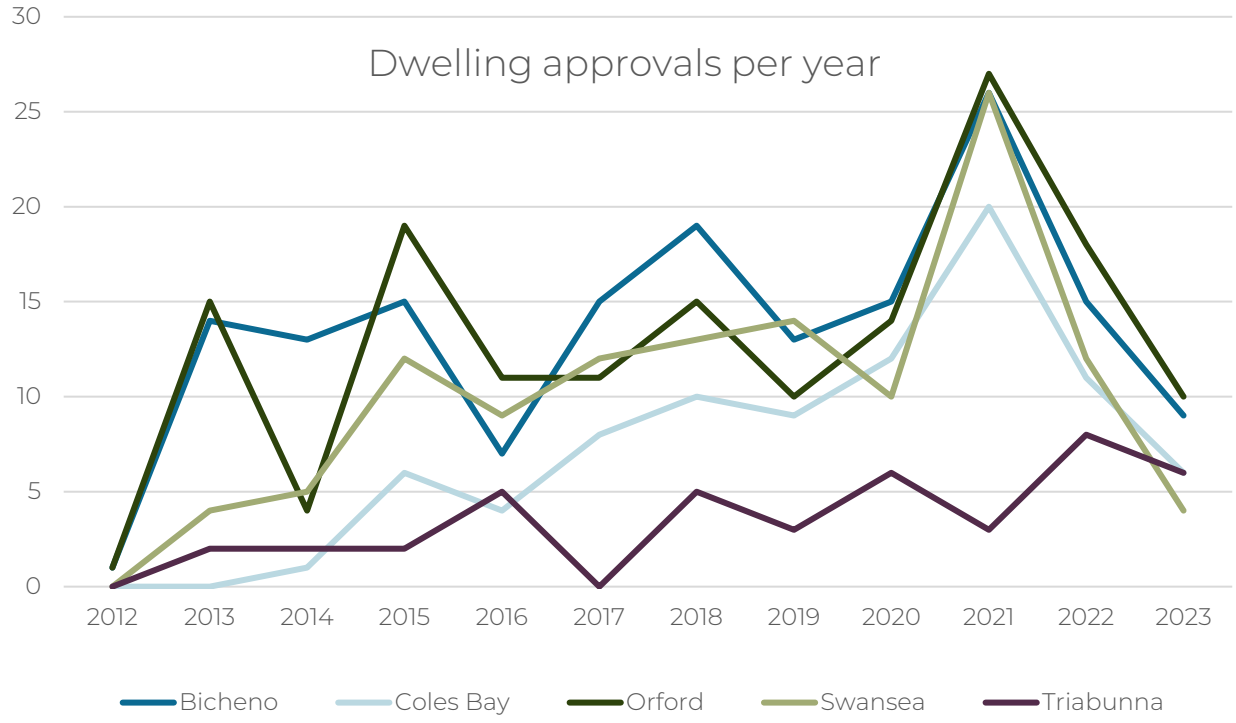


Figure 9 Total dwelling approvals per year across each township

Glamorgan Spring Bay generally has a higher rate of outright home ownership than Tasmania and Australia (refer to Table 7 below). Homes owned with a mortgage are consistently lower than the average across Tasmania and Australia, and the rate of rentals is around the same.

Table 7 Occupied dwelling ownership across Glamorgan Spring Bay*

Ownership	Owned outright	Owned with a mortgage	Rented	Owned outright	Owned with a mortgage	Rented
Locality		**2011***			**2021****	
Bicheno	139 (50.2%)	47 (17%)	83 (30%)	171 (49.6%)	72 (20.9%)	90 (26.1%)
Coles Bay	48 (46.2%)	19 (18.3%)	33 (31.7%)	65 (43%)	31 (20.5%)	53 (35.1%)
Orford	100 (45.7%)	58 (26.5%)	47 (21.5%)	160 (58%)	60 (21.7%)	48 (17.4%)
Swansea	130 (52%)	52 (20.8%)	60 (24%)	172 (54.8%)	54 (17.2%)	71 (22.6%)
Triabunna	131 (43.8%)	75 (25.1%)	82 (27.4%)	136 (43.2%)	84 (26.7%)	79 (25.1%)
Glamorgan Spring Bay	845 (49.1%)	390 (22.7%)	414 (24.1%)	1,101 (52.8%)	468 (22.4%)	423 (20.3%)
Tasmania	36.2%	34.2%	26.4%	37.1%	33%	26.4%
Australia	32.1%	34.9%	29.6%	31%	35%	30.6%

* ABS Census data using Urban Centres and Localities, State Suburbs (Coles Bay only) and Local Government Area geography types

The STRLUS also assigns settlement strategies to towns within the southern region to prioritise the location and character of residential development across the region.

Triabunna was identified as a district town with a moderate growth strategy. District towns provide additional administrative and commercial functions that support the lower order settlements such as townships and villages. In terms of higher order settlements supporting the area, the area is highly reliant on services in Hobart. For Triabunna and Orford, Hobart is the closest city providing higher order administrative and commercial functions. Swansea is equally as far from Hobart as from Launceston, based on travel time. Coles Bay and Bicheno are slightly closer to Launceston as a higher order settlement.

Bicheno and Swansea were considered townships with a moderate growth strategy. Coles Bay and Orford are low growth areas. Consolidation (primarily infill development) is the assigned growth scenario for Bicheno, Orford, Triabunna, and Swansea, with Coles Bay having a mixed growth scenario (greenfield and infill development).

Engagement opportunity

The updated structure plans are being prepared ahead of the review and update of the STRLUS and will inform regional level direction on growth in townships.

- Do you have any ideas about where future growth should be provided?
- What level of facilities does the town that you live in or is nearest to you provide?
- Do you currently travel to other towns to access services such as medical and dental services, education or training opportunities, work opportunities or specific services like a mechanic or hardware store?

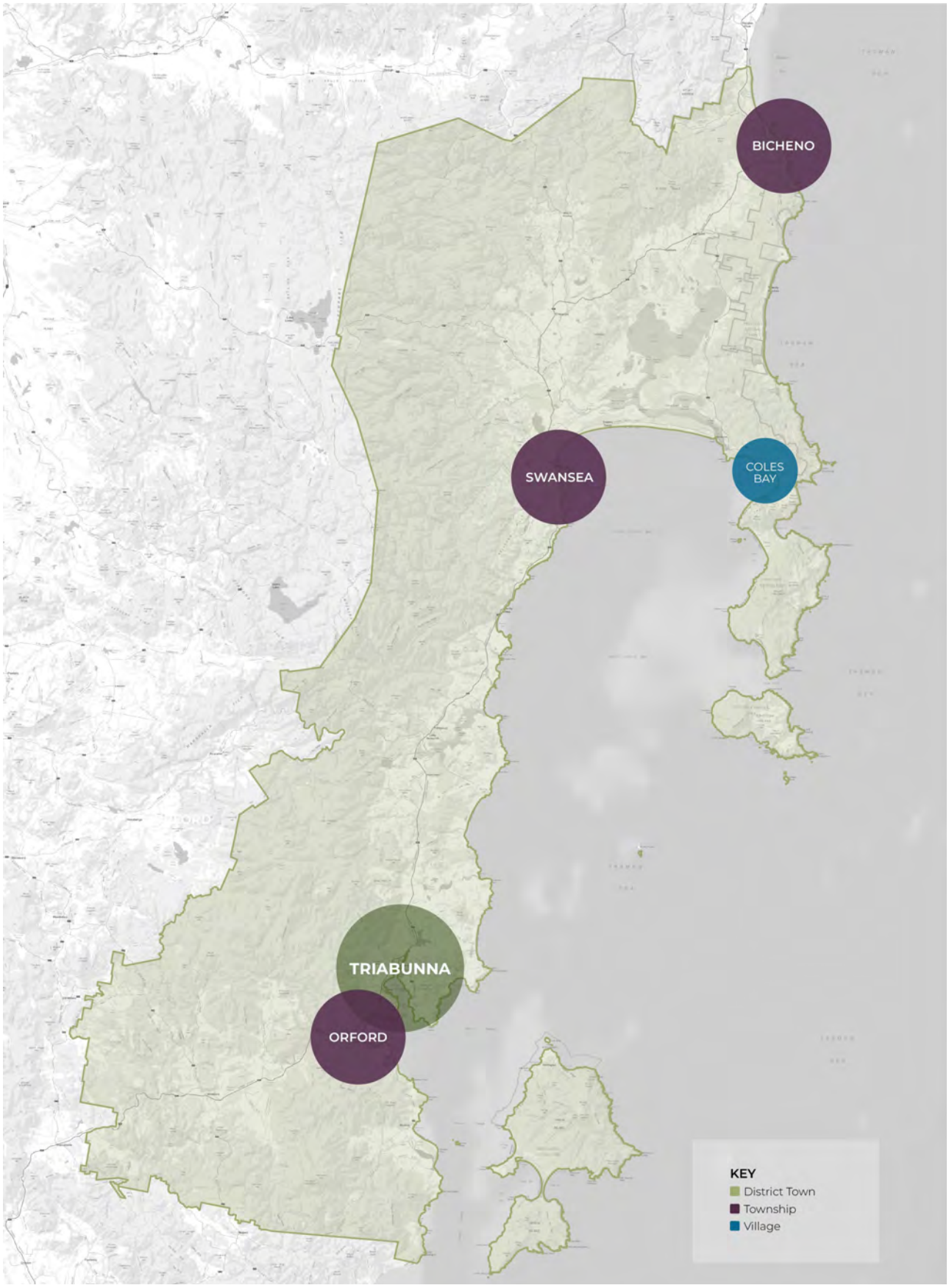


Figure 10 Existing hierarchy based on Southern Tasmania Regional Land Use Strategy

3.4 Key industries and employment profile

The key industries in Glamorgan Spring Bay include accommodation and food services, agriculture, forestry and fishing, and construction industries. In terms of output, agriculture, forestry, and fishing produced the largest output at a value of $133 million in 2021/2022, followed closely by the construction industry at $131 million[5]. This value is an increase of 40% from 2016/2017 to 2021/2022 for agriculture, forestry and fishing, and an increase of 45% for construction. These two industries represent around 56% of the total output for the municipal area.

Agriculture, forestry, and fishing is a significant part of the Glamorgan Spring Bay economy. The industry occupies nearly 94,000 ha of land within the area (ABS, 2021). The gross value of agricultural production in Glamorgan Spring Bay in 2020/2021 was $27.2 million, crop production was valued at $19.3 million, and livestock slaughter produced $3.4 million. In 2021, there were an estimated 147,218 sheep, being the primary livestock commodities in the area. Other livestock include dairy and meat cattle, pigs, and chickens (meat). Vegetable, broadacre crops and orchard fruit and nut trees occupied a total area of 1,137 ha in 2021.

The agriculture, forestry and fishing, construction, and accommodation and food services industries provide around half the jobs (912 in 2021) available in the area (Table 8)(ABS, 2021). There was a clear decline in the accommodation and food and beverage services employment between 2016 and 2021. This is likely due to the impact of COVID-19 and a reduction in tourism resulting in fewer jobs available in these industries. It is likely that these numbers will increase as the tourism industry rebuilds. There has also been a decline in the agriculture industry from 2006 to 2021, suggesting there are fewer opportunities in this area. Aquaculture has remained steady with a slow increase. The construction industry has seen moderate growth and continued increasing despite the pandemic. There was a significant decline in the manufacturing industry between 2006 to 2016. Forestry and logging declined from 3.39% in 2006 to 0.94% in 2021. This is likely due to the closure of the Triabunna woodchip mill in 2011. Employment in public administration and safety has also slowly declined.

[5] Based on economic analysis prepared for State Growh by .id informed decisions using the National Economics modelled series (National Institute of Economic and industry Research, 2021/2022).

Table 8 Key employment industries in Glamorgan Spring Bay

Industry	Glamorgan-Spring Bay (2021)		Glamorgan-Spring Bay (2016)		Glamorgan-Spring Bay (change from 2016 to 2021)		Glamorgan-Spring Bay (2011)	
	Persons	%	Persons	%	Persons	%	Persons	%
Accommodation	278	13.72%	195	11.99%	83	42.56%	216	13.25%
Food and Beverage Services	176	8.69%	125	7.69%	51	40.80%	103	6.32%
Agriculture	123	6.07%	91	5.60%	32	35.16%	120	7.36%
Aquaculture	101	4.99%	74	4.55%	27	36.49%	72	4.42%
Construction	173	8.54%	128	7.87%	45	35.16%	131	8.04%
Hospitals	57	2.81%	52	3.20%	5	9.62%	48	2.94%
Residential Care Services	27	1.33%	20	1.23%	7	35.00%	26	1.60%
Retail Trade	128	6.32%	165	10.15%	-37	-22.42%	160	9.82%
Education and Training	116	5.73%	77	4.74%	39	50.65%	97	5.95%
Manufacturing	115	5.68%	91	5.60%	24	26.37%	110	6.75%
Public Admin and Safety	91	4.49%	93	5.72%	-2	-2.15%	93	5.71%

3.5 Activity centres

The STRLUS assigns a four-tiered activity centre hierarchy to areas in Southern Tasmania based on their functions within the region and surrounding areas. The higher order Activity centres at the higher end of the hierarchy provides services to a greater area, and more services overall. A summary of the services provided in each town is shown in

Table 9. The services provided in each town are generally in accordance with those typical of the applicable activity centre type.

Triabunna functions as a District Town serving the daily needs of the surrounding community. District Towns are larger township located a significant distance from Greater Hobart. They provide administrative and commercial functions for sub-regions to reduce the travel needed to access services provided in higher order centres such as Hobart. District Towns function as main service centres for a sub-region providing a wider range of facilities and employment than is accessible in lower order activity centres. Triabunna provides public services above that of local centres including Service Tasmania, and the Triabunna District School.

Triabunna provides a wide range of commercial and retail business. Elphinstone Engineering is a significant employer within the area located at the northern end of Triabunna. The Spring Bay Mill provides conference and function services. Other businesses located in Triabunna include construction businesses, storage facilities, tourism providers, a number of food service businesses, visitor accommodation, and the IGA supermarket.

Bicheno, Orford, and Swansea are considered Townships with dominant town centres providing a variety of facilities, employment opportunities and shopping options. The population of townships is generally between 500 to 1500 people and include infrastructure for reticulated water and sewerage, and electricity,

Community services generally provided in Townships include public libraries, community halls, post office, medical centres, fire and police stations, primary school, public swimming pool and golf course.

Bicheno has a large number of visitor accommodation options, limited number of small businesses providing professional services, several cafes, and restaurants. Bicheno has one supermarket and a number of smaller retailers.

Orford provides a smaller offering of commercial and retail services including real estate office, Orford Bowling Club, landscaping services, visitor accommodation, a limited number of cafes, restaurants and pubs, and the Orford IGA.

Swansea provides limited retail and commercial services including a hardware store, professional services, a small number of cafes and restaurants, Swansea IGA, and express IGA.

Coles Bay is considered a Village. Villages provide basic community services and daily shopping needs. They are defined as having between 200-600 people and being serviced with electricity, and in some cases reticulated water and sewerage. Services provided in Villages generally include local shops, community halls, and a post office. Coles Bay is reliant on other towns for the provision of police and medical care.

Coles Bay has the Illuka general Store and village grocer for everyday shopping needs, a small number of restaurants and casual dining options, several visitor accommodation options.

Table 9 Activity centre service provision across the study area

Town	Bicheno	Coles Bay	Swansea	Orford	Triabunna
Activity Centre	Township	Village	Township	Township	District Town
Target population in STRLUS	500-1500	200-600	500-1500	500-1500	1000+
Actual population	1,076	515	997	685	905
Services associated with activity centre in STRLUS	✓Public library ✓Community hall ✓Post office ✓Medical/health centre ✓Fire station ✓Police station ✓Primary school ×Public swimming pool ✓Golf course.	✓Community hall ✓Post office ×Doctor ✓Fire Station ×Police station (part-time) ×Primary school ×Public swimming pool ✓Local convenience shop	✓Public library ✓Community hall ✓Post office ✓Medical/health centre ✓Fire station ✓Police station ✓Primary school ×Public swimming pool ✓Golf course	✓Public library ✓Community hall ✓Post office ×Medical/health centre ✓Fire station ✓Police station ✓Primary school ×Public swimming pool ✓Golf course	✓Local government offices ×Public library ✓Community hall ✓Post office ×District hospital ✓Fire station ✓Police station (full time) ✓Ambulance ×State Emergency Services ✓Secondary school ✓Primary school ×Public swimming pool ×Indoor sports facilities ×Golf course

3.6 The visitor economy

Tasmania had 1.28 million visitors between July 2022 and June 2023 (Tourism Tasmania, 2023). The East Coast region had 414,000 visitors, of which, a total of 102,000 visitors stayed overnight in Coles Bay, 86,000 in Bicheno, 65,000 in Swansea, and 22,000 in Orford. Visitor numbers for Triabunna were included in the balance of visitors to the East Coast and unable to be determined.

The average visitor spend for an overnight stay in Tasmania is $322 per night. This represents a potential $81.79 million spent in Coles Bay over 254,000 visitor nights, $49 million in Bicheno over 153,000 visitor nights, and $41 million for Swansea over 128,000 visitor nights.

Visitation to the east coast region has increased 70% from 2022. This trend has been seen across many regions of Tasmania and is likely a factor of the tourism market returning to pre-COVID levels over the period from June 2021 to now.

The total estimated number of visitors to the area has steadily increased since March 2021 after a steep decline over the COVID period. Current numbers now exceed the peak seen in September 2018. The majority of visitors are from NSW, Queensland, and Victoria, and around 50% of visitors have an annual household income over $100,000. Nearly 60% of visitors to the area do not have children. These figures are generally similar across Tasmania. Interstate visitors to Tasmania account for 88% of all tourists, and 81% of all visitors to the East Coast.

Tourists to the area generally engage in the following activities:

- Visiting national parks, historic sites, and attractions.
- Bushwalking, seeing wildlife in their natural habitat, outdoor activities.
- Visiting markets, museums, wineries, galleries, gardens, breweries and distilleries, performances.

The number of visitors to Freycinet National Park increased at a rate of 9% per year prior to 2020. It is expected to continue growing at a rate of around 3.5%, similar to the compound annual growth rate expected for overall tourism numbers of 3.1%.

Visitors to Tasmania predominantly stay in hotels/motels (49%), with rented houses accounting for 30% of accommodation used by visitors. Other paid accommodation, in order of use includes, caravan parks, guest houses/B&Bs/Airbnbs, Wilderness Lodges, and youth hostels and backpackers.

Engagement opportunity

- How do you think tourism impacts on towns in the municipal area?
- Do you think the towns in Glamorgan Spring Bay have adequate facilities such as public toilets, dump points, places to stay, and shops, to service the growing visitor economy?

3.7 Infrastructure

3.7.1 Roads

Council's operational plan aims to complete 80% of unsealed network road grading annually. An assessment of the road network is completed annually to ensure a municipal standard is achieved. The current budget for road renewal is insufficient. However, the forecasted budget over the next ten years is expected to deliver a surplus by 2025, providing capacity for road upgrades where required. Council is

managing risk by improving vulnerable assets and ensuring priority maintenance, renewals and acquisitions are budgeted for. Council will also minimise the acquisition of non-essential new assets ensuring lifecycle costs are managed. This has potential implications for development of new residential land as larger projects will involve the development of roads. The lifecycle costs of new roads will put upward pressure on the maintenance budget.

The Tasman Highway is a key transport route, owned by the State Government. Upgrades will be carried out by State Growth along approximately 14 km of the Tasman Highway including a section north of Triabunna and another section between Pontypool Junction and Rocky Hills south of Swansea. This work is being funded by state and federal government as part of a tourism initiative.

In addition to already funded projects, the State Government has committed to undertaking a corridor study on the entire Tasman Highway Road corridor, including the highway within the Glamorgan Spring Bay municipal area. This project will look at opportunities and constraints along the highway corridor and will seek to prioritise projects for future funding opportunities. This project will be out for public consultation in the first quarter of 2024.

3.7.2 Stormwater, water, and sewer servicing

Council is responsible for stormwater pipes, stormwater pits, and stormwater detention and infiltration basins across the municipal area. There are currently stormwater issues across the area, associated with storm events and risk of inundation. Generally, the existing systems are inadequate, missing, or causing downstream issues. The inundation issues may be restricting the development of otherwise good quality land. Potential flood prone areas are mapped in the appendices.

The future budgets allocated for hydraulic infrastructure currently have a shortfall of about 20% per year over the next 10 years. Council is committed to providing for the operation, maintenance, renewal, and acquisition of hydraulic infrastructure assets to meet service levels set by Council in annual budgets. Major capital works for the next five years will prioritise projects identified in catchment plans to rectify system deficiencies. Additional works will be restricted to co-contribution to development works and progressed as demand requires. The budget shortfall is a concern as flooding events are increasing and reliant on the functioning of the stormwater system.

Council is also responsible for the Swanwick sewerage system and one pump station. This system provides 90 connections when fully subscribed but is not capable of being increased in capacity. The system requires additional investment to facilitate TasWater taking ownership. There is concern regarding leachate in Coles Bay and effluent leaching into the bay. Water sampling after major rain events has been carried out. There have been healthy sample results obtained around Muirs Beach, Coles Bay is very constrained in terms of area to place new infrastructure.

There have been complaints from residents in Swanwick regarding the inability to use toilets during high tides and flooding events. This is believed to be due to waterlogged soils impacting the capacity of septic tank systems.

3.7.3 Water and sewer

The impact of summer tourism and periods of drought present challenges in providing a reliable water supply to the East Coast. TasWater is carrying out master planning to investigate issues and opportunities for water and sewerage systems on a regional scale. This process will influence investment decisions across the state.

The distribution of land serviced by reticulated water and sewerage is shown in the serviced land maps provided in Appendix A to Appendix D.

3.7.3.1 Bicheno

The Bicheno water supply is reliant on the Apsley River. Low flows during drought period can be managed using existing off-stream storage in the network. TasWater are planning to build additional high-level storage in the network to alleviate low pressure currently experienced by some residents.

Bicheno is serviced by a sewerage treatment plant with a capacity of 450 kL per day. There are no concerns regarding capacity for existing and future growth unless significant rezoning occurs. Replacement of the rising main in Murray Street is currently planned. This will alleviate the loading on the Gordon Street sewerage pump station.

3.7.3.2 Coles Bay

Water in Coles Bay is supplied by a tributary of Saltwater Creek via Coles Bay dam. A backup water supply transfers water from Northern Tin Mines and Federals dam. TasWater is undertaking investigations to improve the reliability of the water supply.

GSBC is responsible for the Swanwick sewerage system and one pump station. This system provides 90 connections and is over capacity. The system requires additional investment to facilitate TasWater taking ownership. There is concern regarding leachate in Coles Bay and effluent leaching into the bay. Water sampling after major rain events has been carried out. There have been healthy sample results obtained around Muirs Beach, Coles Bay is very constrained in terms of area to place new infrastructure.

3.7.3.3 Swansea

Swansea water is sourced from the Meredith River and Swan River via Meredith dam off-stream storage. There are no current supply concerns and future growth can be accommodated.

Swansea is serviced by a gravity network and sewerage treatment plant with a capacity of 430 kL per day. Upgrades will be required to accommodate future growth. The Maria Street sewerage pump station is being upgraded to accommodate current and future loading requirements. A new sewerage pump station is being constructed by a private developer to accommodate the Shaw Street loading, removing Shaw Street catchment from the Maria Street sewerage pump station. Existing deficiencies in the sewerage system are being resolved via planned capital works and investigations into infiltration and inflow issues.

3.7.3.4 Orford/Triabunna

Orford water supply comes from the Upper and Lower Prosser dams, and Triabunna's water. These flows are affected by extended dry periods. TasWater is investigating options to improve water supply security.

Triabunna's water supply comes from Brady's Creek dam which experiences flow issues during extended dry periods and can cause water quality issues. TasWater has reviewed this issue and is working to improve the aeration system and remove sedimentation. The water supply for Orford and Triabunna is vulnerable to dry climates and has experienced water restrictions. TasWater is preparing a Drought Response Strategy to address water supply security issues.

The projected water supply demand for the potential Solis development can be accommodated in the existing supply, however, storage and infrastructure requirements require further investigation. There are no known concerns regarding the potential Rheban Road subdivision.

Orford is serviced by a gravity network and sewerage treatment plant. This system has no current capacity concerns. The Orford sewerage treatment plant has a capacity of 473 kL per day. Upgrades to the sewerage treatment plant are currently being investigated and will be needed in the future to support the ultimate growth forecast for the town. These upgrades will occur in staged as needed.

The potential development of the Solis project will likely necessitate an upsizing of the system or a dedicated main to direct flows appropriately. Additional upgrades would likely be required to support specific developments.

Triabunna is serviced by a gravity network and sewerage treatment plant with a daily capacity of 253 kL per day. Upgrades will be required to support the ultimate future growth of the town. The Charles Street sewerage treatment plant is being upgraded to accommodate additional emergency storage and reconfiguration to reduce spills. The northern section of Triabunna is suspected to have stormwater inflow problems. This issue will be prioritised in the future as part of the infiltration and inflow investigation program.

3.8 Community and recreational facilities

Community and recreational facilities are essential to supporting the health, enjoyment, and wellbeing of residents. Each town within the study area includes a post office, fire station, ambulance station, community hall, and supermarket. Police stations and primary schools are provided in all towns except Coles Bay, and Triabunna District School provides secondary education. The existing medical practices at Bicheno and Triabunna have now come under new management by a not-for-profit group called cohealth. Coles Bay has no medical services and is reliant on the surrounding towns for access to doctors and medical services. Majority of known community and recreational facilities are shown below.

The community and recreational facilities provided across the municipal area include:

Bicheno

- Bicheno Golf Course
- Bicheno Skatepark (under construction)
- Bicheno Bowls and RSL Club
- Bicheno Library
- Bicheno Primary School
- Waubs Bay Gallery
- Waubadebars Grave Historic Site
- Cohealth medical practice
- Gulch public boat ramp

Coles Bay

- Esplanade East Boat ramp
- Muirs Beach boat ramp
- Freycinet national park
- Rita and Doris Reserve
- Coles Bay Conservation Area
- Harold Street playground
- Parks and Wildlife Service visitor services centre

Swansea

- Swansea golf course
- Swansea jetty and boat ramp
- Swansea Bowls Club
- Swansea community library
- Swansea primary school
- East Coast Heritage Museum
- Bark Mill Tavern and Museum
- Baudin memorial
- May Shaw residential aged care
- Community Health Centre
- Swansea Medical Centre
- Saltwater Creek picnic area
- Freycinet Volunteer Marine Rescue

Orford

- Orford Golf Course
- Northern and southern Prosser boat ramps
- West Shelly Rd boat ramp
- East Shelly Rd boat ramp
- Orford Recreation Ground and Bowls Club
- Eastcoaster resort
- Prosser House Day Care Centre
- Orford Library
- Orford primary school
- Prosser House Day Care Centre
- Orford Beach picnic area
- Our Park, Walpole St

Triabunna

- Triabunna sportsground and football club
- Spring Bay RSL
- Spring Bay Yacht Club
- Deepwater Jetty
- One Tree Point boat ramp
- Spring Bay Tennis Club
- Triabunna district school
- Triabunna Child Care Centre
- Gallery Artspaces
- Spring Bay Maritime and Discovery Centre
- Tasmanian Seafarers Memorial
- Spring Bay Community Health Centre
- Cohealth medical practice
- Foreshore area including picnic areas and boat ramp
- Service Tasmania
- East Coast Cruises and Maria Island Ferry Service
- Parks & Wildlife Office

3.9 Natural features

Glamorgan Spring Bay includes significant natural features that attract residents and visitors to the area. Freycinet National Park is located next to the town of Coles Bay, with the internationally listed wetlands Apsley Marches and Moulting Lagoon just north of the town. Douglas Apsley National Park is to the west of Bicheno. The coastline between Bicheno to Orford includes beautiful coastal areas, and vistas to Maria Island National Park which exemplify the natural values of importance in the municipal area.

Freycinet National Park provides significant recreational opportunities for visitors, including camping, hiking, fishing, and water sports. It includes multiple beaches and is famous for Wineglass Bay and the Hazards.

Maria Island is located off the coast of Triabunna and is accessed via ferry from the Triabunna Wharf. It has rich history as a World Heritage Australian convict site and is well known for the Painted Cliffs, beaches, hiking, and camping.

Apsley Marshes and Moulting Lagoon are located west and south of Bicheno. Therse natural areas are important for the conservation of wetland birds species. The wetlands also provide recreational activities including hiking, recreational shooting, fishing, and boating, aquaculture, and off-road driving.

The coastline from Coles Bay top south of Orford is mapped as a shark refuge area. Shark refuge areas provide important habitat for the breeding of school and gummy sharks, skates, and rays. These areas restrict the taking if sharks skates and rays and place limitations on fishing gear allowed in the area.

The Governor Island Marine Nature Reserve is located offshore from Bicheno and includes Alligator Rock. This is a protected area that provides some of the best temperate diving locations in Australia.

Old Mines Lagoon is located to the north of Bicheno. Denison Beach extends along the northeastern coastline of the study area, located on Maclean Bay. Diamond Island located off the coast to the east of Waubs Bay closest to town centre. Lookout rock state reserve. Whalers lookout part of the Gulch area Bicheno jetty and boat ramp at Waubs Esplanade near marine reserve part of the gulch area which is being upgraded

Swansea study area is bordered by Meredith River to the north which flows into Great Oyster Bay. Saltwater Creek runs through the study area and provides a natural boundary for the town centre. Waterloo Point forms a central focus for the town centre and the connection to the coast.

Triabunna is bordered by Maclaines Creek to the west, with Vicary's Rivulet forming a natural boundary for the town centre to the east and flowing into Spring Bay south of the town.

The town of Orford is located on Prosser Bay with Prosser River running along the northern boundary of the town centre. There is a bridge over the Prosser River connecting the areas adjacent Orford Beach and Raspins Beach. Orford Rivulet cuts through the study area south of the town centre.

There is extensive native vegetation outside the boundaries of the study areas, with pockets of various threatened native vegetation communities.

3.10 Significant projects

There are a number of significant projects currently proposed for the municipal area, including residential land subdivision, industrial subdivision, commercial development, and community infrastructure projects. Across the municipal area there are development projects proposing a potential 349 residential lots, 43 industrial lots, new commercial and retail business in Swansea and Triabunna, upgrades to public open space and community infrastructure. Assuming the Piermont and Solis development progress, this would add an additional 329 strata lots, and a potentially significant number of residential lots. The actual yield of residential lots will be determined based on land use constraints such as inundation and bushfire risk.

3.10.1 Bicheno

There are several projects underway in Bicheno that will provide a central focus and help to revitalise the town including:

- Redevelopment of the Gulch Area. Bicheno Gulch provides access to the foreshore and marine reserves off Waubs Bay. Redevelopment of the Gulch area is proposed including upgrades to footpaths, parking areas and wharf area.
- Bicheno Triangle Redevelopment Project will redevelop underutilised public space in the town to improve the use of the area and provide beautification to the town centre. This development of the triangle was identified in the 2014 structure plan as a key way to revitalise the town centre and provide a central focus.
- A new skate park development in the foreshore.
- New ambulance station.
- Bicheno also has a proposal under consideration for rezoning and subdivision of 23 residential rural living lots.
- 35 industrial lots approved, 23 of which have been titled.

These developments will improve the amenity and appearance of the town, which is likely to attract visitors and residents alike. The industrial subdivision provides the opportunity for more employment in the area and diversification of the economy.

3.10.2 Coles Bay

Coles Bay is undergoing development that will support ongoing tourism and improve the recreation and open space facilities including:

- Coles Bay foreshore path development from Muirs Beach to Jetty Road.
- Freycinet Visitor Gateway Project.
- An approved 17 lot residential subdivision progressing through engineering design.

Improving the recreation facilities in the public open space and revitalising the gateway to Freycinet will help support the enjoyment of the town by residents and the ongoing visitor economy. Additional residential lots will assist in meeting the future demand as the population grows, noting that the developable land within Coles Bay is very limited.

3.10.3 Swansea

Swansea has multiple commercial and residential developments currently being considered including:

- Multiple commercial developments along Franklin Street proposing a potential:
  - 19 dwellings
  - Café/restaurant
  - Wine bar
  - Retail/commercial units
  - Visitor accommodation (10 units)
  - Sailing club and function rooms
- Piermont Resort has approval for up to 329 strata title lots.
- Residential subdivision projects with potential for >120 lots.

The proposed commercial and retail development within Swansea will provide residents and visitors with more options for leisure activities in the town while also attracting visitors and providing accommodation to cater to overnight visitors. There is a significant number of potential residential lots and strata title lots proposed which would facilitate future population growth in the town. Improving the commercial and retail offerings is also likely to attract new residents to purchase land in the area.

3.10.4 Orford/Triabunna

Orford has the following major projects underway:

- The development of the Orford Foreshore Masterplan
- Upgrade of the sewerage system by TasWater.
- Planning scheme amendment for Rheban Road for up to 90 residential lots.
- Louisville Road residential subdivision of 14 lots has been constructed.
- Residential subdivision projects with potential for >45 lots.

The development of the Orford foreshore will help to revitalise the town and attract new residents and visitors, while improving the amenity of the town for existing residents. Upgrades to the existing sewerage

system will help to ensure the potential residential subdivision can be accommodated. This, in turn, will support the forecast population growth for the area.

Triabunna has a mixture of development projects underway including:

- Approval for seven residential lots on Franklin Street.
- Approval for 40 residential lots on Charles Street, Victoria Street and Esplanade East.
- Approval for 6 residential lots at Inkerman Street.
- Approval for an 8 lot industrial subdivision on Slipway Road.
- Potential redevelopment of the old Council building and foreshore to provide a combination of:
    - visitor accommodation units; and
    - residential units; and other tourism based uses including restaurant and cellar door.
- Potential wind farm;
- Potential future development of the Solis site at Louisville Road.

New lots in the Local Business zone will help facilitate additional commercial and retail development within Triabunna. Up to 54 new residential lots are being created across the town which will help meet projected future population growth. The redevelopment of the old Council building and foreshore will provide additional amenity to the town for residents and visitors. A potential wind farm would offer new employment opportunities and diversification of the economy for the area. The Solis project has been under consideration for several years. It is still an uncertain development at this time. However, its development would be significant to the area through the provision of residential land, a golf course and associated development.

4 Glamorgan Spring Bay in the future

Glamorgan Spring Bay is predicted to increase in population by 961 people by 2046. The number of overnight visitors to the area is expected to increase by 95%. It is predicted that an additional 1,721 dwellings will be required to cater for additional residents as well as seasonal and visitor accommodation demand.

As outlined in section 3.1 projections do not however consider additional employment generating activities which may support new residents to the area, nor do they consider external factors which may mean that towns in Glamorgan Spring Bay area attract a higher growth rate than expected. The last 10-year period has shown that growth in certain areas of Tasmania, including Glamorgan Spring Bay, growth has exceeded expectations.

	Now 2023	Projected to 2046
 Population	**5,242** Permanent residents	**6,079 (up 16%)** Permanent residents
 Housing	**2,085** Occupied dwellings	**+1,023** Homes needed for permanent residents
 Tourism	**>275,000** Overnight visitors	**537,000**[6] Overnight visitors
 Dwelling Occupation	**2,358** Unoccupied dwellings	**3,378** Unoccupied dwellings
 Vacant land	**453 ha** Vacant land	**3,700** Potential lots

Engagement opportunity

- Where do you think we should be providing for additional dwellings as the community grows?
- In your opinion, what opportunities does a growing community provide for you?
- What sort of facilities are needed in the municipal area to support the growth in overnight visitors to the area?

[6] Assumes annual growth rate of 3.1% for visitors to Tasmania.

4.1 Housing supply and demand

Housing supply and demand in the Glamorgan Spring Bay area is based on the predicted future population growth which helps determine dwelling demand, as well as the increased need for visitor and work accommodation in private dwellings. Glamorgan Spring Bay also has a strong seasonal population, which accounts for around half of the private dwellings in the area. The supply of land is based on the existing vacant land in zones appropriate for residential development, consideration of land constraints, and the minimum lot size permitted in each zone.

4.1.1 Supply

Glamorgan Spring Bay has a large area of undeveloped land across different zones. Not all vacant land is suitable for development. A summary of the vacant land is provided for each zone in Table 10.

Table 10 Vacant land across Glamorgan Spring Bay

	Bicheno	Coles Bay	Swansea	Orford/ Triabunna	GSBC area
Zone	**Area of vacant land (ha)**				
General Residential	11.58	--	42.76	33.79	88.13
Future Urban	--	--	--	14.53	14.53
Low Density Residential	--	24.24	--	83.46	109.16
Rural Living	64.61	--	108.98	83.29	299.31
Local Business	1.1	2	0.72	0.72	4.54
Light Industrial	45.83	--	--	0.7	46.53
Rural	27.89	173.54	223.83	71.45	2864.52
Agriculture	--	--	53.52	4.55	341.57
Landscape Conservation	5.99	--	--	58.3	794.13
Utilities	--	0.14	--	1.25	98.61
Recreation	44.09	--	--	--	44.09
Open Space	--	--	--	21.29	21.29
Particular Purpose	10.01	--	--	--	270.92

Residential land supply within Glamorgan Spring Bay is primarily zoned General Residential and Low Density Residential under the Tasmanian Planning Scheme – Glamorgan Spring Bay.

In the background analysis maps (Appendix A) currently vacant residential land in each study area is identified. within Glamorgan Spring Bay. The total area of vacant land zoned for future residential development (General Residential, Low Density Residential, and Rural Living) in the study area is 452.71 hectares.

Underutilised land has been determined on the basis of land with an existing dwelling that has a site area sufficient for subdivision under the applicable zoning (900m^2 for General Residential zoned land, 3000m^2 for Low Density Residential zoned land and 2 ha for Rural Living zoned land). The amount of potentially underutilised land is detailed in Table 11 which also outlines the potential dwelling yield of this land across two scenarios.

In considering the potential dwelling yield, it is important to note that the minimum lots size allowed under the General Residential zone standards are not reflective of the current subdivision character in the towns. For example, a significant number of existing developed lots in the General Residential Zone are over 900 m^2. Theoretically these are capable of subdivision under the planning scheme, but realistically this is unlikely to occur except on an occasionally site. This will affect the capacity of the existing zoned land to accommodate additional growth.

Understanding the practical developability of vacant and utilised land is a key further investigation area going forward in the preparation of structure plans for the towns. The potential lot yield of existing vacant land is estimated in Table 11.

Table 11 Dwelling yield analysis for Glamorgan Spring Bay

Zone	Number of lots	Total area (ha)	Potential yield*	Conservative yield**
Bicheno				
General Residential	147	11.58	225	82
Rural Living	38	64.61	56	16
Future Urban	2	33.38	649	238
Coles Bay				
Low Density Residential	166	24.24	141	60
Swansea				
General Residential	105	42.76	831	305
Rural Living	45	108.98	95	27
Orford/Triabunna				
General Residential	204	33.79	657	241
Low Density Residential	156	83.46	486	208
Rural Living	34	83.29	72	20
Future Urban	2	14.53	282	103
Total potential lot yield (General and Low Density)			**2,370**	**896**
Total potential lot yield (Rural)			**223**	**63**
Total potential lot yield* **			**3,700**	**952**

* Based on minimum lot size permitted in zone, where the area developable is at a rate of 87.5% to account for access and land development constraints. General Residential and Particular Purpose minimum lot size is assumed to be 450 m^2 per dwelling. Low Density Residential minimum lot size is assumed to be 1,500 m^2 per dwelling. Rural Living minimum lot size is assumed to be 10,000 m^2 per dwelling. Assumes 12.5% reduction in available land due to provision of road, infrastructure, and open space

**Based on average lot size, where the area developable is at a rate of 50% to account for access and land development constraints. General Residential and Particular Purpose lot size is assumed to be 700 m^2 per dwelling. Low Density Residential minimum lot size is assumed to be 1,500 m^2 per dwelling. Rural Living minimum lot size is assumed to be 20,000 m^2 per dwelling. Assumes 12.5% reduction in available land due to provision of road, infrastructure and open space

***does not include yield from future urban or particular purpose land

Additional lots could potentially be provided if underutilised land across the municipality was developed at a higher rate. The underutilised land in Glamorgan Spring Bay has been calculated and assessed to determine the potential lot yield as shown in Table 12

Table 12 Underutilised land within Glamorgan Spring Bay

Zone	Number of lots	Total area (m^2)	Potential yield*	Conservative yield**
Bicheno				
General Residential	288	617,187	912	152
Particular Purpose	7	334,549	643	231
Rural Living	70	2,012,080	18	0
Coles Bay				
Low Density Residential	30	351,461	175	87
Swansea				
General Residential	295	947,522	1547	381
Rural Living	87	2,919,740	40	0
Orford/Triabunna				
General Residential	654	1,425,510	2117	364
Low Density Residential	153	1,371,680	6471	304

*Based on minimum lot size permitted in zone minus the number of lots (as an indicator of existing dwellings), where the area developable is at a rate of 87.5% to account for access and land development constraints. General Residential and Particular Purpose minimum lot size is assumed to be 450 m^2 per dwelling. Low Density Residential minimum lot size is assumed to be 1,500 m^2 per dwelling. Rural Living minimum lot size is assumed to be 20,000 m^2 per dwelling.

**Based on average lot size, where the area developable is at a rate of 50% to account for access and land development constraints. General Residential and Particular Purpose lot size is assumed to be 700 m^2 per dwelling. Low Density Residential minimum lot size is assumed to be 1,500 m^2 per dwelling. Rural Living minimum lot size is assumed to be 20,000 m^2 per dwelling. Assumes 12.5% reduction in available land due to provision of road, infrastructure, and open space.

4.1.2 Demand

The forecast dwelling demand for Glamorgan Spring Bay is based on REMPLAN population forecasts. The forecast considers the growth in the permanent population by 961 persons, and the rate of occupied versus unoccupied dwellings. Based on a decreasing dwelling occupation rate of 2 persons in 2021 down to 1.78 persons per household in 2046, Glamorgan Spring Bay will need an additional 1,721 private dwellings by 2046. This will be split, with an estimated 873 occupied private dwellings and 848 unoccupied private dwellings.

Glamorgan Spring Bay had a total of 4,443 private dwellings as of 2021 (census data). The total number of occupied dwellings on census night was 2,085, meaning that over half the existing dwellings are used only intermittently. This suggests that the unoccupied dwellings are used by seasonal residents and visitors.

Demand for dwellings can be estimated on the basis of two components:

- Projecting the average number of new dwellings per year into the future; and
- Population growth projections and average household size taking into account dwelling structure.

The estimated population growth projections are outlined in Section 3.2 above. Demand for dwellings is shown in Table 13.

In regard to dwelling structure, at the 2021 census (dwelling structure by occupied/unoccupied dwellings) there were 2.358 unoccupied dwellings to 2,085 occupied dwellings in Glamorgan Spring Bay. The REMPLAN projections predict that an additional 617 occupied and 602 unoccupied dwellings between 2021 and 2038.

Table 13 Forecast dwelling demand through to 2043 for each township

	REMPLAN forecast*		Dwelling approvals forecast**
Bicheno			
Total dwellings	366		306
Occupied dwellings	234		199
Unoccupied dwellings	132		107
Coles Bay			
Total dwellings	n/a		154
Occupied dwellings	n/a		n/a
Unoccupied dwellings	n/a		n/a
Swansea			
Total dwellings	284		232
Occupied dwellings	137		114
Unoccupied dwellings	147		118
Orford/Triabunna			
Total dwellings	255	44***	462****
Occupied dwellings	75	44	323
Unoccupied dwellings	150	0	139

* Based on population growth and demographic projections
** Based on average annual dwelling approvals from last 10 years (Bicheno 15.3 dwellings per year, Coles Bay 7.7 dwellings per year, Swansea 11.6 dwellings per year, Orford/Triabunna 23.1 dwellings per year)
***Separate numbers for Orford and Triabunna are available in this datasets
Based on the average demand of 69 dwelling per year and the potential dwelling yield outlined in Table 11, the residential land supply equates to a 34 years supply under the minimum scheme requirement scenario.
**** It is reasonable to assume that most of this demand is in Orford.
**** Would be an oversupply under REMPLAN forecast by undersupply under dwelling approvals forecast.

4.1.3 Analysis

Glamorgan Spring Bay has a significant seasonal population with permanent residents accounting for approximately half the population. Dwellings in the area are used for permanent residents, seasonal residents, and visitor accommodation. The growth in permanent population and overnight visitors means there is a demand for additional dwellings in the area. It is difficult to accurate estimate dwelling demand as external factors to GSBC may have a significant impact.

Planning for residential land supply is a balance between ensuring that there isn't a future undersupply in the event of unexpected growth which can take several years t address through strategic plan updates but not an oversupply that affects the cost and efficiency of infrastructure and a sound growth pattern with efficient land use. The accepted best practice across Australia is to provide a 5-to-10-year supply with a 10-to-

15-year land bank, however in Tasmania with a less mature strategic planning system which does not always achieve periodic reviews it may not be sufficient.

The current supply of suitable zoned and serviced residential land varies from township:

- Bicheno has a theoretical undersupply if only taking into account vacant land. The holding of the future urban land within the Particular Purpose Zone is a key consideration for the development of the structure plan and is the realistic potential of underutilised land being made available.
- Coles Bay also has a theoretical undersupply but there are significant spatial constraints to its further expansion and potentially this demand will need to be accommodated in other areas of the municipality.
- Swansea has a theoretical oversupply, but it is a strongly aging population and suitability of land will need to be examined closely in the development of the structure plan.
- Orford/Triabunna has a theoretical oversupply based on the REMPLAN forecasts but an undersupply based on the dwelling approvals forecast. The differences between these two forecasts are likely to be associated with demand for holiday homes over the past 10 years particularly in Orford given its proximity to Greater Hobart.

The actual developability of vacant land may be a limiting factor and will need to be further investigated as will potential underutilisation of existing developed land.

The setting of the land supply is established on a metropolitan basis through the STRLUS and any adjustment to the strategic growth intentions for the area will need to be determined through a review of that strategy.

Implications

The initial analysis of demand against supply indicates the current supply of residential land is significantly above the accepted practice of maintaining 5 to 10 years supply of zoned land with a further 10 to 15 years supply as a land bank.

The structure plan will therefore need to consider:

- What is the most appropriate growth target/demand scenario to adopt into the future?
- What growth in holiday homes and visitor accommodation should be accommodated for?
- If existing land zoned for residential purposes and vacant is suitable in light of land constraints and values.
- If land identified as future urban land is suitable, necessary, or best identified for alternative purposes.
- The ownership of existing vacant land and the likelihood of being developed.
- Is land supply predominantly owned by one or two land owners, creating a controlling interest over supply?
- Is the land supply in the most suitable location?

4.2 Commercial and retail land

The amount of vacant commercial and retail land differs between the towns:

- Bicheno – 11,845 m^2
- Coles Bay – 20,764 m^2
- Swansea – 7,645 m^2
- Orford/Triabunna – 7,669 m^2

All the available land is zoned Local Business under the TPS.

The existing commercial land in Bicheno is considered underutilised.

The seasonal population of the area makes the feasibility of commercial and retail development more uncertain than in other areas with a more stable population.

There are a number of retail and commercial developments planned in the area including:

- Orford Foreshore Masterplan
- Redevelopment of the Morris Store on Franklin Street in Swansea
- Four commercial/retail units at 1B Franklin Street Swansea
- Redevelopment of the Bicheno Gulch
- Proposed skate park in Bicheno

Implications

There is significant area available for the development of commercial and retail business across the municipal area. The structure plans will need to consider:

- How to better utilise commercial land in Bicheno.
- How increased retail employment will impact the need for worker accommodation.
- Whether there is additional need for commercial and retail development in specific town, and if so, where, and how to facilitate this.

4.3 Industrial land

The Southern Industrial Land Study (SGS, 2020) considers the supply and demand of industrial land within Tasmania. The demand was forecast to 2026 and considered there to be a high demand scenario of 1.1 ha. The SGS report identified three vacant industrial lots within Triabunna with a total area of 3.7 ha. These sites were considered to have a suitable topography for development. Land near the Triabunna mill was also considered suitable for future industrial use.

The SGS report did not take into account the Light Industrial zoned land in Bicheno. Bicheno holds majority of vacant industrial zoned land in the area with 45 hectares available. Orford/Triabunna has 0.7 ha, with no vacant industrial land within the other towns in the study area. Subdivision of 35 lots has been approved for land at Granite Avenue in Bicheno with 23 of those lots now titled. An additional 8 lots are proposed at Slipway Road in Triabunna.

The location of industrial land in Glamorgan Spring Bay is considered to be a significant distance from economic centre and roads were considered sub-optimal, suggesting the land was best suited to transport, warehousing and export industries associated with aquaculture and commercial fishing, forestry, and use associated with the port facilities.

Implications

Based on the predicted demand of 1.1 ha of industrial land to 2026, it is considered likely that 45 ha of vacant light industrial land in Bicheno will provide sufficient coverage into the future. The structure plans should consider:

- The type of industrial development that will need to be facilitate – the light industrial zone provides fewer allowable uses than general industrial.
- How to facilitate the location of new industrial development to vacant land in Bicheno.
- How additional industrial development in Bicheno will affect employment and accommodation needs.

4.4 Community needs assessment

The median age is projected to increase from 57 to around 67, as the 50-80+ cohorts increase and a decline in the age groups of 5-14 year olds and 35-49 year olds. The number of births will decrease before leveling out around 2031. Deaths will steadily increase. Migration will remain steady, with most migration in the age range of 50-70.

The typical services and facilities prescribed for each level of activity centre provide guidance on what each town is expected to provide. Section 3.5provides an overview of the activity centre network and the role of each town in the study area. Section 3.8provides a summary of the key services and facilities provided in each study area. The majority of services expected for each activity centre are accommodated in the towns. Orford and Triabunna have a reciprocal relationship in their provision of services. The main services not currently provided include a district hospital and state emergency services at the district town (Triabunna) level, public swimming pools and indoor sports facilities. Orford and Coles Bay lack their own medical services and are accommodated by providers in nearby towns. Coles Bay lacks a number of services typically associated with a Village. However, Coles Bay also has a strongly seasonal population.

Whilst swimming pools are listed as a typical facility for District Towns and Townships, the location of these towns provides easy access to natural swimming facilities and there may not be a need for these facilities.

The future population profile of the area has an increasing median age. The specific needs of the changing population are not easily defined using the activity centre framework. Further analysis of the services needed, and the availability of providers is needed to fully understand what the area will need going forward.

Implications

The population demographics of Glamorgan Spring Bay are changing to an increasingly older population with more than 50% of residents aged over 60 years. This impacts the types of services needed to support the community. The structure plans will need to consider:

- Whether the health services available will facilitate ageing in place.
- The services and facilities required for an increasingly retired and semi-retired population.
- Whether the change in age profile will impact the provision of services available to the younger population, such as education and child health services.
- How will the population growth affect the role of each town in the activity centre hierarchy, particularly given the declining population of Triabunna.
- A general review of the services and facilities in each town based on those typically provided at each activity centre level.
- What dwelling typologies are needed to support ageing in place, and how can this be facilitated across the municipality.

4.5 Transport and access needs assessment

The municipal area is highly dependent on personal vehicle transport for travel between towns and to larger activity centres for additional services. Travel within the towns is more flexible with walking and cycling infrastructure available. There are very limited bus services provided by Tassielink between Hobart and Bicheno via Swansea, and between Coles Bay, Bicheno, and St Helens. Glamorgan Spring Bay has an average of 2.1 persons per household and an average of 2 vehicles per household. This suggests the majority of residents have their own private vehicle. This is fairly typical of Tasmania as a whole, however, the lack of alternative transport options means that there is a strong dependence on private vehicles, and consequently the ability to own and drive a car. Around 80% of employed residents travelling to work used cars, 12% walked, 13% worked from home, and fewer than 1% of residents travelled by bicycle, motorbike, scooter, or bus. This dependence on private vehicles could become a concern as fuel prices rise and affordability decreases.

Community transport is likely to become more important with an ageing population potentially being less mobile and more dependent on transport to access services outside the town boundaries. This includes transport to medical facilities such as hospital located in Launceston and Hobart.

Implications

The region has an ageing population with different service needs. There is a strong dependence on private vehicle transport with limited alternative transport. This has the potential to impact the accessibility of services located outside town extents, create isolation, and affect cost of living through changing fuel prices. The structure plans will need to consider:

- Whether there is a need or desire for alternative transport options within and between the towns and higher order activity centres.
- Whether the provision of services that will provide in-home services is sufficient to meet the needs of the residents.
- The safety of the road network, ability to access driver training, and any need for additional driver education.

4.6 Tourism demand

Tourism forecasting in 2017 predicted an increase in intrastate visitors from a compound annual growth rate of 2.3% over the 2014-2019 period to 3.1% over 2025-2030. Conversely, the compound annual rate of growth of interstate and international visitors was predicted to decrease by more than half to from 5.6% between 204-2019 to 2.5% between 2025 and 2030. Overall, the number of overnight visitors is expected to continue to increase.

The 2030 Visitor Economy Strategy commissioned by Tourism Tasmania in August 2023 suggests that Tasmania will see 2 million interstate and international visitors to the state by 2030 with a growth rate of 2.6% over 2025-2030. Intrastate trips by Tasmanians are also set to increase.

The State Growth Accommodation Supply Analysis for the East Coast prepared in 2017, identifies that private rentals make up 79% of visitor accommodation, with 68% of visitors staying in commercial accommodation.

Based on the 1.28 million people visiting Tasmania from July 2022 to June 2023, and a compound annual growth rate of 3.1%, Tasmania should achieve 1.5 million visitors over 2028 to 2029. The area from Triabunna to Bicheno was calculated to need an additional 223 rooms to account for an additional 1,600 nights. Excluding the visitor numbers between July 2019 and June 2022, Tasmania is on track to reach 1.5 million visitors by 2024.

Implications

The number of visitors to Glamorgan Spring Bay is expected to continue increasing. This helps the economy through direct contributions to local businesses and the provision of employment. It also impacts the character of the towns, influencing the rate of permanent residents, and requires ongoing services to meet demand through accommodation, food services, and activities. In addition, tourism introduces a large number of people who are unfamiliar with the area and less able to respond in an emergency. Therefore, the structure plans will need to consider:

- Whether the supply and type of accommodation is sufficient to support the growing tourism demand while ensuring sufficient private dwellings are available for residents and workers.
- How to ensure the desired future character of the towns is facilitated and protected whilst encouraging tourism that supports local businesses and livelihoods.
- How the provision of important information is provided to visitors to ensure the character of the area is respected, that visitors are able to access the full experience of each unique place, and that the safety of visitors is considered.

Appendix A Bicheno profile and maps

Population profile of Bicheno

Summary of key census statistics for Bicheno (Australian Bureau of Statistics, 2011, 2016 & 2021)

	Bicheno[1]			Glamorgan Spring Bay[2]			Greater Hobart[3]	Tasmania[4]
	2011	2016	2021	2011	2016	2021	2021	2021
Population								
Total	647	740	797	4,190	4,400	5,012	247,086	557,569
Female	313	366	387	2,071	2,159	2,436	126,562	283,804
Male	334	378	413	2,119	2,238	2,578	120,521	273,765
Median age								
Median age	50	53	53	53	56	57	39	42
Age profile								
0-4	4.8%	4.2%	3.9%	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	10.0%	9.4%	6.9%	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	6.8%	6.1%	5.6%	6.4%	5.9%	5.9%	11.4%	11%
25-54	19.6%	35.5%	37.4%	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	19.5%	21.7%	20.5%	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	24.9%	25.0%	27.8%	25.9%	29.5%	34.2%	18.8%	20.9%
Employment*								
Worked full time	43.2%	41.8%	42.8%	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	40.8%	40.1%	41.4%	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	5.8%	7.9%	6.3%	7.1%	5.3%	4.8%	6.2%	5.9%
Income								
Median weekly household income	$815	$854	$1,057	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$1,517	$1,083	$1,300	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$165	$180	$243	$160	$190	$250	$350	$290

[1] UCL621002 (ABS, 2011, 2016, 2021)
[2] LGA62410 (ABS, 2011, 2016, 2021)
[3] 6GHOB (ABS, 2021) ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.
[4] State/Territory 6 (ABS, 2021)

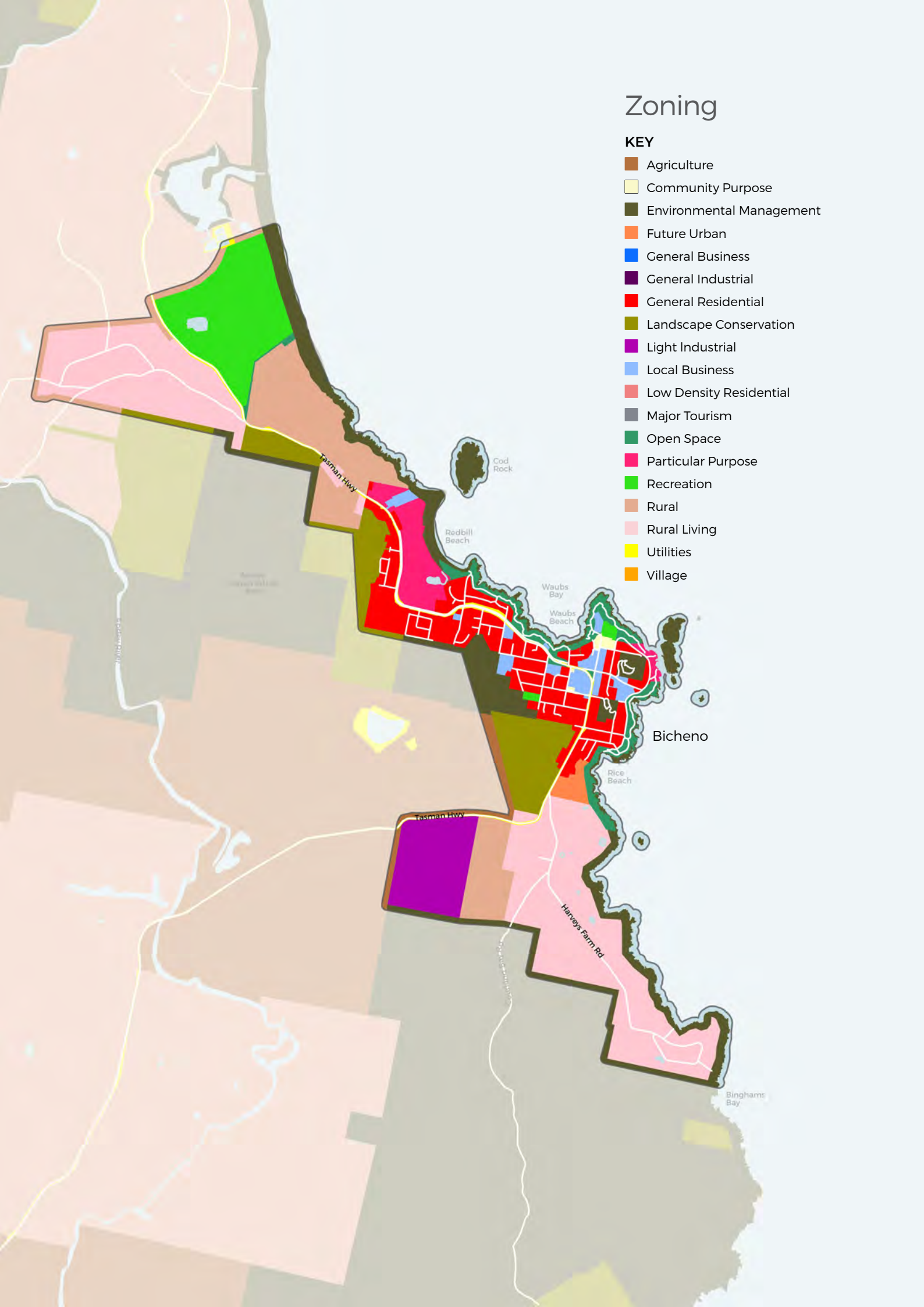
	Bicheno[1]			Glamorgan Spring Bay[2]			Greater Hobart[3]	Tasmania[4]
	2011	2016	2021	2011	2016	2021	2021	2021
Family structure								
Couple family without children	60.2%	62.9%	60.9%	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	26.0%	25.3%	25.8%	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	13.8%	10.2%	11.6%	10.4%	12.0%	11.0%	18.0%	17.3%
Other	0%	1.6%	3.4%	0.5%	0.6%	0.9%	1.6%	1.4%
Household type								
Family household	64.5%	61.1%	66.8%	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	33.3%	35.0%	29.8%	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	2.2%	4.0%	3.5%	2.8%	3.2%	2.4%	4.2%	3.4%
Household size								
Average person per household	2.1	2	2	2.1	2	2.1	2.4	2.4
Car ownership								
Average motor vehicles per dwelling	1.7	1.7	1.7	1.9	1.9	2	1.9	1.9

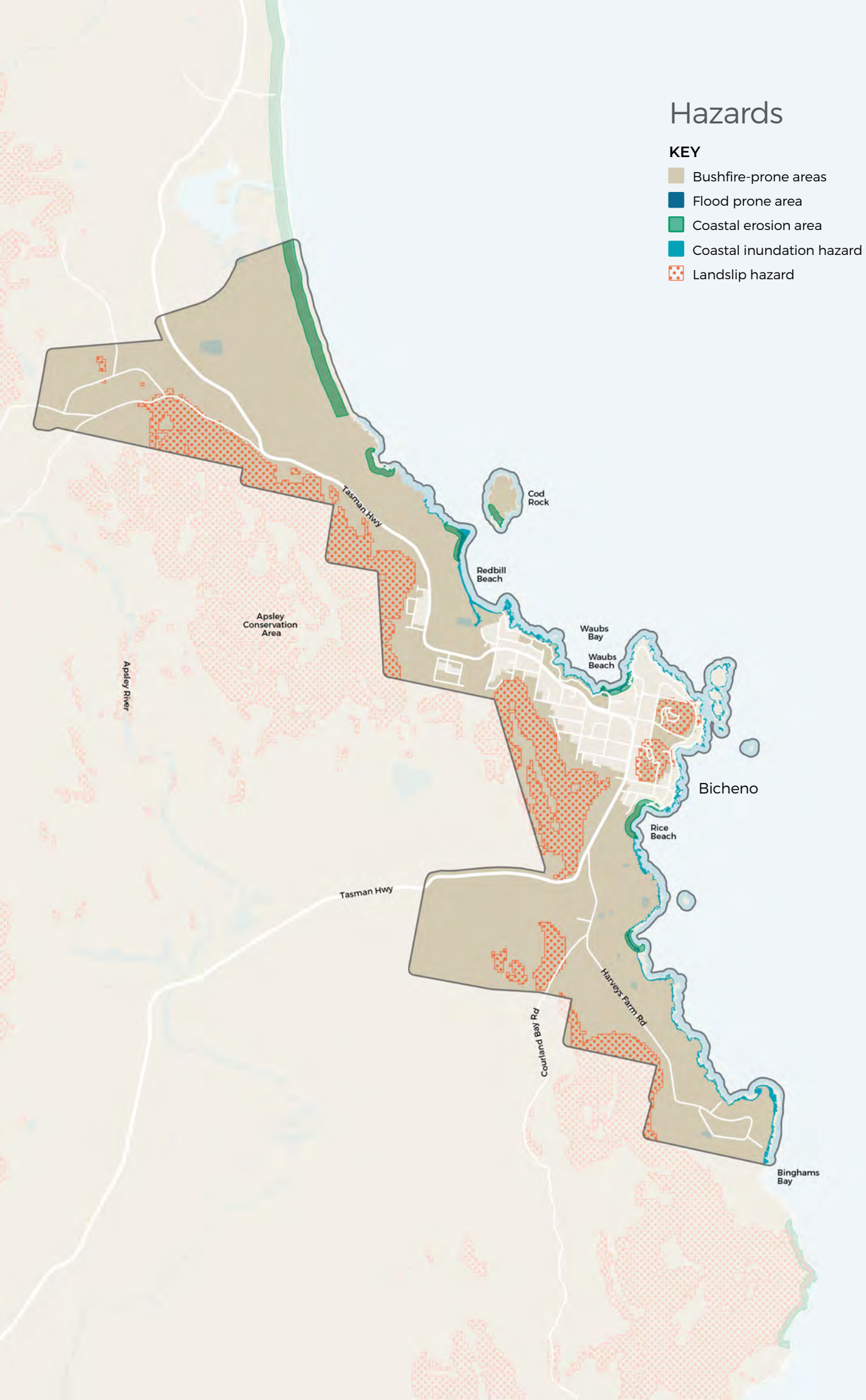
*Percentage of the active labour force, not the entire population.

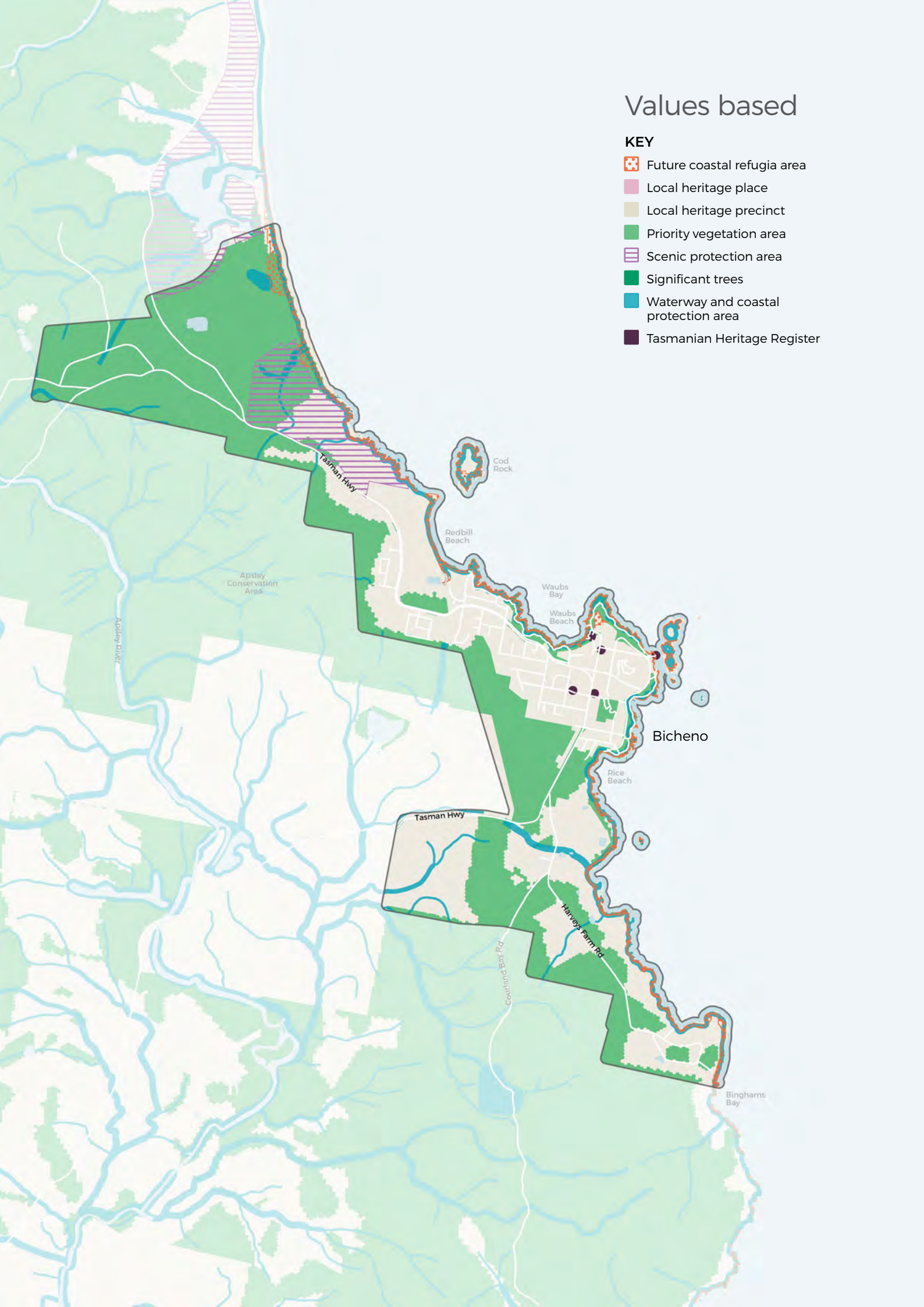
Study area


Tasman Hwy
Cod Rock
Redbill Beach
Apsley Conservation Area
Waubs Bay
Waubs Beach
Apsley River
Bicheno
Rice Beach
Tasman Hwy
Harveys Farm Rd
Courland Bay Rd
Binghams Bay

Existing conditions


Zoning
KEY
Agriculture
Community Purpose
Environmental Management
Future Urban
General Business
General Industrial
General Residential
Landscape Conservation
Light Industrial
Local Business
Low Density Residential
Major Tourism
Open Space
Particular Purpose
Recreation
Rural
Rural Living
Utilities
Village
Tasman Hwy
Cod Rock
Redbill Beach
Waubs Bay
Waubs Beach
Bicheno
Rice Beach
Tasman Hwy
Harveys Farm Rd
Binghams Bay

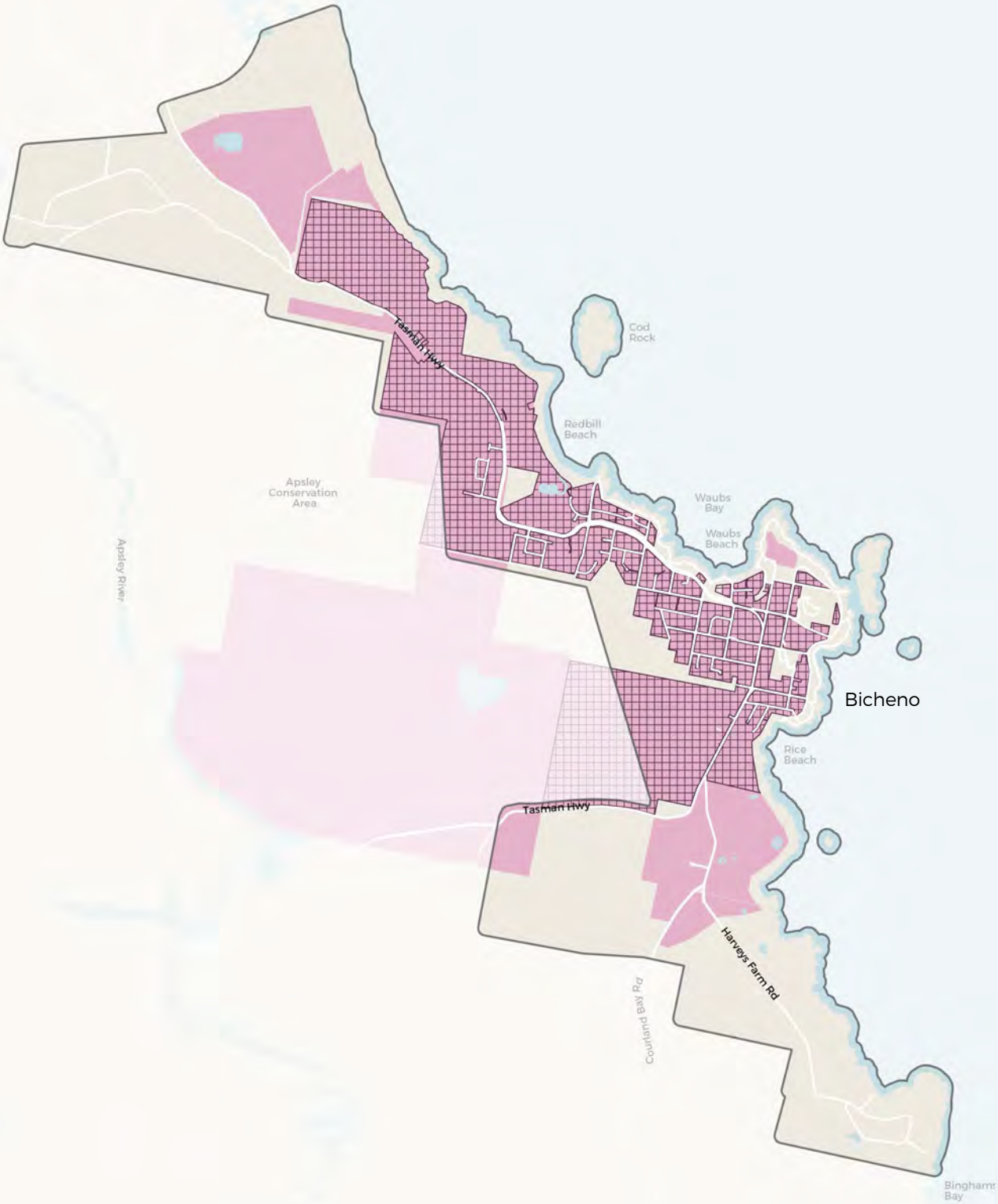

Hazards
KEY
Bushfire-prone areas
Flood prone area
Coastal erosion area
Coastal inundation hazard
Landslip hazard
Cod Rock
Tasman Hwy
Redbill Beach
Apsley Conservation Area
Apsley River
Waubs Bay
Waubs Beach
Bicheno
Rice Beach
Tasman Hwy
Harveys Farm Rd
Courland Bay Rd
Binghams Bay


Values based
KEY
Future coastal refugia area
Local heritage place
Local heritage precinct
Priority vegetation area
Scenic protection area
Significant trees
Waterway and coastal protection area
Tasmanian Heritage Register
Tasman Hwy
Cod Rock
Redbill Beach
Apsley Conservation Area
Apsley River
Waubs Bay
Waubs Beach
Bicheno
Rice Beach
Tasman Hwy
Harveys Farm Rd
Coastard Bay Rd
Binghams Bay

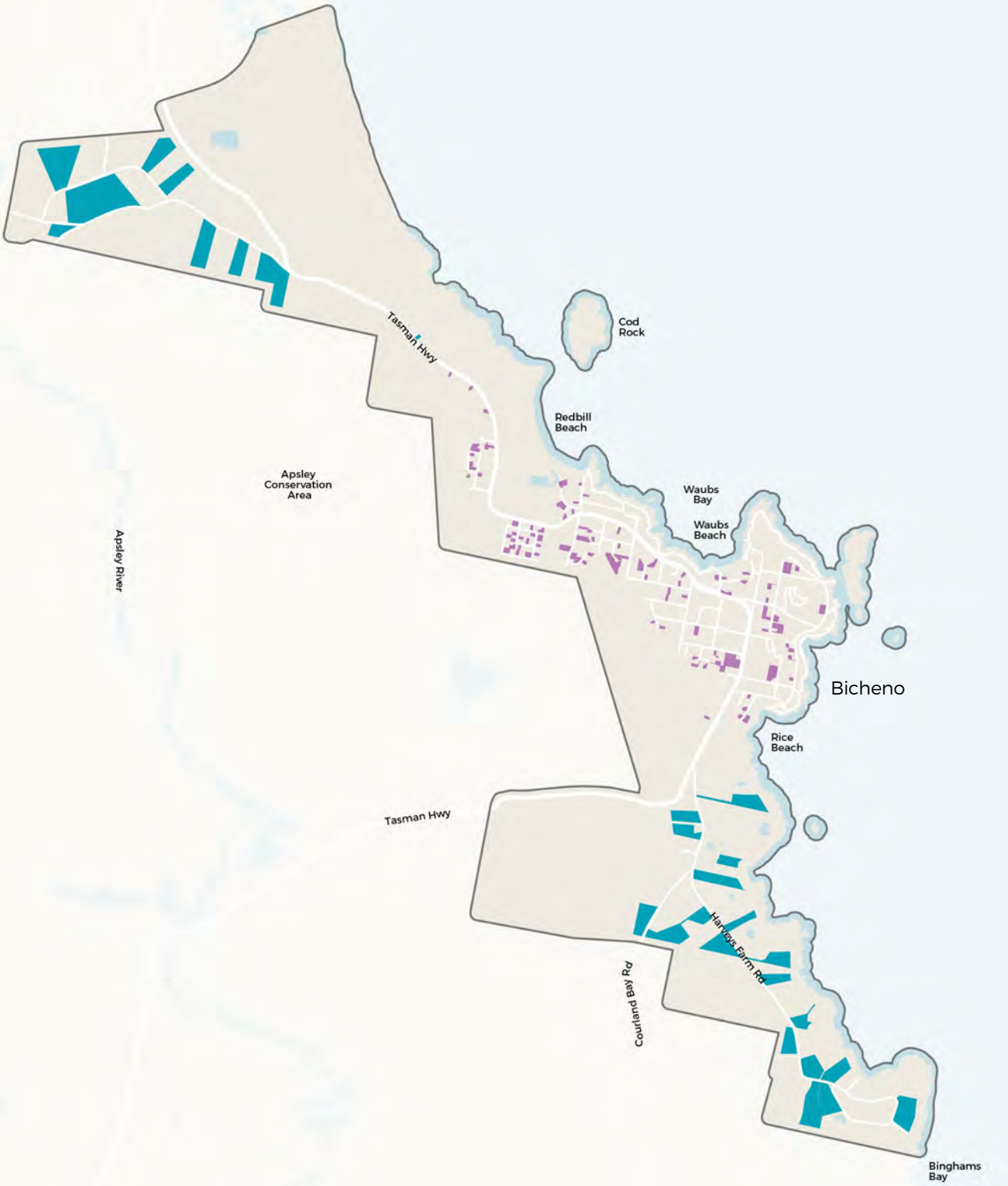
Serviced land

KEY

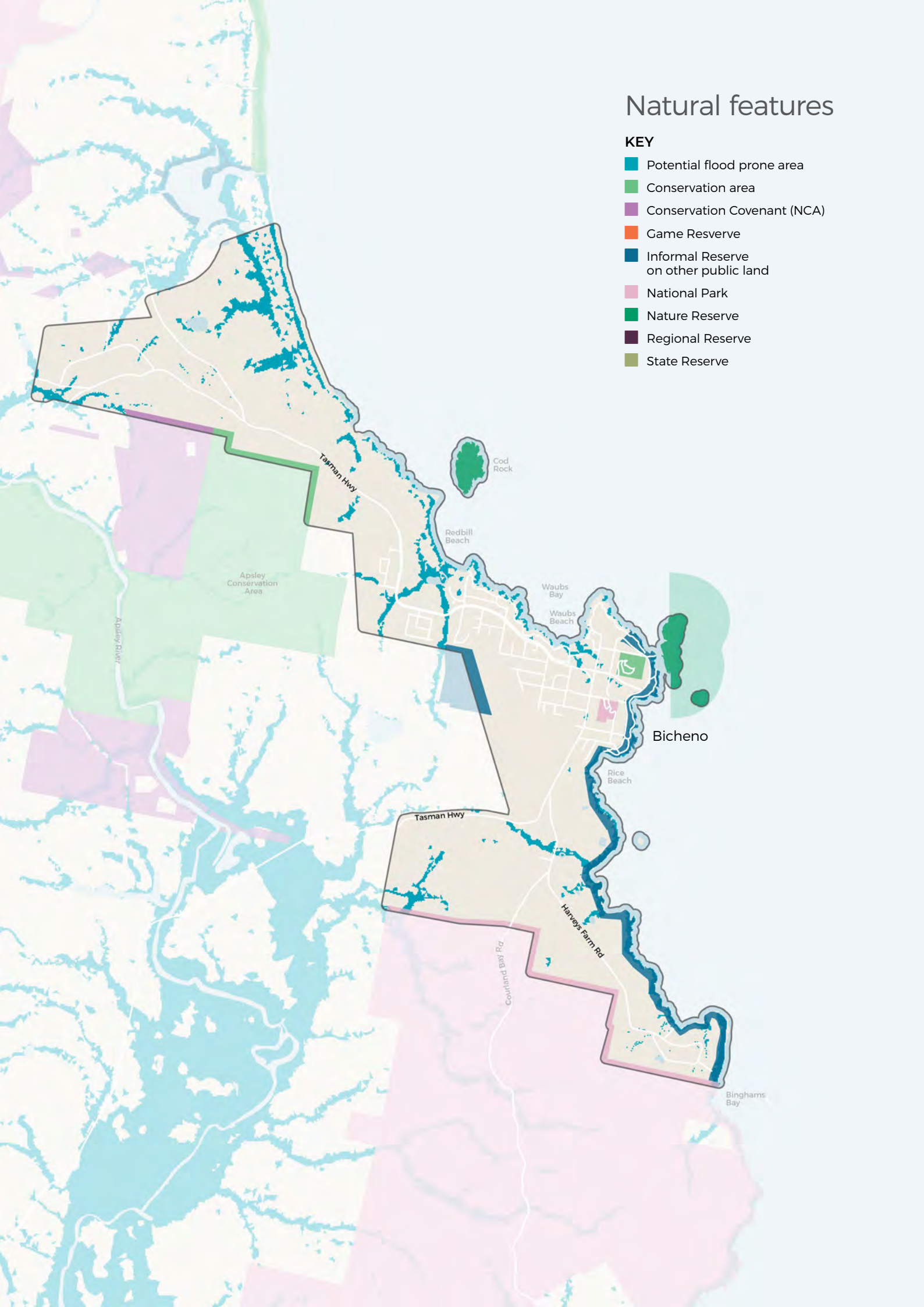
- Sewer serviced land
- Water serviced land



Vacant land


KEY
Rural living
Low density residential
General residential
Tasman Hwy
Cod Rock
Redbill Beach
Apsley Conservation Area
Apsley River
Waubs Bay
Waubs Beach
Bicheno
Rice Beach
Tasman Hwy
Courland Bay Rd
Harveys Farm Rd
Binghams Bay

Natural features



Appendix B Coles Bay profile and maps

Population profile of Coles Bay

Summary of key census statistics for Coles Bay (Australian Bureau of Statistics, 2011, 2016 & 2021)

	Coles Bay[5]			Glamorgan Spring Bay[6]			Greater Hobart[7]	Tasmania[8]
	2011	2016	2021	2011	2016	2021	2021	2021
Population								
Total	305	353	515	4,190	4,400	5,012	247,086	557,569
Female	140	180	245	2,071	2,159	2,436	126,562	283,804
Male	165	176	272	2,119	2,238	2,578	120,521	273,765
Median age								
Median age	49	53	38	53	56	57	39	42
Age profile								
0-4	1.6%	5.2%	3.3%	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	6.6%	5.5%	3.0%	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	8.9%	4.3%	6.6%	6.4%	5.9%	5.9%	11.4%	11%
25-54	36.9%	36.2%	52.2%	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	23.7%	18.7%	10.5%	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	22.3%	30.1%	24.1%	25.9%	29.5%	34.2%	18.8%	20.9%
Employment*								
Worked full time	51.5%	53.7%	48.7%	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	33.7%	34.0%	44.5%	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	3.6%	1.9%	3.4%	7.1%	5.3%	4.8%	6.2%	5.9%
Income								
Median weekly household income	$700	$1,047	$1,354	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$1,322	$1,517	$1,300	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$200	$235	$260	$160	$190	$250	$350	$290

[5] SSC60121 (ABS, 2011), SSC60062 (ABS, 2016) and SAL (ABS, 2021)
[6] LGA62410 (ABS, 2011, 2016, 2021)
[7] 6GHOB (ABS, 2021) ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.
[8] State/Territory 6 (ABS, 2021)

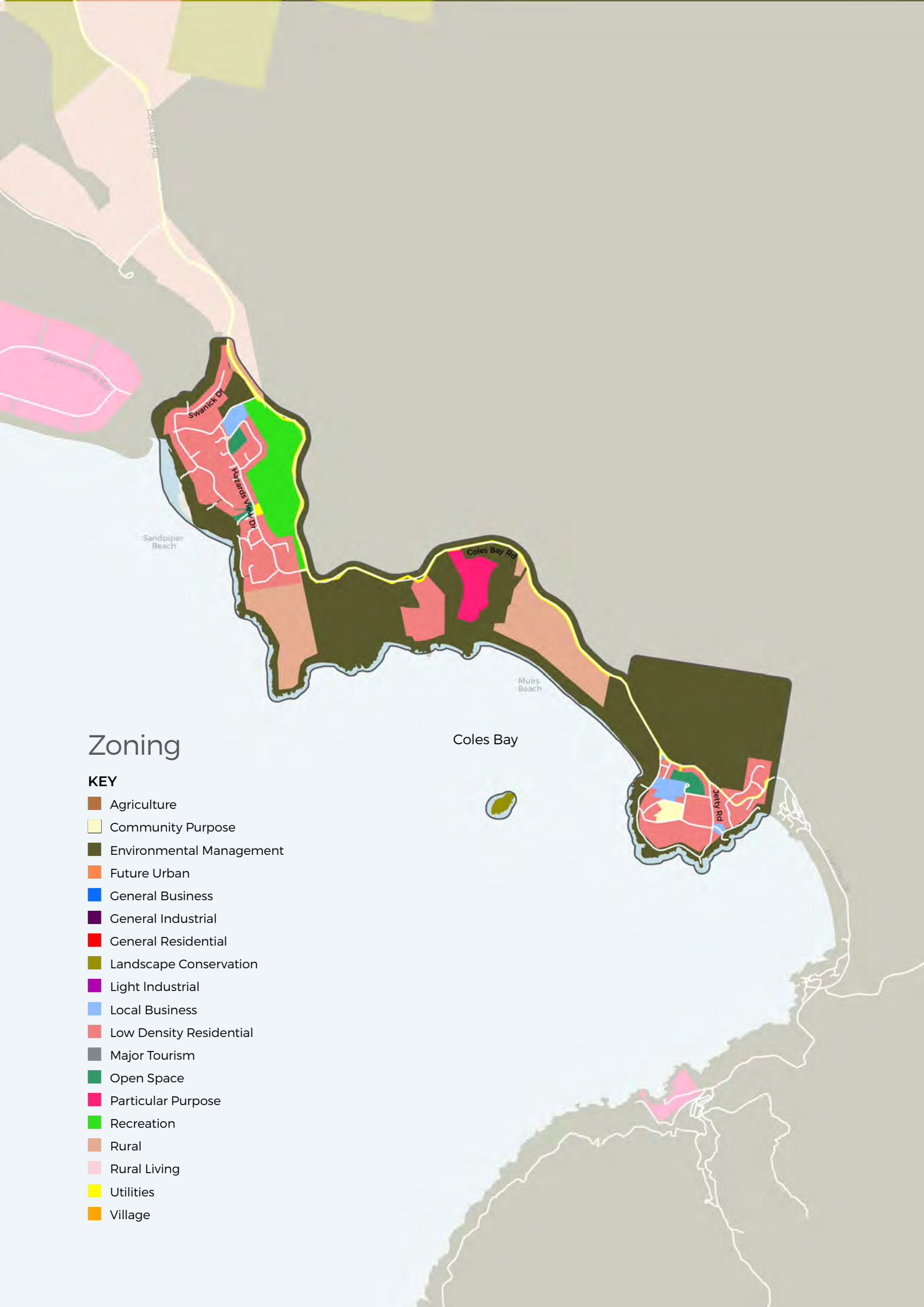
	Coles Bay[5]			Glamorgan Spring Bay[6]			Greater Hobart[7]	Tasmania[8]
	2011	2016	2021	2011	2016	2021	2021	2021
Family structure								
Couple family without children	77.5%	67.6%	70.0%	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	14.1%	28.2%	25.0%	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	8.5%	4.2%	3.0%	10.4%	12.0%	11.0%	18.0%	17.3%
Other	0%	0%	0%	0.5%	0.6%	0.9%	1.6%	1.4%
Household type								
Family household	65.1%	68.0%	60.4%	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	30.2%	23.0%	35.7%	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	4.7%	9.0%	3.9%	2.8%	3.2%	2.4%	4.2%	3.4%
Household size								
Average person per household	2	2	2	2.1	2	2.1	2.4	2.4
Car ownership								
Average motor vehicles per dwelling	2	1.8	1.9	1.9	1.9	2	1.9	1.9

*Percentage of the active labour force, not the entire population.


Coles Bay Rd
Dolphins Sands Rd
Swanick Dr
Hazards View Dr
Sandpiper Beach
Coles Bay Rd
Muirs Beach
Coles Bay
Jetty Rd
Freycinet Dr

Study area

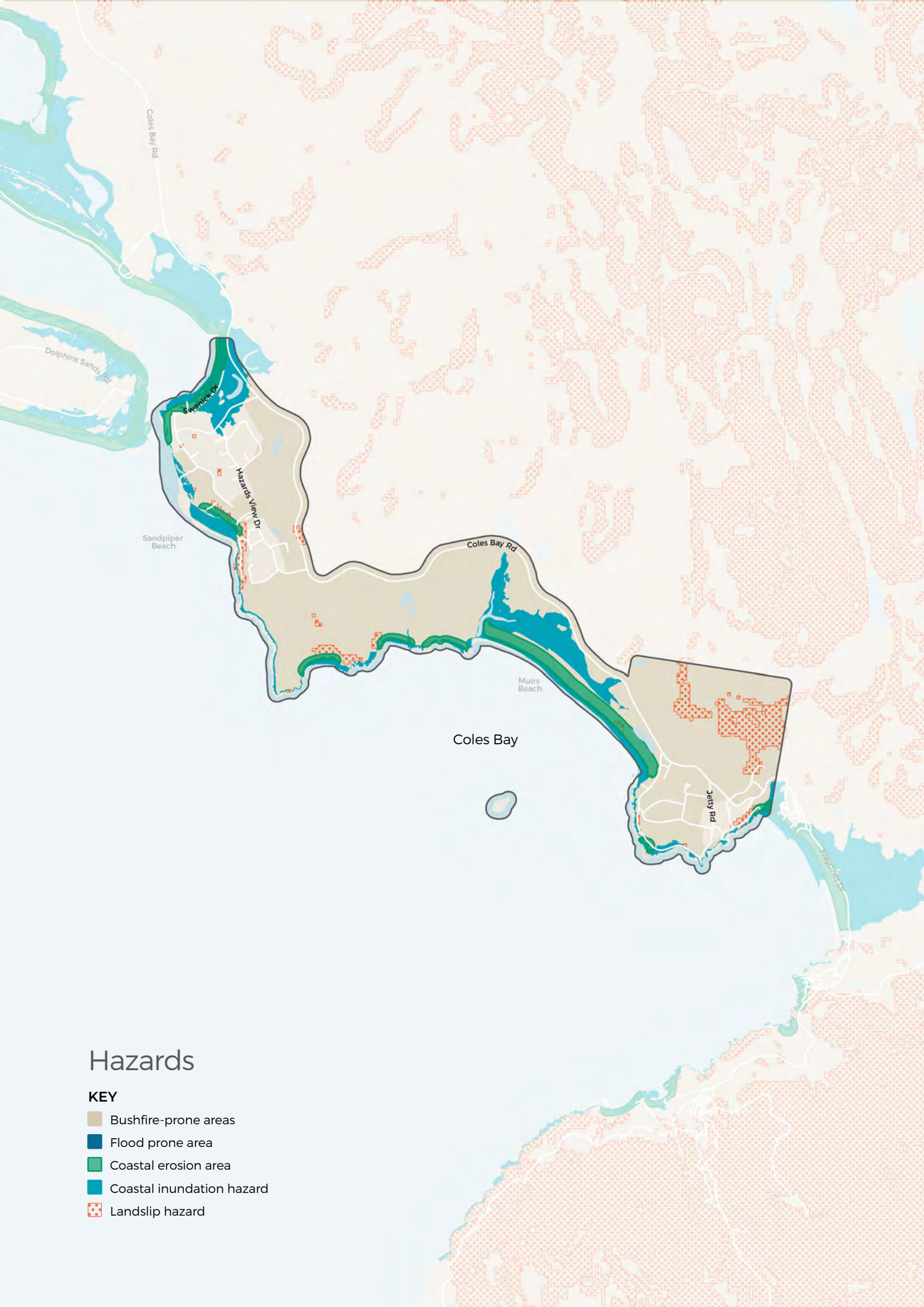
Existing conditions



Zoning

KEY

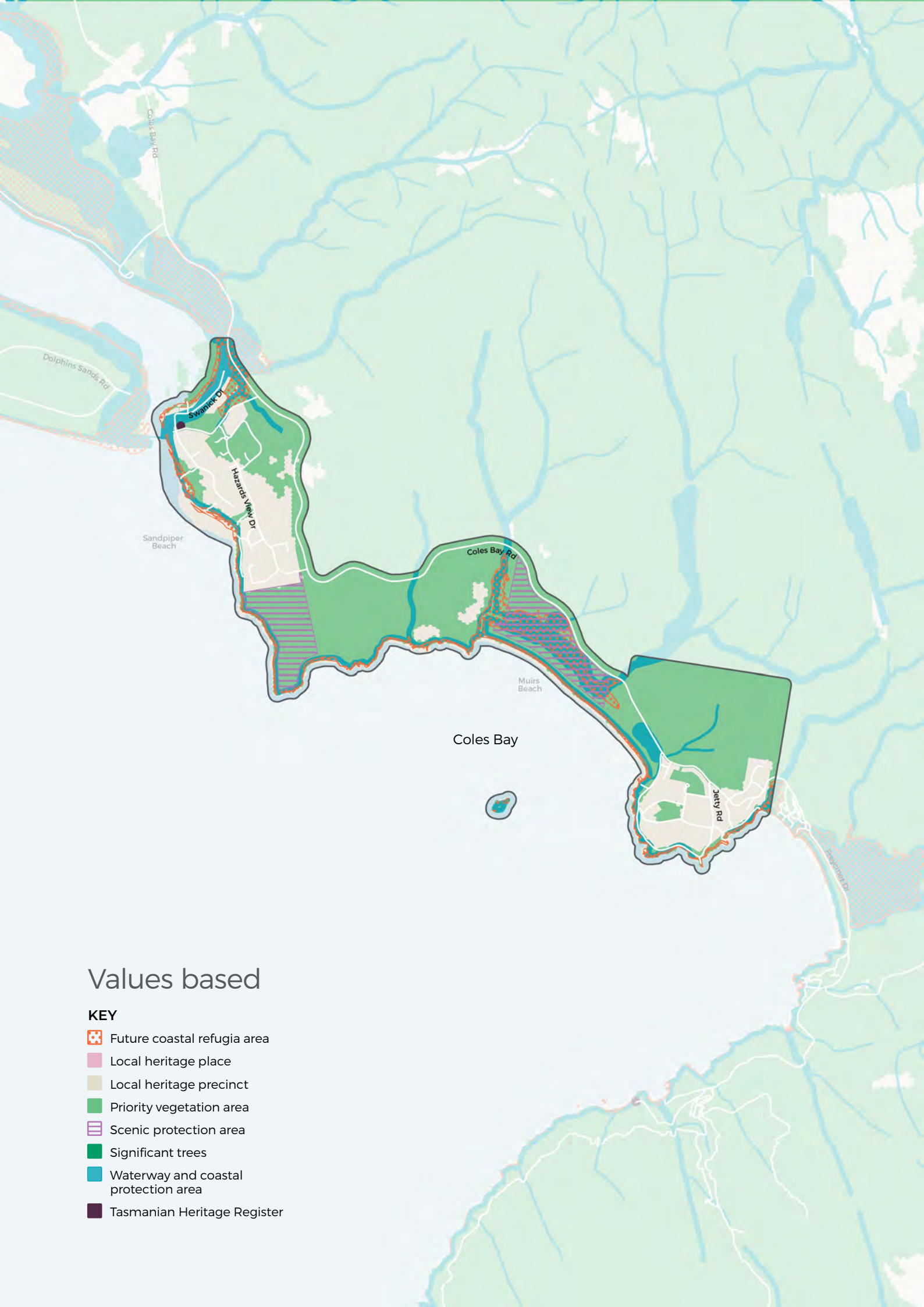
- Agriculture
- Community Purpose
- Environmental Management
- Future Urban
- General Business
- General Industrial
- General Residential
- Landscape Conservation
- Light Industrial
- Local Business
- Low Density Residential
- Major Tourism
- Open Space
- Particular Purpose
- Recreation
- Rural
- Rural Living
- Utilities
- Village



Hazards

KEY

- Bushfire-prone areas
- Flood prone area
- Coastal erosion area
- Coastal inundation hazard
- Landslip hazard



Values based

KEY

- Future coastal refugia area
- Local heritage place
- Local heritage precinct
- Priority vegetation area
- Scenic protection area
- Significant trees
- Waterway and coastal protection area
- Tasmanian Heritage Register

Serviced land

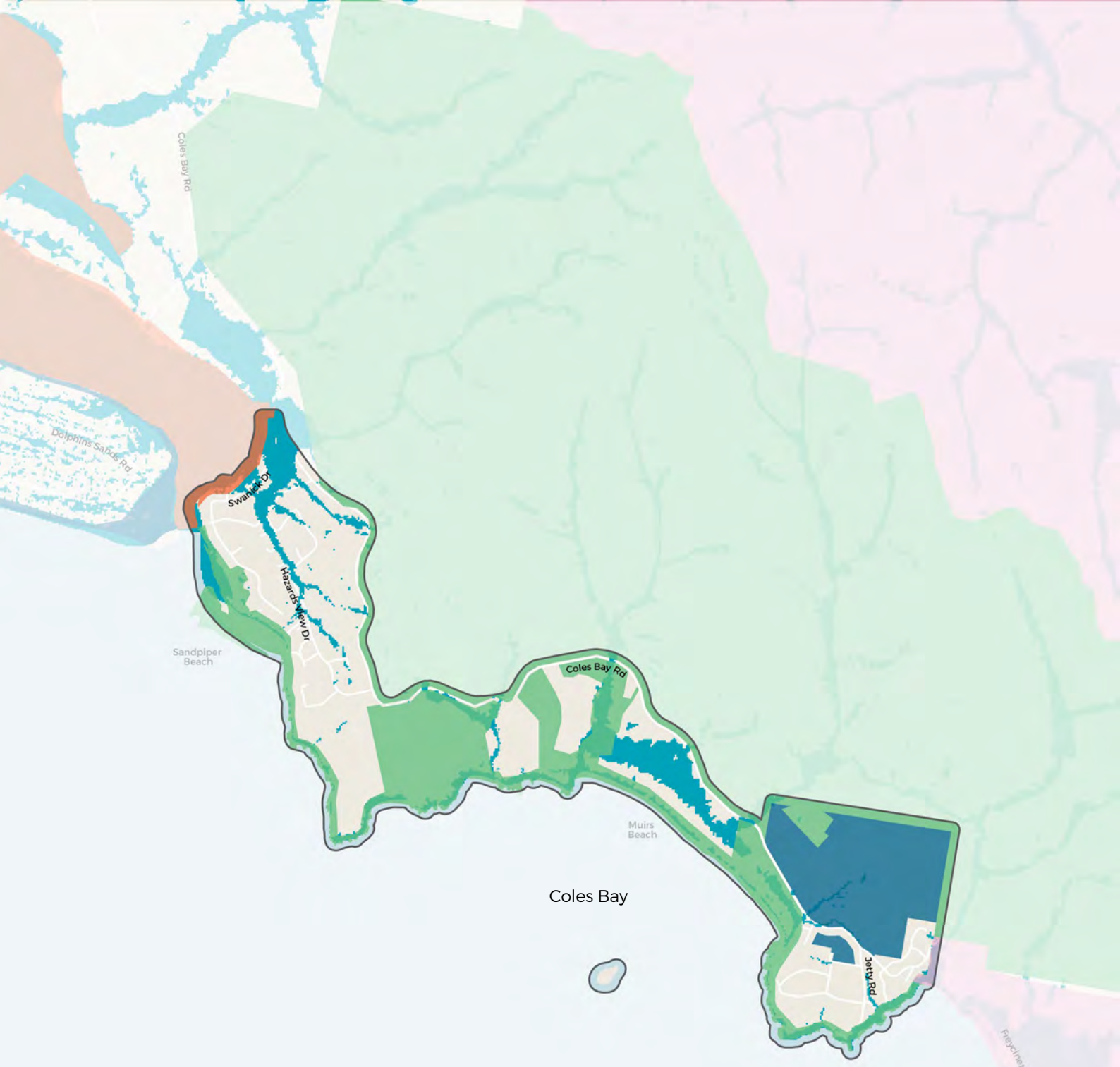
KEY

- Sewer serviced land
- Water serviced land

Vacant land

KEY

- Rural living
- Low density residential
- General residential



Natural features

KEY

- Potential flood prone area
- Conservation area
- Conservation Covenant (NCA)
- Game Resverve
- Informal Reserve on other public land
- National Park
- Nature Reserve
- Regional Reserve
- State Reserve

Appendix C Swansea profile and maps

Population profile of Swansea

Summary of key census statistics for Swansea (Australian Bureau of Statistics, 2011, 2016 & 2021)

	Swansea[9]			Glamorgan Spring Bay[10]			Greater Hobart[11]	Tasmania[12]
	2011	2016	2021	2011	2016	2021	2021	2021
Population								
Total	597	645	711	4,190	4,400	5,012	247,086	557,569
Female	328	338	364	2,071	2,159	2,436	126,562	283,804
Male	269	307	346	2,119	2,238	2,578	120,521	273,765
Median age								
Median age	60	64	63	53	56	57	39	42
Age profile								
0-4	2.7%	2.2%	2.9%	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	5.9%	5.3%	4.2%	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	5.0%	4.4%	4.5%	6.4%	5.9%	5.9%	11.4%	11%
25-54	23.5%	24.8%	23.1%	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	20.7%	20.5%	19.8%	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	42.4%	46.6%	45.3%	25.9%	29.5%	34.2%	18.8%	20.9%
Employment*								
Worked full time	51.7%	47.8%	39.4%	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	35.1%	38.5%	42.7%	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	3.9%	5.8%	4.7%	7.1%	5.3%	4.8%	6.2%	5.9%
Income								
Median weekly household income	$678	$797	$913	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$1,050	$1,203	$1,079	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$200	$200	$240	$160	$190	$250	$350	$290

[9] UCL621030 (ABS, 2011, 2016, 2021)
[10] LGA62410 (ABS, 2011, 2016, 2021)
[11] 6GHOB (ABS, 2021) ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.
[12] State/Territory 6 (ABS, 2021)

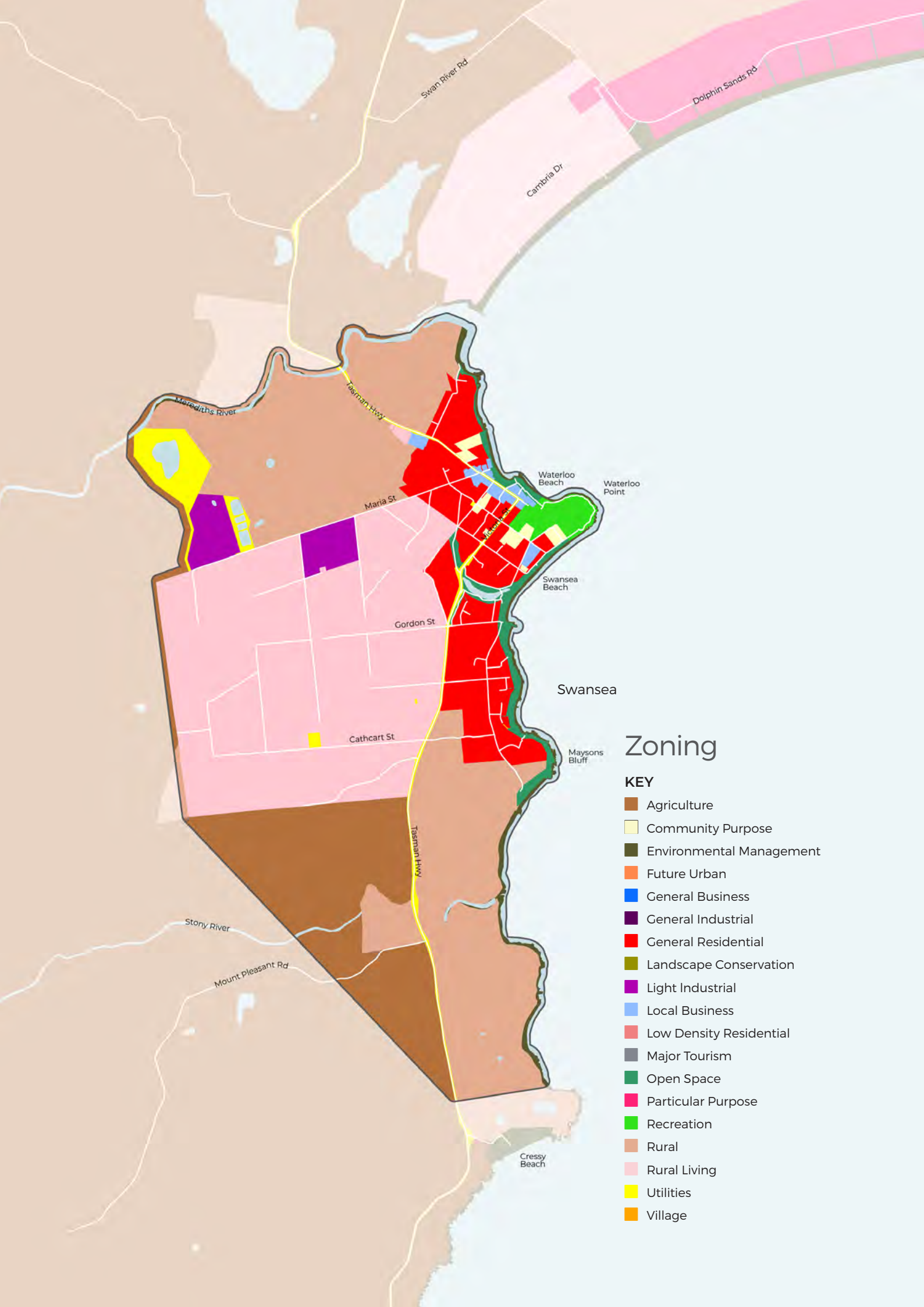
	Swansea[9]			Glamorgan Spring Bay[10]			Greater Hobart[11]	Tasmania[12]
	2011	2016	2021	2011	2016	2021	2021	2021
Family structure								
Couple family without children	62.9%	69.0%	72.9%	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	27.2%	19.0%	14.6%	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	7.9%	12.0%	10.1%	10.4%	12.0%	11.0%	18.0%	17.3%
Other	2.0%	0%	0%	0.5%	0.6%	0.9%	1.6%	1.4%
Household type								
Family household	59.8%	58.8%	62.4%	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	39.0%	36.8%	34.2%	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	1.2%	4.3%	3.4%	2.8%	3.2%	2.4%	4.2%	3.4%
Household size								
Average person per household	1.9	1.9	1.9	2.1	2	2.1	2.4	2.4
Car ownership								
Average motor vehicles per dwelling	1.6	1.7	1.8	1.9	1.9	2	1.9	1.9

*Percentage of the active labour force, not the entire population.


Swan River Rd
Dolphin Sands Rd
Cambria Dr
Tasman Hwy
Merediths River
Waterloo Beach
Waterloo Point
Maria St
Victoria St
Swansea Beach
Gordon St
Swansea
Cathcart St
Maysons Bluff
Tasman Hwy
Stony River
Mount Pleasant Rd
Cressy Beach

Study areas

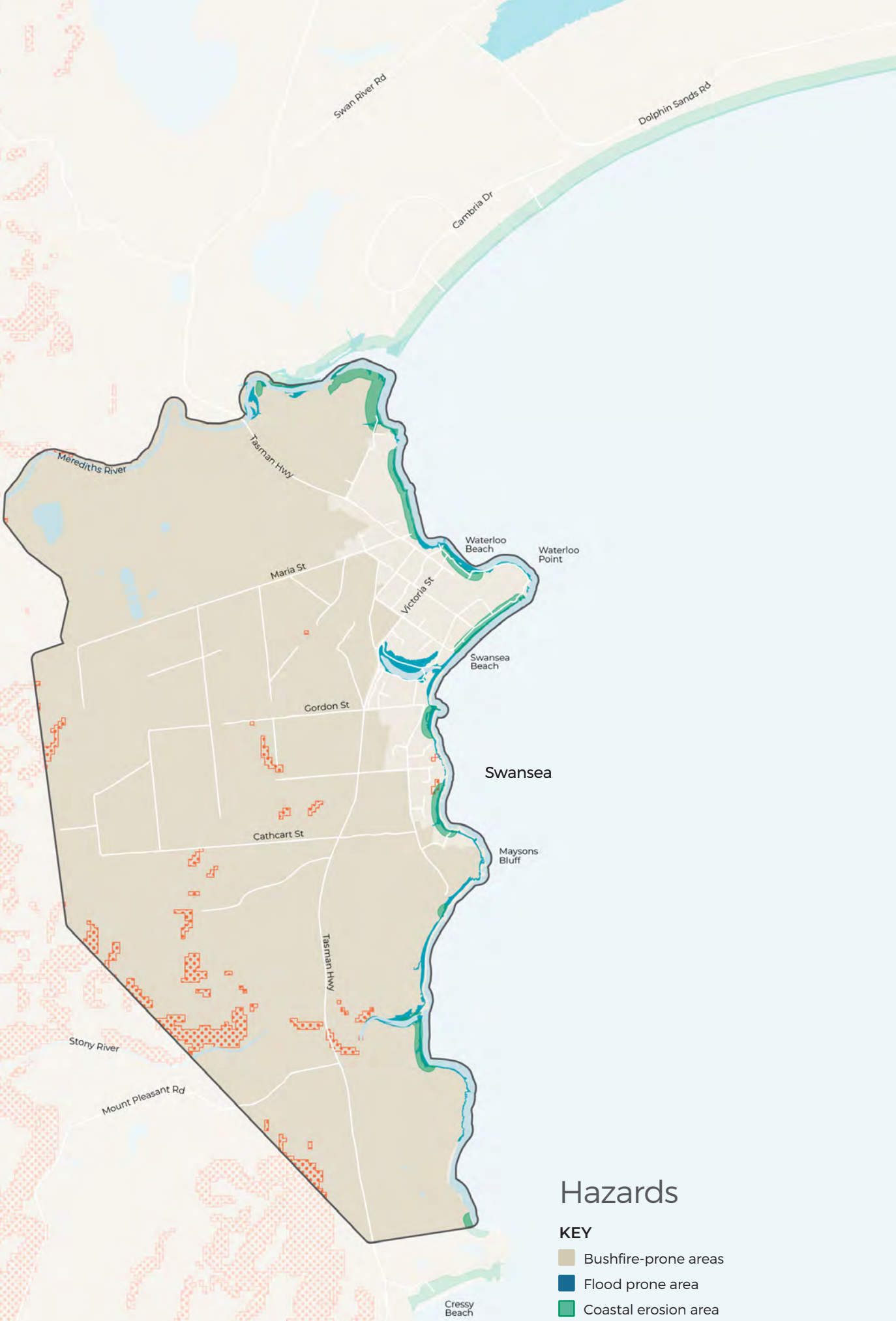
Existing conditions



Zoning

KEY

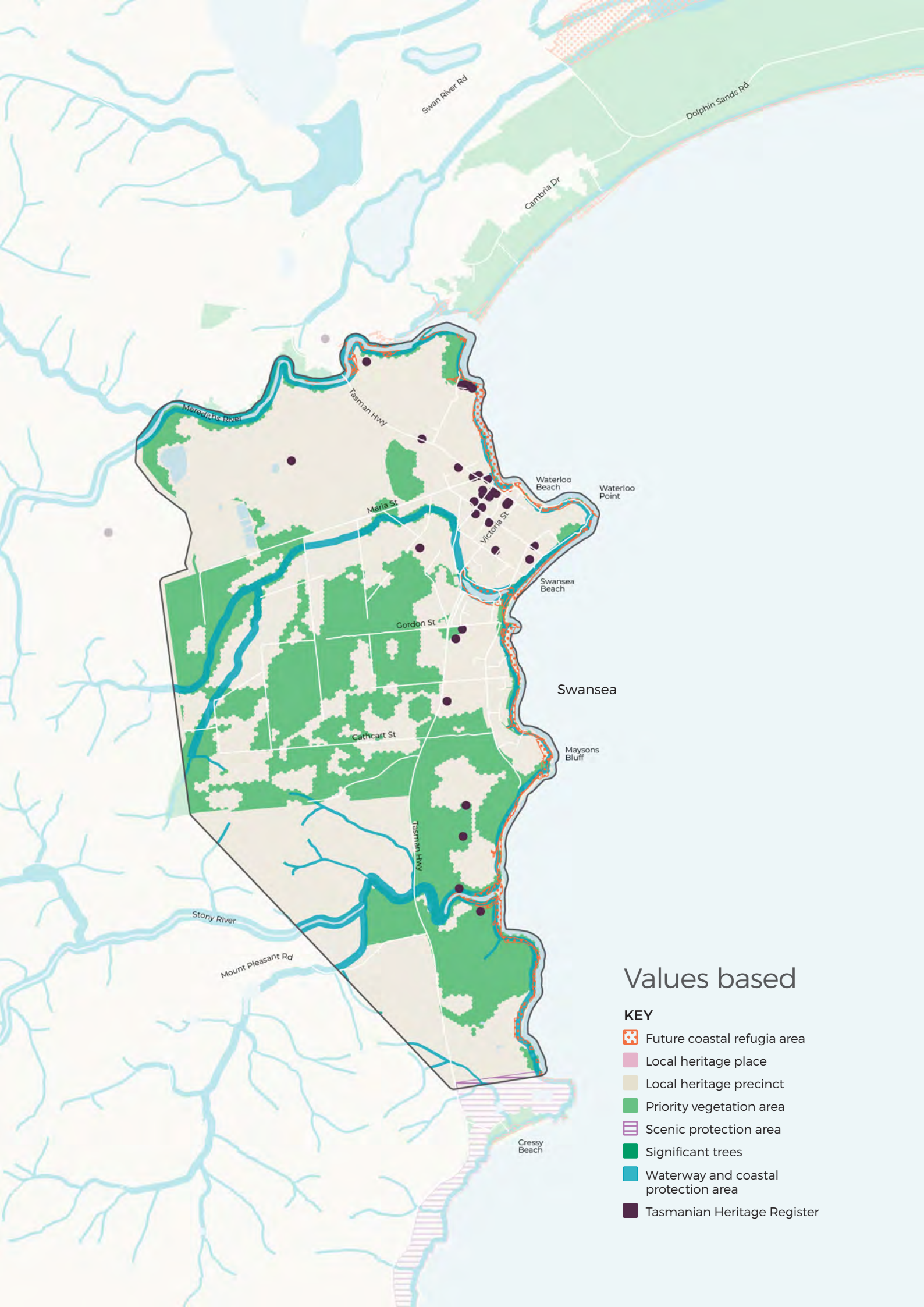
- Agriculture
- Community Purpose
- Environmental Management
- Future Urban
- General Business
- General Industrial
- General Residential
- Landscape Conservation
- Light Industrial
- Local Business
- Low Density Residential
- Major Tourism
- Open Space
- Particular Purpose
- Recreation
- Rural
- Rural Living
- Utilities
- Village



Hazards

KEY

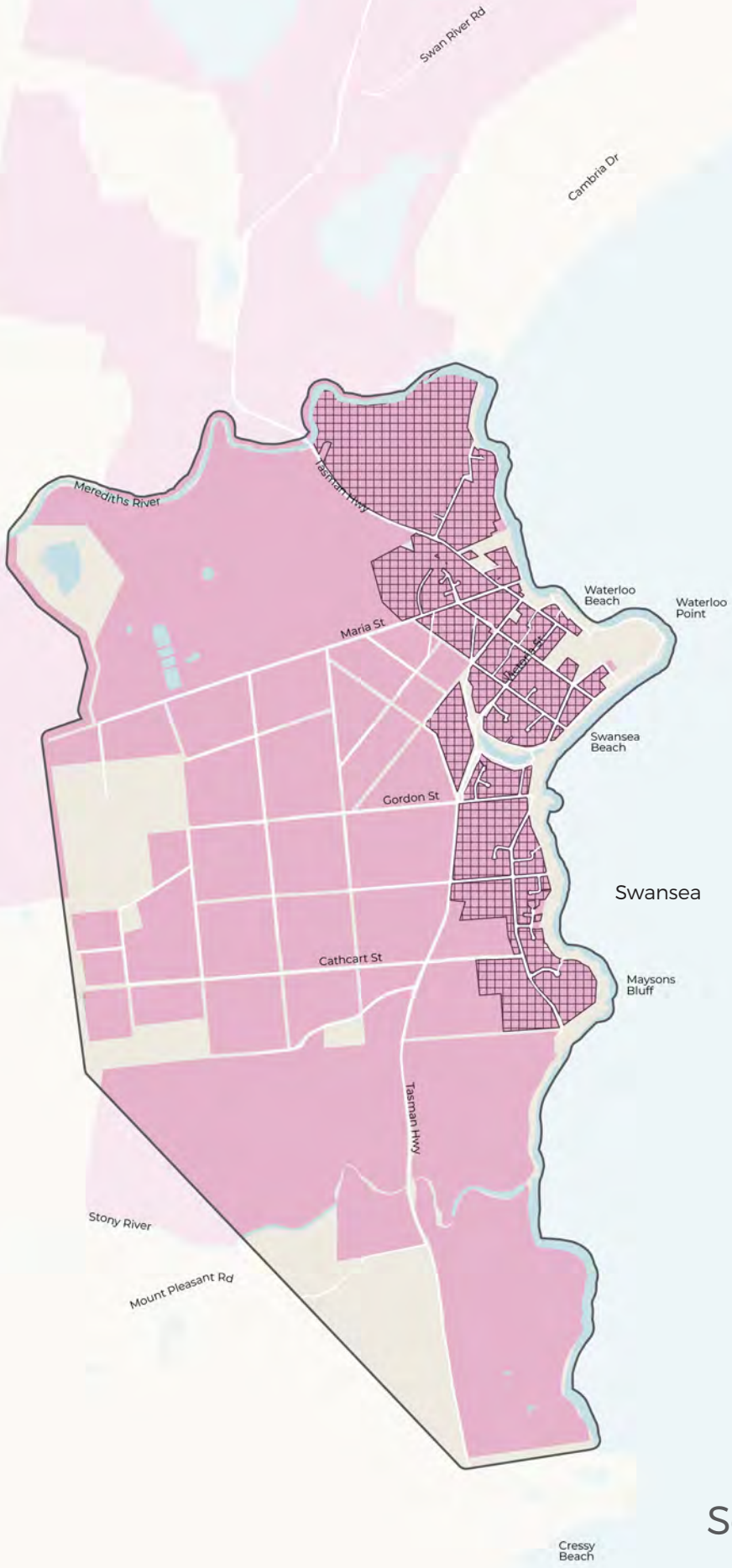
- Bushfire-prone areas
- Flood prone area
- Coastal erosion area
- Coastal inundation hazard
- Landslip hazard



Values based

KEY

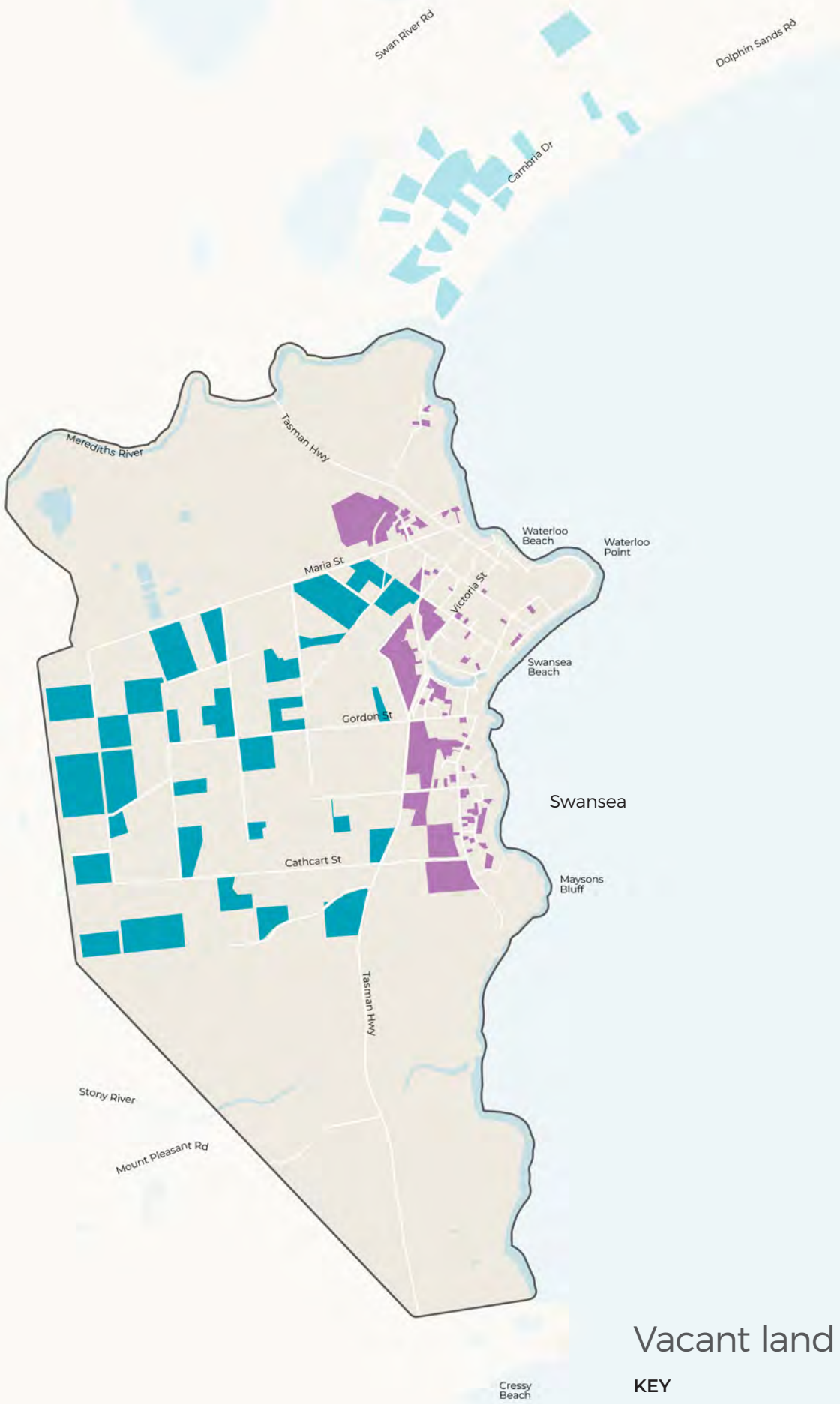
- Future coastal refugia area
- Local heritage place
- Local heritage precinct
- Priority vegetation area
- Scenic protection area
- Significant trees
- Waterway and coastal protection area
- Tasmanian Heritage Register



Serviced land

KEY

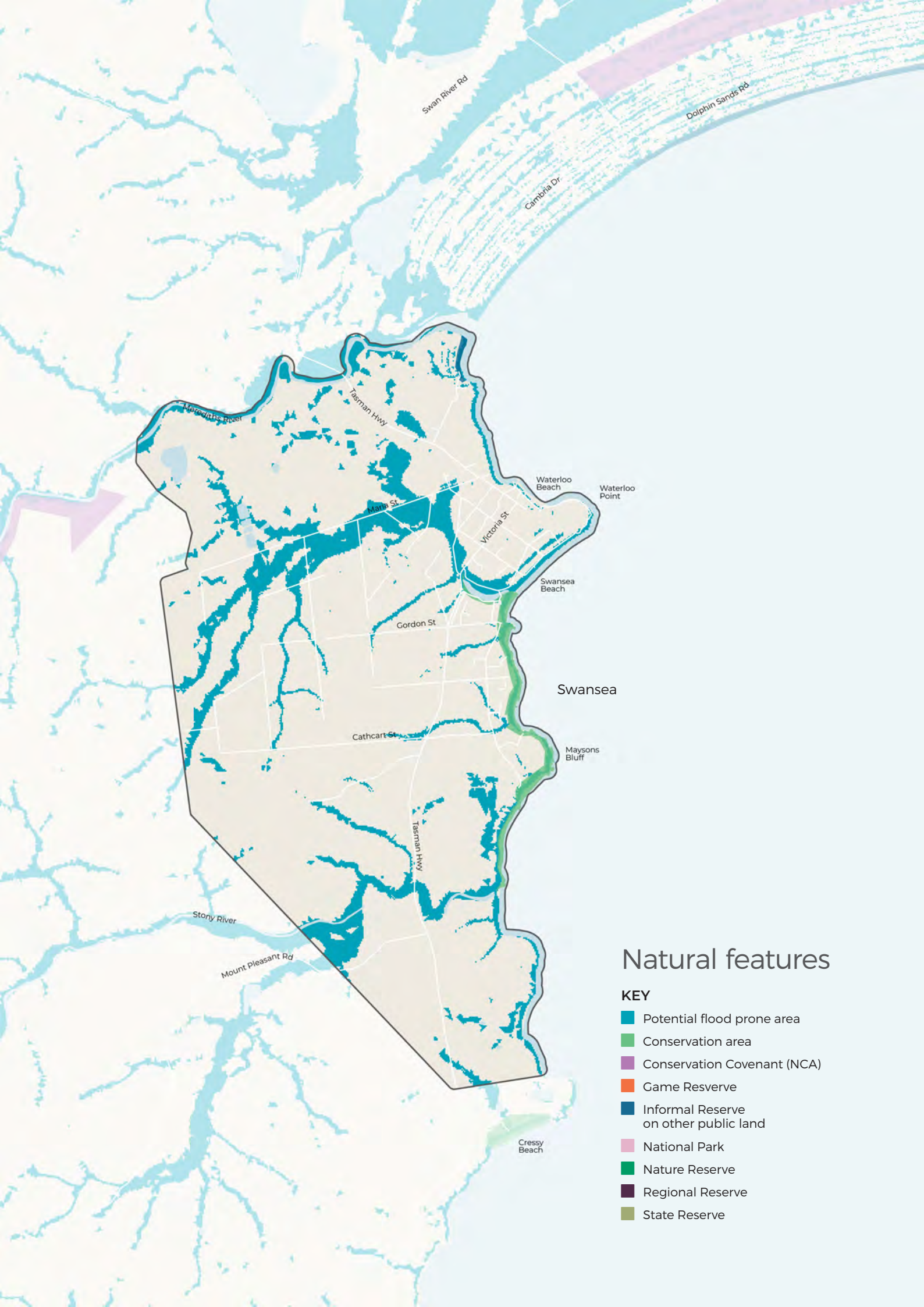
- Sewer serviced land
- Water serviced land



Vacant land

KEY

- Rural living
- Low density residential
- General residential



Natural features

KEY

- Potential flood prone area
- Conservation area
- Conservation Covenant (NCA)
- Game Resverve
- Informal Reserve on other public land
- National Park
- Nature Reserve
- Regional Reserve
- State Reserve

Appendix D Orford-Triabunna profile and maps

Population profile of Orford

Summary of key census statistics for Orford (Australian Bureau of Statistics, 2011, 2016 & 2021)

	Orford[13]			Glamorgan Spring Bay[14]			Greater Hobart[15]	Tasmania[16]
	2011	2016	2021	2011	2016	2021	2021	2021
Population								
Total	518	537	623	4,190	4,400	5,012	247,086	557,569
Female	262	262	306	2,071	2,159	2,436	126,562	283,804
Male	256	274	317	2,119	2,238	2,578	120,521	273,765
Median age								
Median age	57	59	62	53	56	57	39	42
Age profile								
0-4	6.6%	1.8%	1.8%	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	8.1%	10.1%	6.8%	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	5.2%	3.7%	4.7%	6.4%	5.9%	5.9%	11.4%	11%
25-54	28.3%	25.4%	24.0%	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	20.5%	20.7%	21.0%	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	31.4%	38.4%	41.9%	25.9%	29.5%	34.2%	18.8%	20.9%
Employment*								
Worked full time	43.9%	49.0%	45.8%	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	40.4%	39.8%	39.2%	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	11.1%	6.3%	7.9%	7.1%	5.3%	4.8%	6.2%	5.9%
Income								
Median weekly household income	$805	$937	$1,108	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$1,300	$1,500	$1,408	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$200	$200	$250	$160	$190	$250	$350	$290

[13] UCL621015 (ABS, 2011) and UCL621019 (ABS, 2016, 2021)
[14] LGA62410 (ABS, 2011, 2016, 2021)
[15] 6GHOB (ABS, 2021) ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.
[16] State/Territory 6 (ABS, 2021)

	Orford[13]			Glamorgan Spring Bay[14]			Greater Hobart[15]	Tasmania[16]
	2011	2016	2021	2011	2016	2021	2021	2021
Family structure								
Couple family without children	67.6	69.1	75.3	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	20.9	17.3	22.4	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	11.5%	11.7%	5.9%	10.4%	12.0%	11.0%	18.0%	17.3%
Other	0%	1.9%	0%	0.5%	0.6%	0.9%	1.6%	1.4%
Household type								
Family household	67.0%	65.6%	64.7%	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	30.7%	33.2%	33.8%	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	2.3%	1.2%	1.5%	2.8%	3.2%	2.4%	4.2%	3.4%
Household size								
Average person per household	2.1	1.9	1.9	2.1	2	2.1	2.4	2.4
Car ownership								
Average motor vehicles per dwelling	1.8	1.8	2	1.9	1.9	2	1.9	1.9

*Percentage of the active labour force, not the entire population.

Population profile of Triabunna

Summary of key census statistics for Triabunna (Australian Bureau of Statistics, 2011, 2016 & 2021)

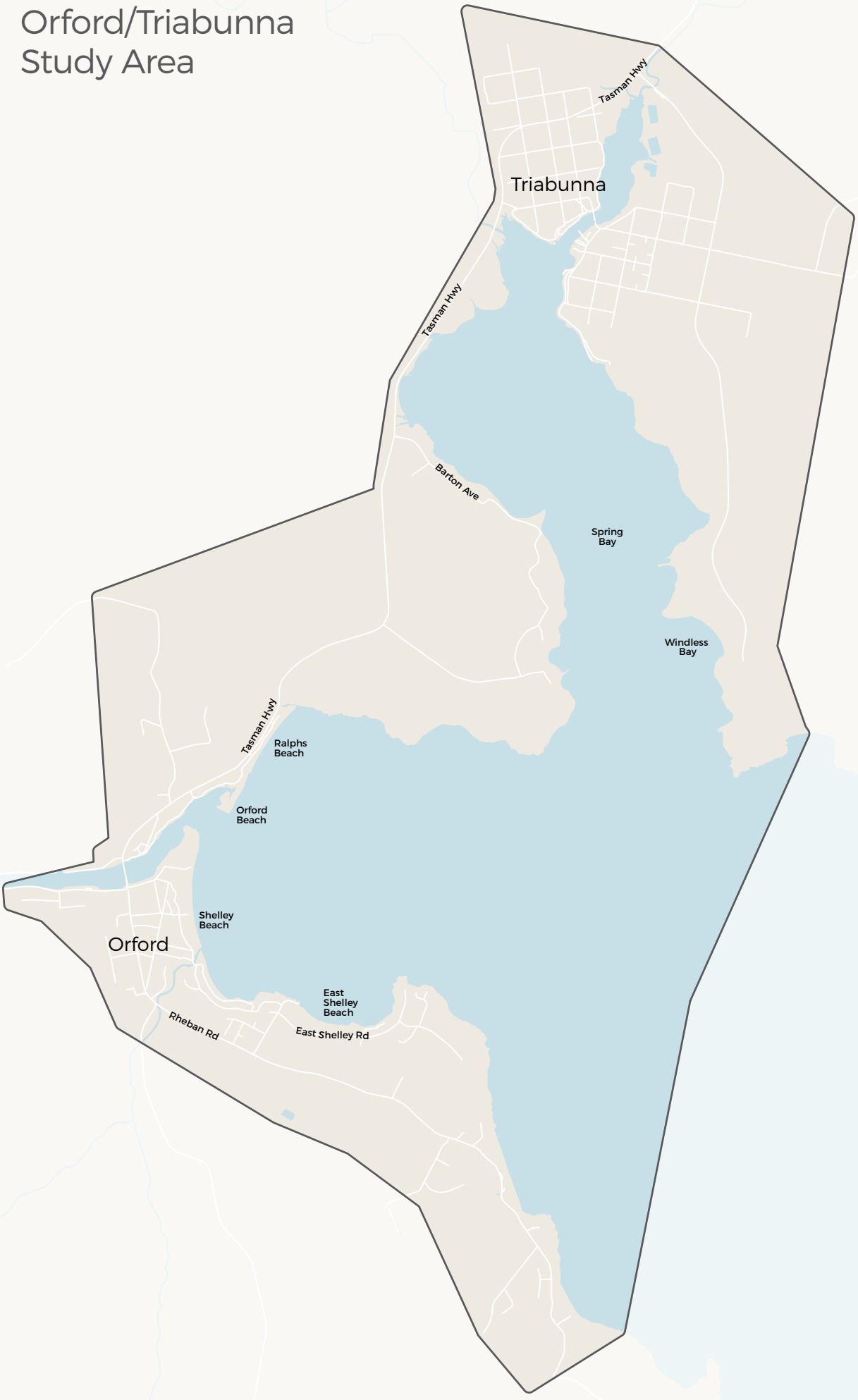
	Triabunna[17]			Glamorgan Spring Bay[18]			Greater Hobart[19]	Tasmania[20]
	2011	2016	2021	2011	2016	2021	2021	2021
Population								
Total	766	749	722	4,190	4,400	5,012	247,086	557,569
Female	375	370	344	2,071	2,159	2,436	126,562	283,804
Male	391	378	379	2,119	2,238	2,578	120,521	273,765
Median age								
Median age	42	46	49	53	56	57	39	42
Age profile								
0-4	5.7%	5.2%	3.7%	4.6%	3.5%	3.1%	5.2%	5.1%
5-14	14.6%	12.9%	10.0%	9.6%	8.7%	6.8%	11.6%	11.6%
15-24	10.3%	11.2%	10.6%	6.4%	5.9%	5.9%	11.4%	11%
25-54	35.5%	31.9%	31.2%	32.5%	29.5%	30.8%	40.9%	38.1%
55-64	15.5%	12.7%	15.1%	10.4%	21.0%	19.4%	12.1%	13.5%
65 and over	18.4%	26.1%	29.4%	25.9%	29.5%	34.2%	18.8%	20.9%
Employment*								
Worked full time	44.7%	46.4%	49.5%	47.2%	46.9%	46.9%	51.5%	51.6%
Worked part time	33.8%	36.6%	38.8%	37.5%	38.5%	40.3%	36.8%	36.4%
Unemployed	12.4%	6.2%	6.6%	7.1%	5.3%	4.8%	6.2%	5.9%
Income								
Median weekly household income	$675	$789	$906	$753	$854	$1,005	$1,542	$1,358
Median monthly mortgage repayments	$952	$867	$946	$1,096	$1,083	$1,103	$1,517	$1,313
Median weekly rent	$170	$180	$240	$160	$190	$250	$350	$290

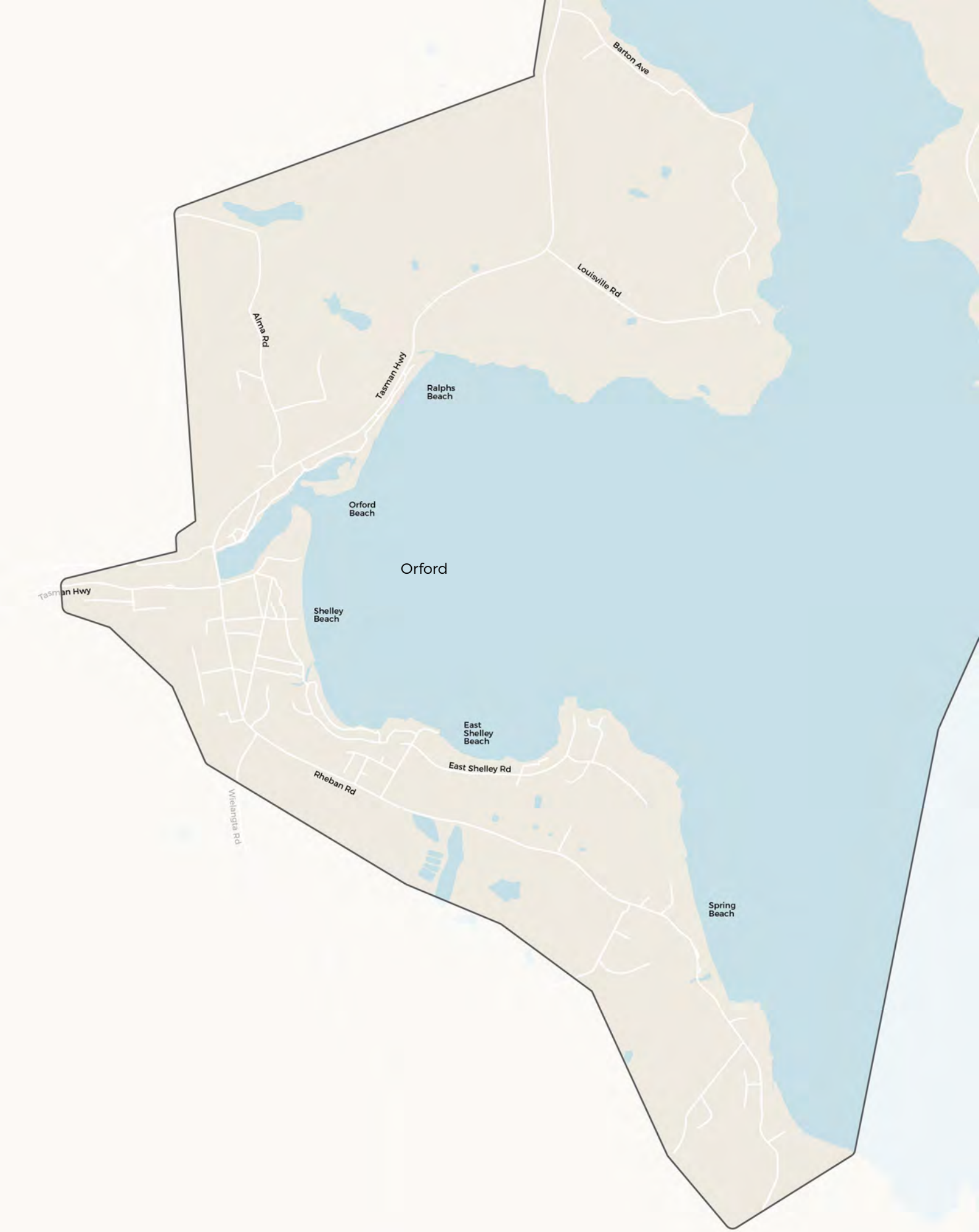
[17] UCL621029 (ABS, 2011), UCL621027 (ABS, 2016), and UCL621031 (ABS, 2011, 2016, 2021)
[18] LGA62410 (ABS, 2011, 2016, 2021)
[19] 6GHOB (ABS, 2021) ABS Greater Capital City Statistical Area does not include Glamorgan Spring Bay.
[20] State/Territory 6 (ABS, 2021)

	Triabunna[17]			Glamorgan Spring Bay[18]			Greater Hobart[19]	Tasmania[20]
	2011	2016	2021	2011	2016	2021	2021	2021
Family structure								
Couple family without children	42.2%	46.5%	47.8%	60.5%	62.7%	68.4%	41.6%	44.5%
Couple family with children	39.3%	36.1%	25.8%	28.6%	24.7%	23.6%	38.8%	36.8%
One parent family	15.6%	17.3%	26.3%	10.4%	12.0%	11.0%	18.0%	17.3%
Other	2.8%	0%	1.4%	0.5%	0.6%	0.9%	1.6%	1.4%
Household type								
Family household	68.3%	62.1%	65.2%	66.4%	64.4%	66.3%	68.1%	67.6%
Single (or lone) person household	29.7%	33.5%	32.3%	30.9%	32.5%	31.2%	27.7%	29.0%
Group household	2.0%	4.3%	2.6%	2.8%	3.2%	2.4%	4.2%	3.4%
Household size								
Average person per household	2.4	2.2	2.2	2.1	2	2.1	2.4	2.4
Car ownership								
Average motor vehicles per dwelling	1.7	1.8	2	1.9	1.9	2	1.9	1.9

*Percentage of the active labour force, not the entire population.

Orford/Triabunna Study Area

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Louisville Rd
Alma Rd
Tasman Hwy
Ralphs Beach
Orford Beach
Orford
Tasman Hwy
Shelley Beach
East Shelley Beach
East Shelley Rd
Rheban Rd
Wielangta Rd
Spring Beach

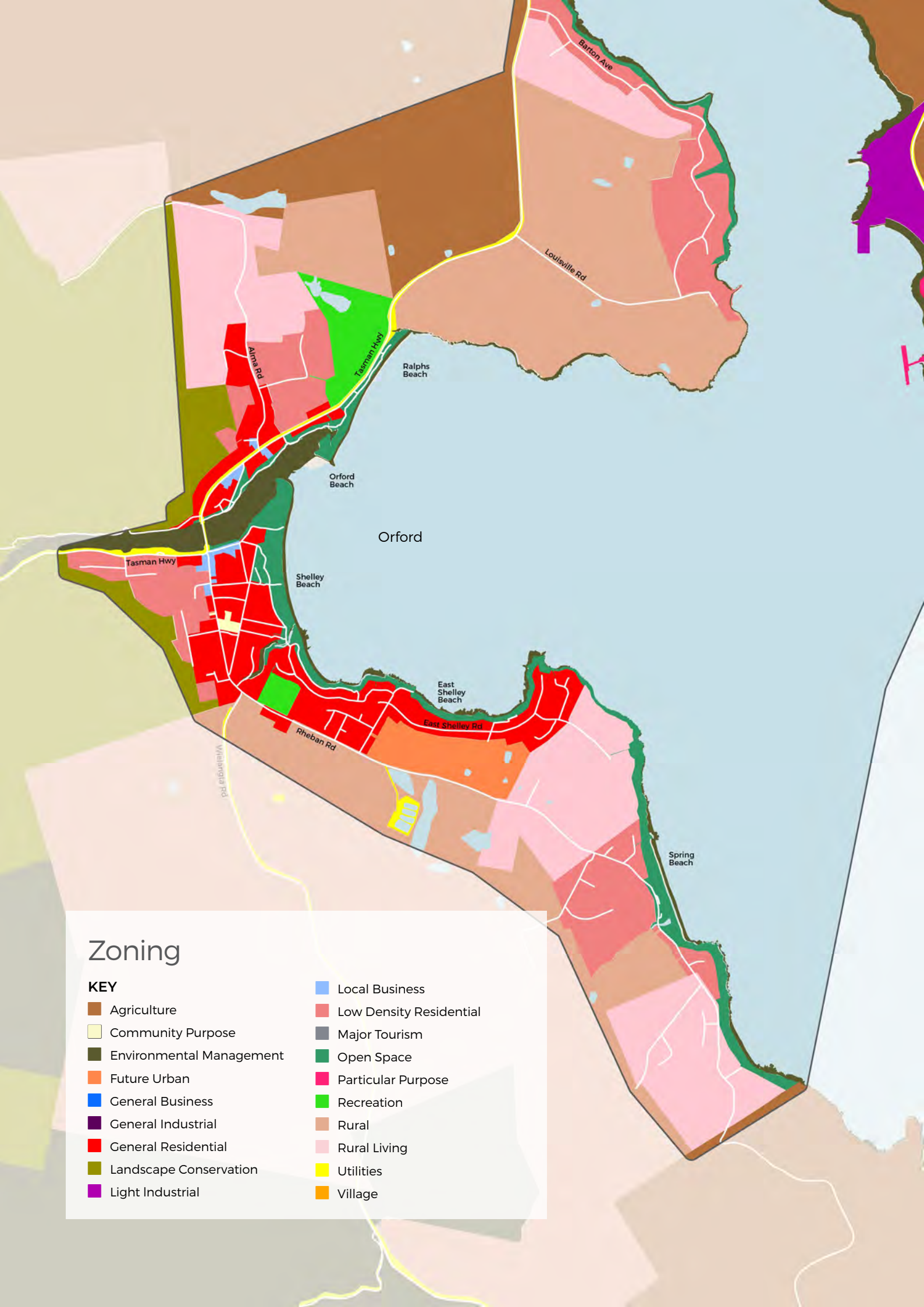
Study area

Study area


Vicarys Rivulet
Maclaines River
Tasman Hwy
Vicarys Rivulet
Freestone Point Rd
Esplanade E
Tasman Hwy
Triabunna
Barton Ave
Spring Bay
Windless Bay
Orford Beach

Existing conditions

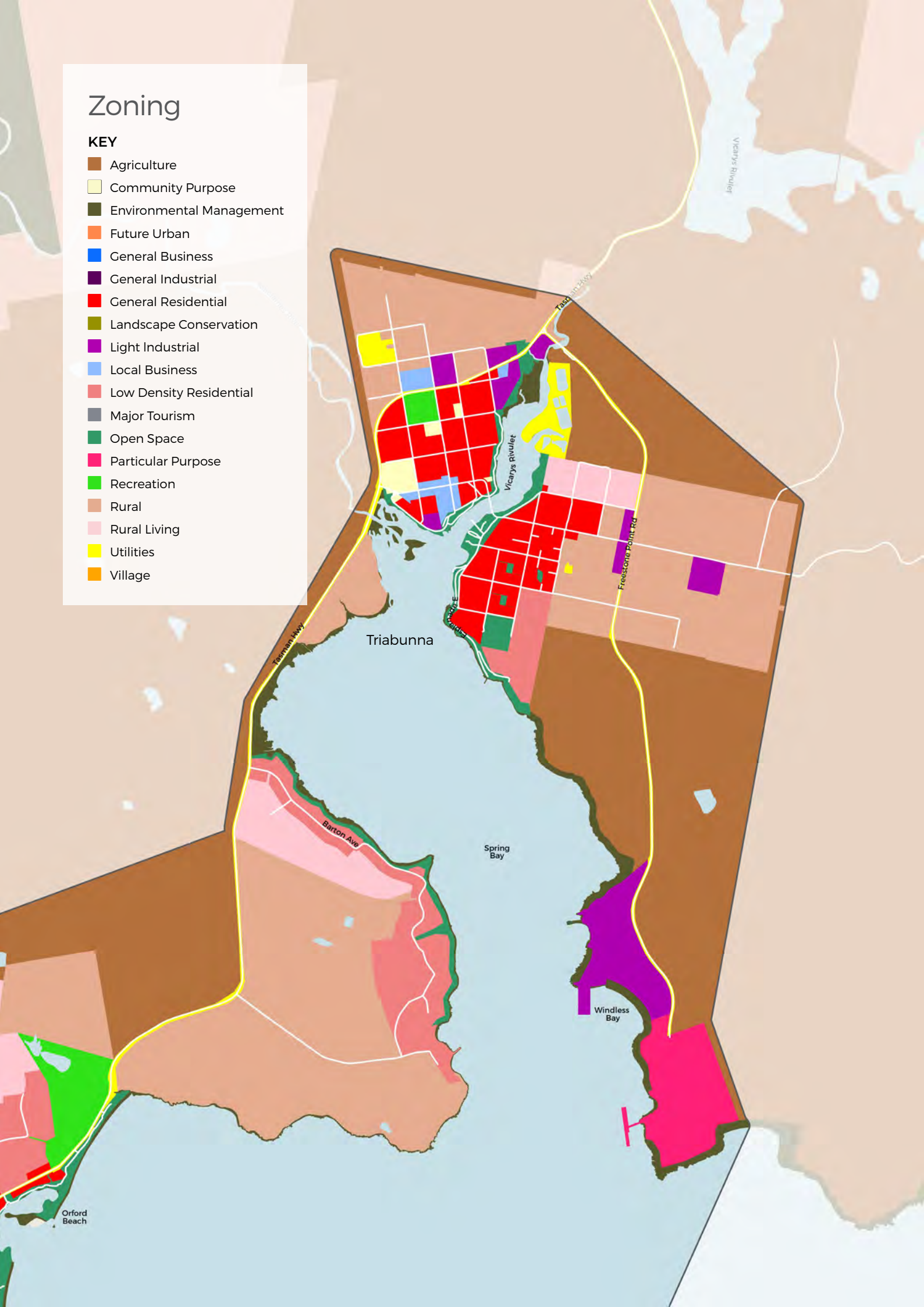
Existing conditions



Zoning

KEY

- Agriculture
- Community Purpose
- Environmental Management
- Future Urban
- General Business
- General Industrial
- General Residential
- Landscape Conservation
- Light Industrial
- Local Business
- Low Density Residential
- Major Tourism
- Open Space
- Particular Purpose
- Recreation
- Rural
- Rural Living
- Utilities
- Village


Zoning
KEY
Agriculture
Community Purpose
Environmental Management
Future Urban
General Business
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Major Tourism
Open Space
Particular Purpose
Recreation
Rural
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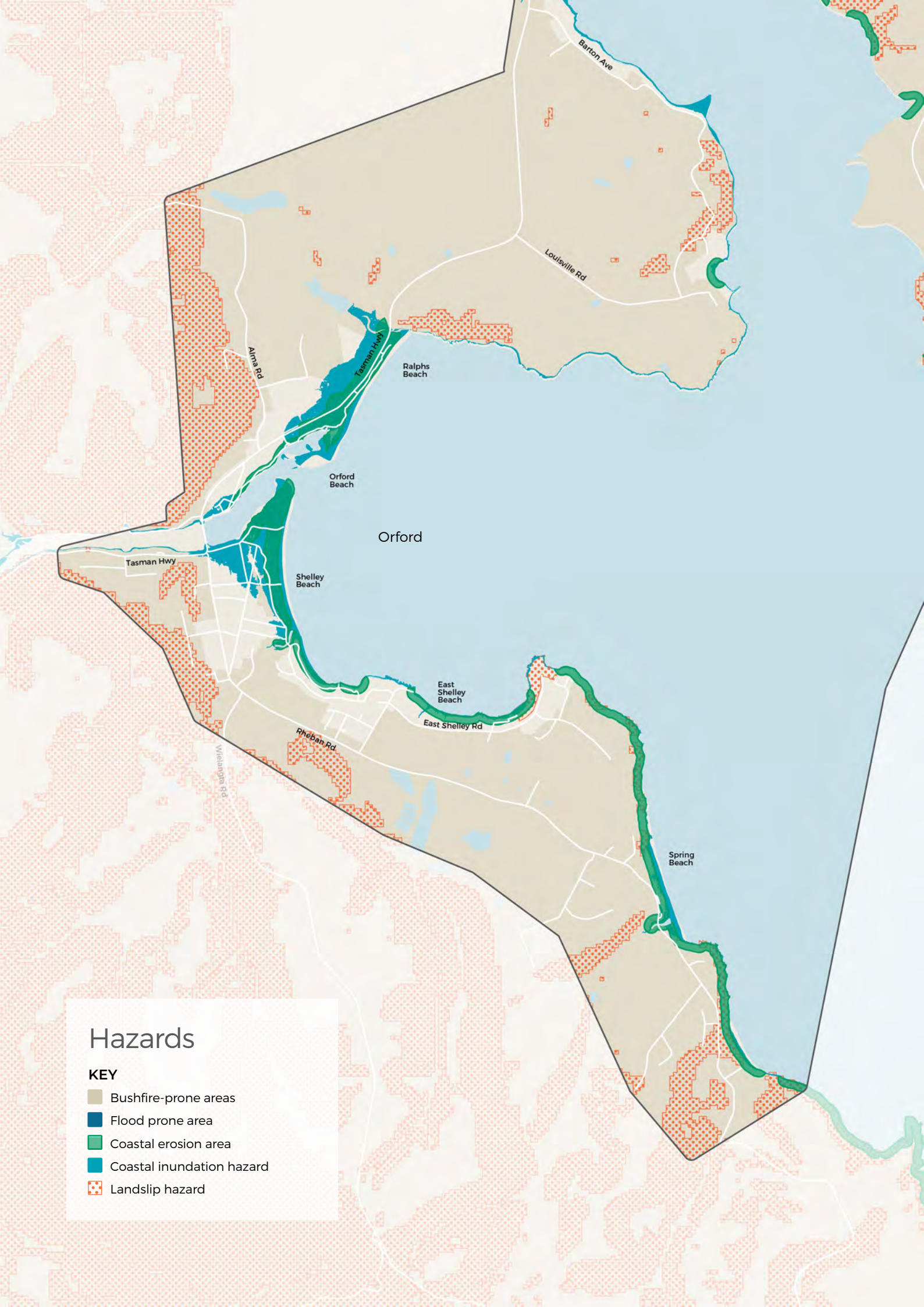
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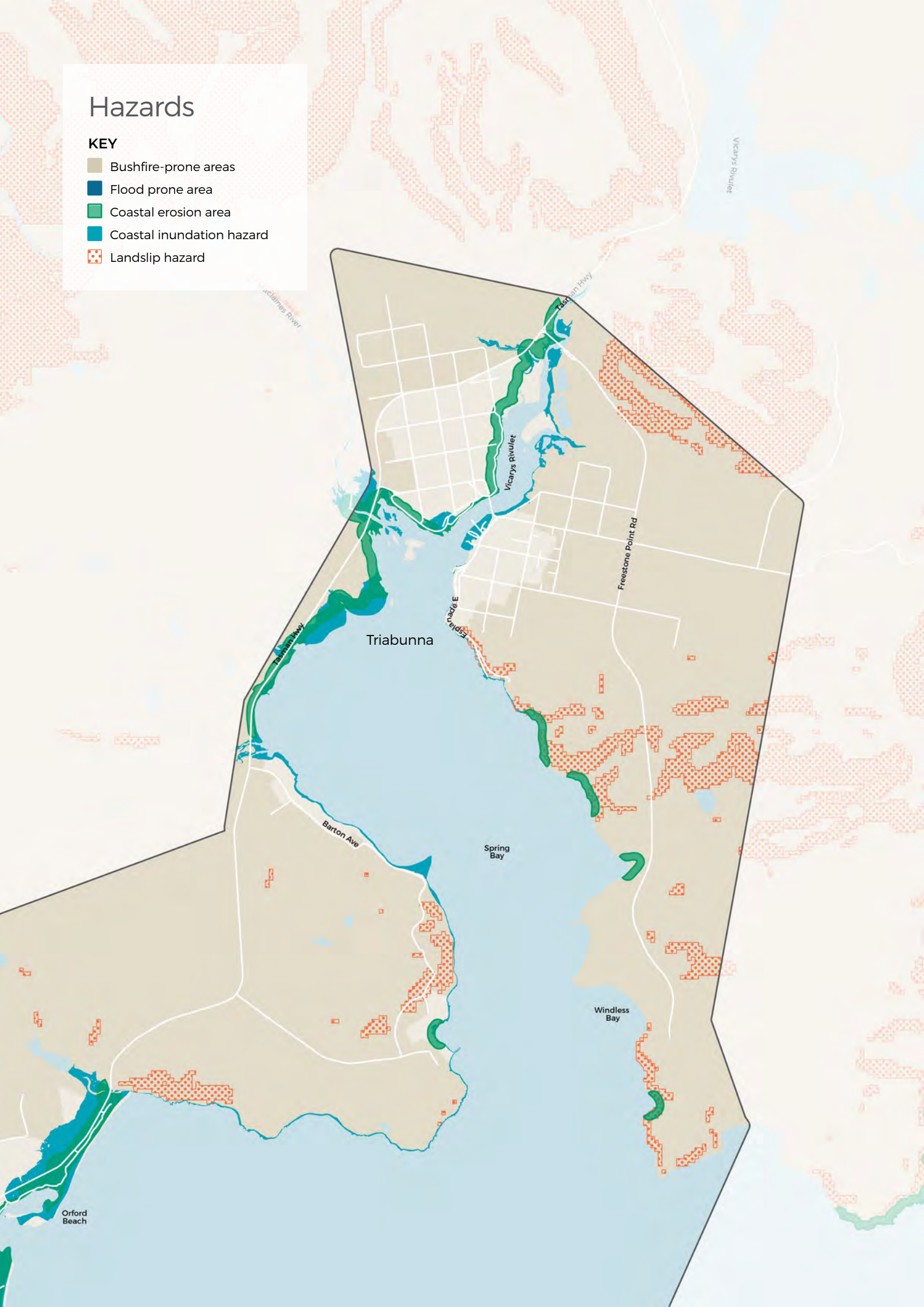
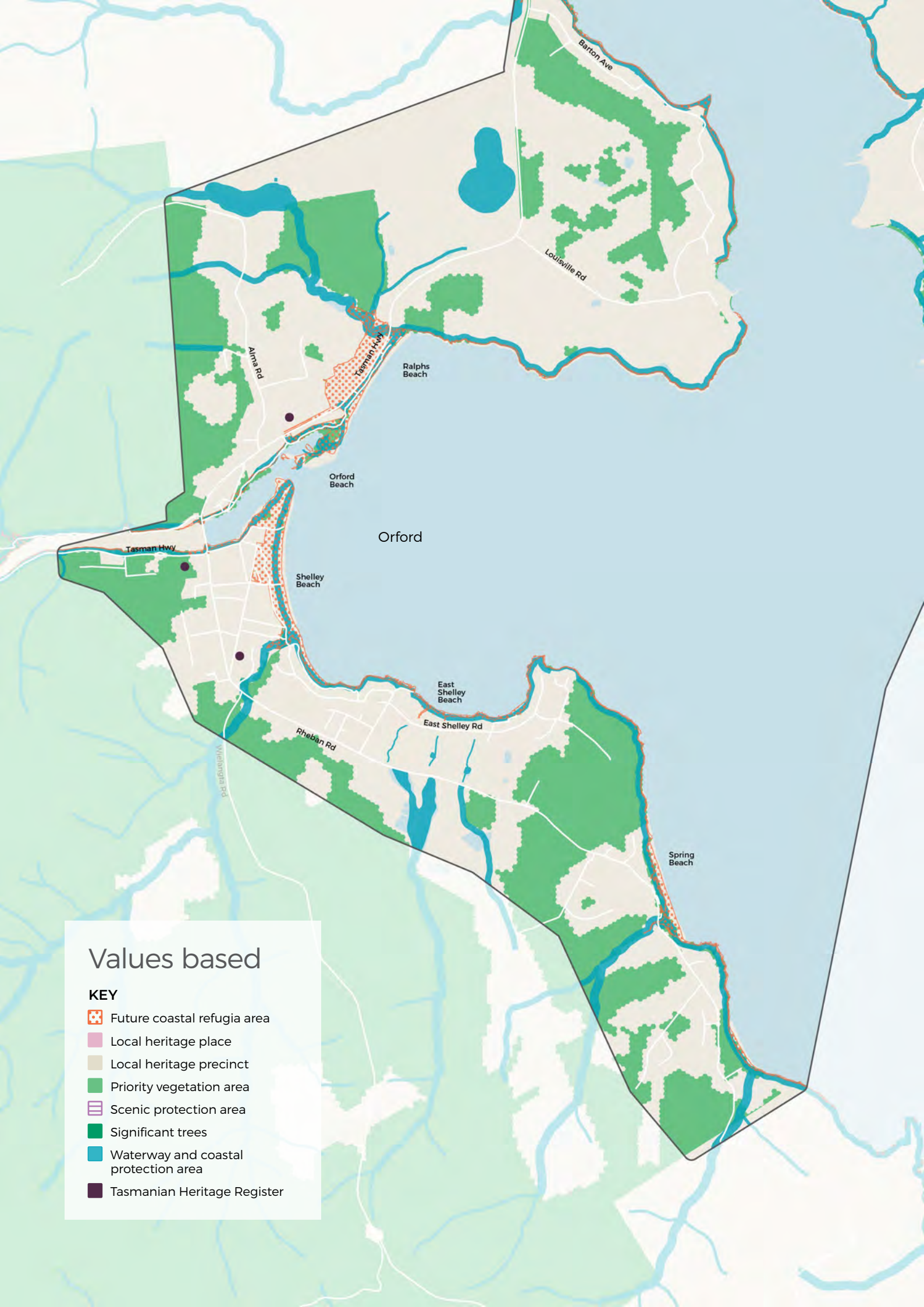
Orford Beach
Orford
Tasman Hwy
Shelley Beach
East Shelley Beach
East Shelley Rd
Rheban Rd
Wielangta Rd
Spring Beach
Hazards
KEY
Bushfire-prone areas
Flood prone area
Coastal erosion area
Coastal inundation hazard
Landslip hazard

Hazards

KEY

- Bushfire-prone areas
- Flood prone area
- Coastal erosion area
- Coastal inundation hazard
- Landslip hazard

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Tasman Hwy
Shelley Beach
East Shelley Beach
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Wielangta Rd
Spring Beach
Values based
KEY
Future coastal refugia area
Local heritage place
Local heritage precinct
Priority vegetation area
Scenic protection area
Significant trees
Waterway and coastal protection area
Tasmanian Heritage Register


Values based
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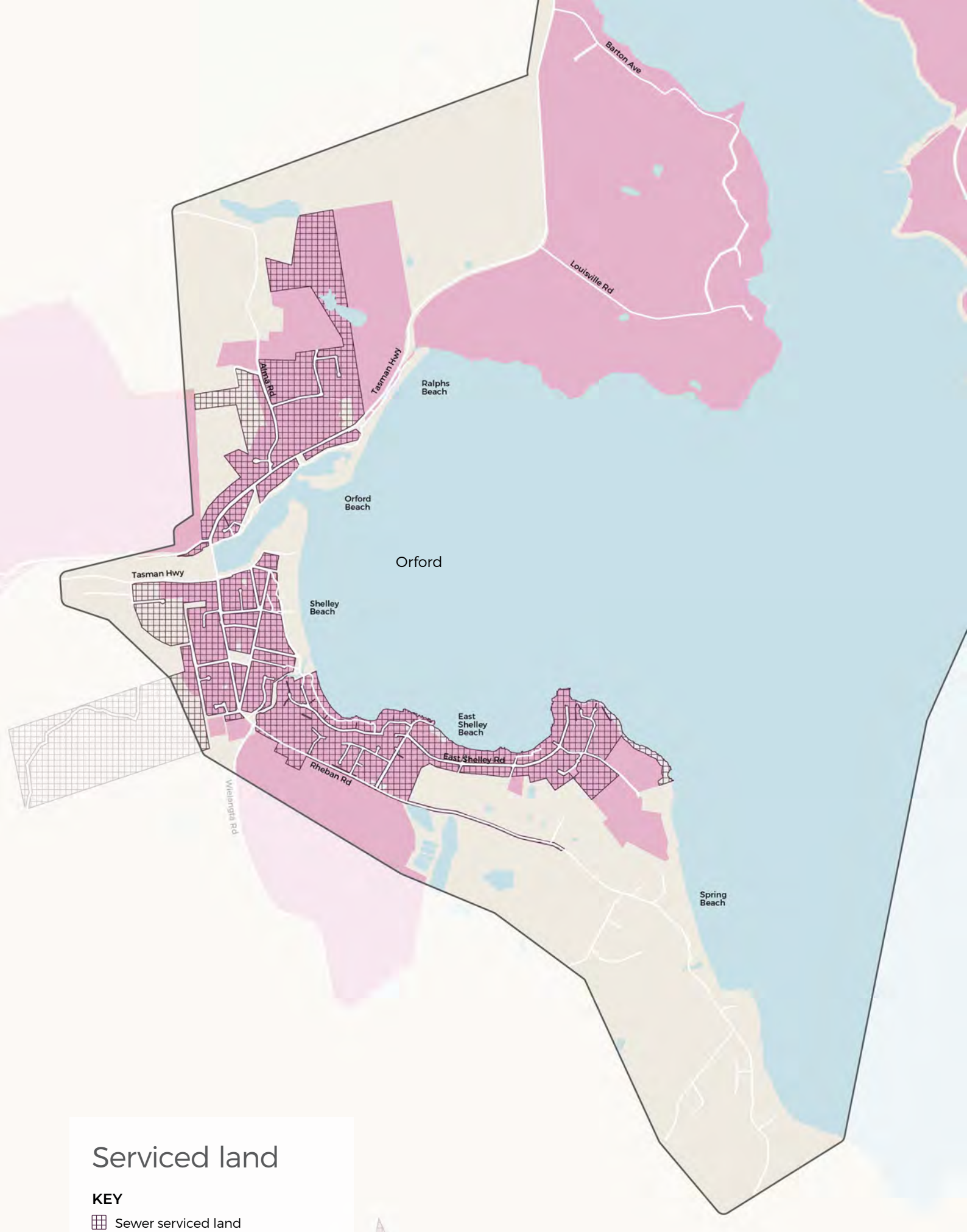


Serviced land

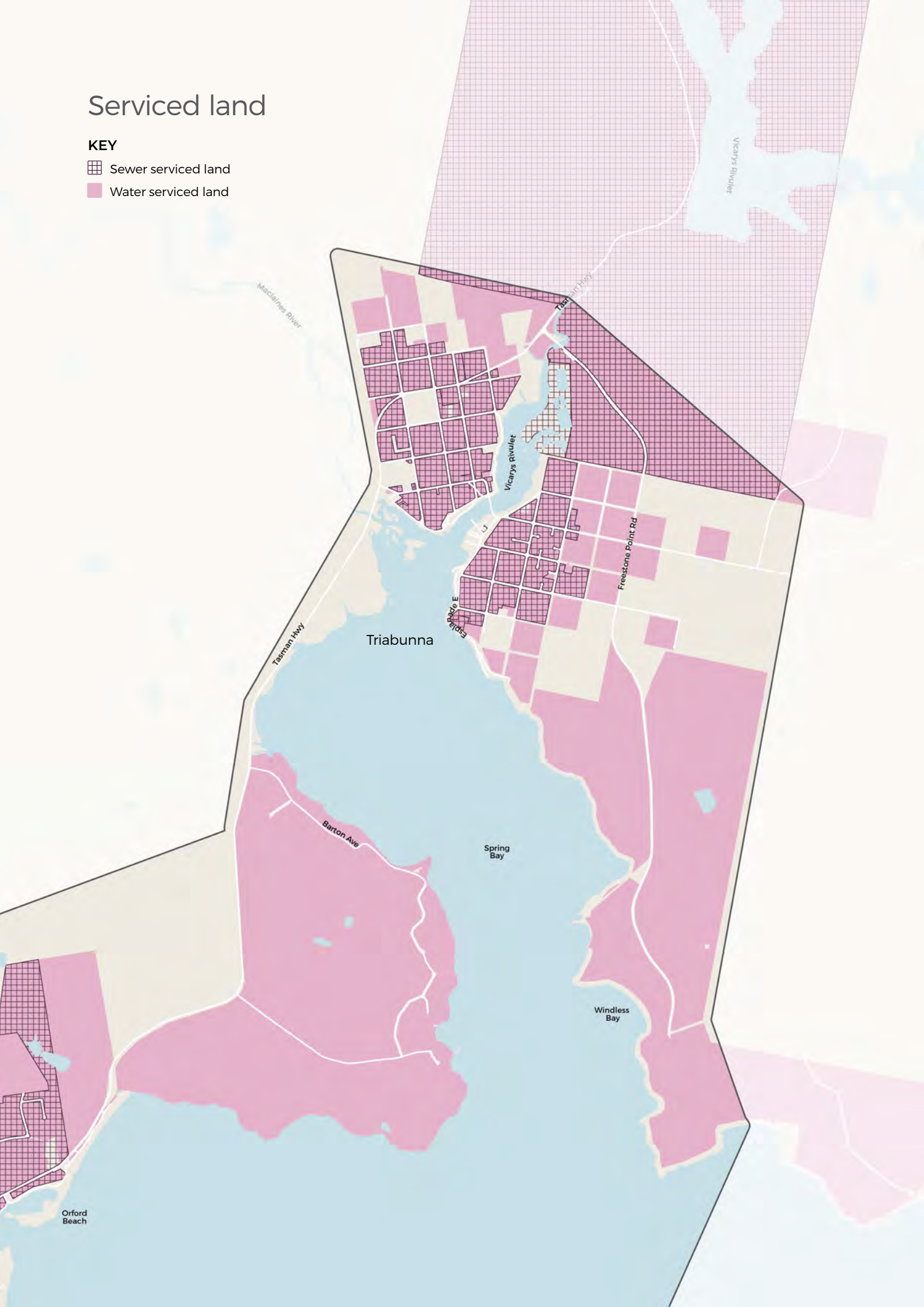
KEY

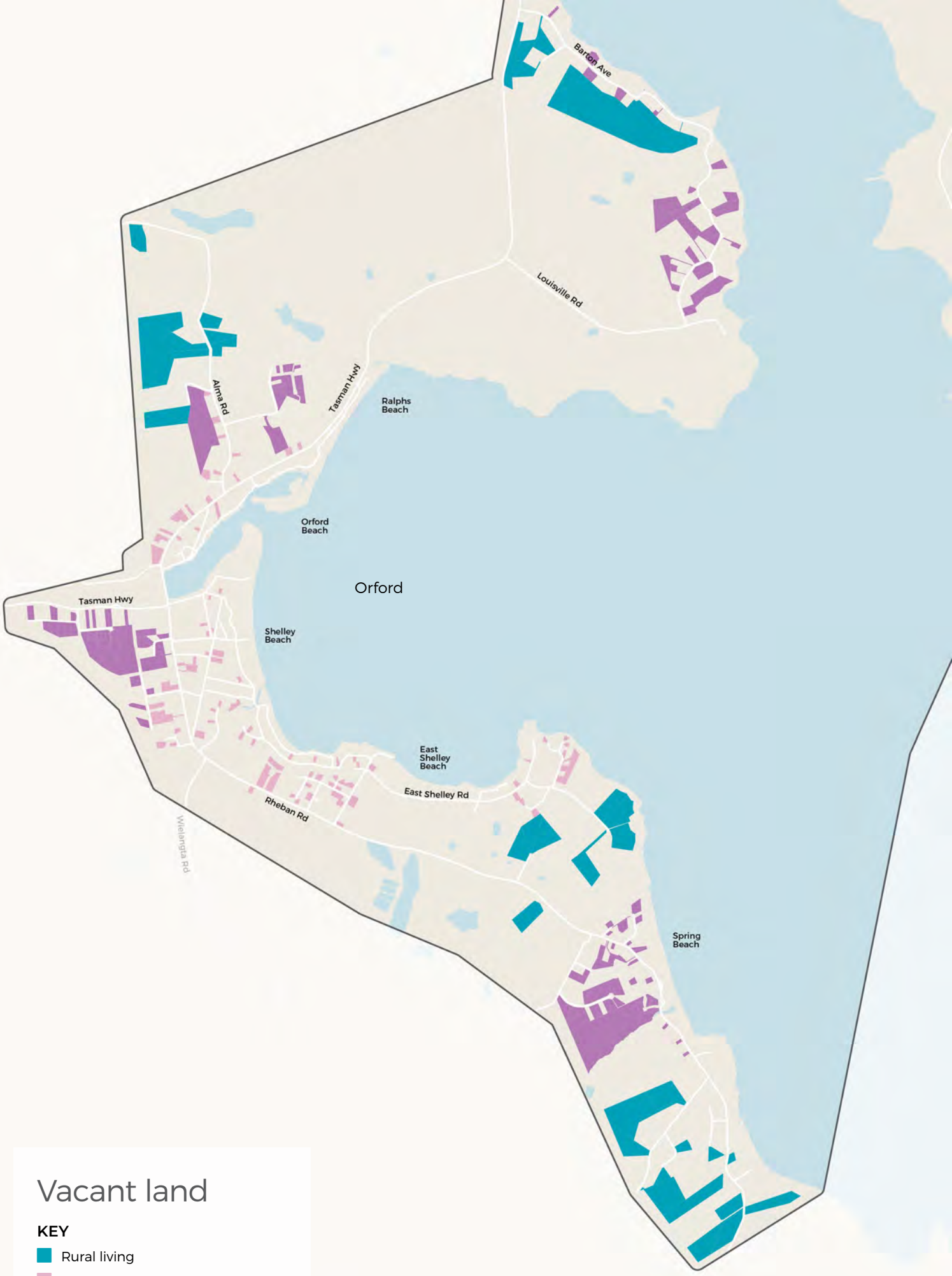
- Sewer serviced land
- Water serviced land

Serviced land

KEY

- Sewer serviced land
- Water serviced land





Vacant land

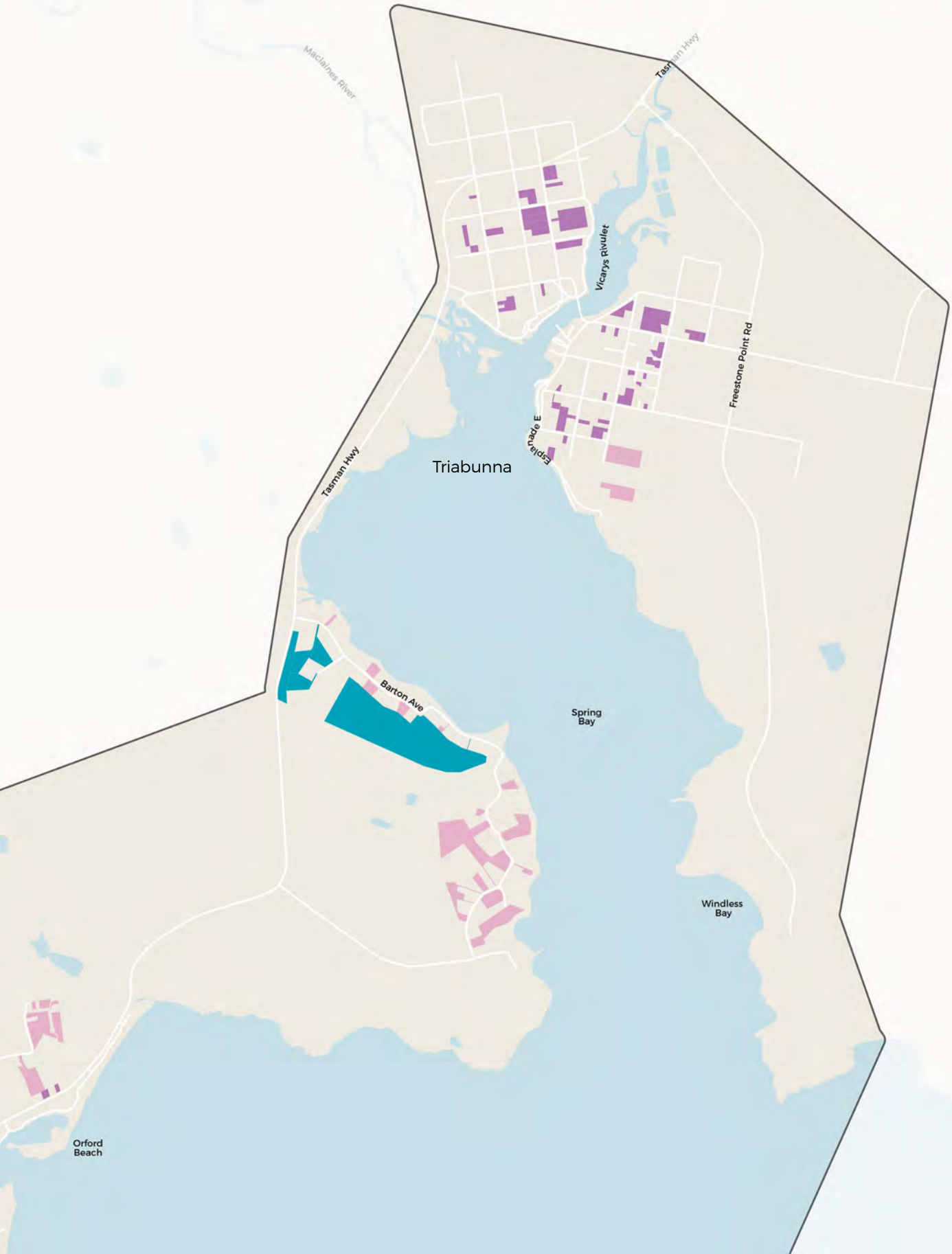
KEY

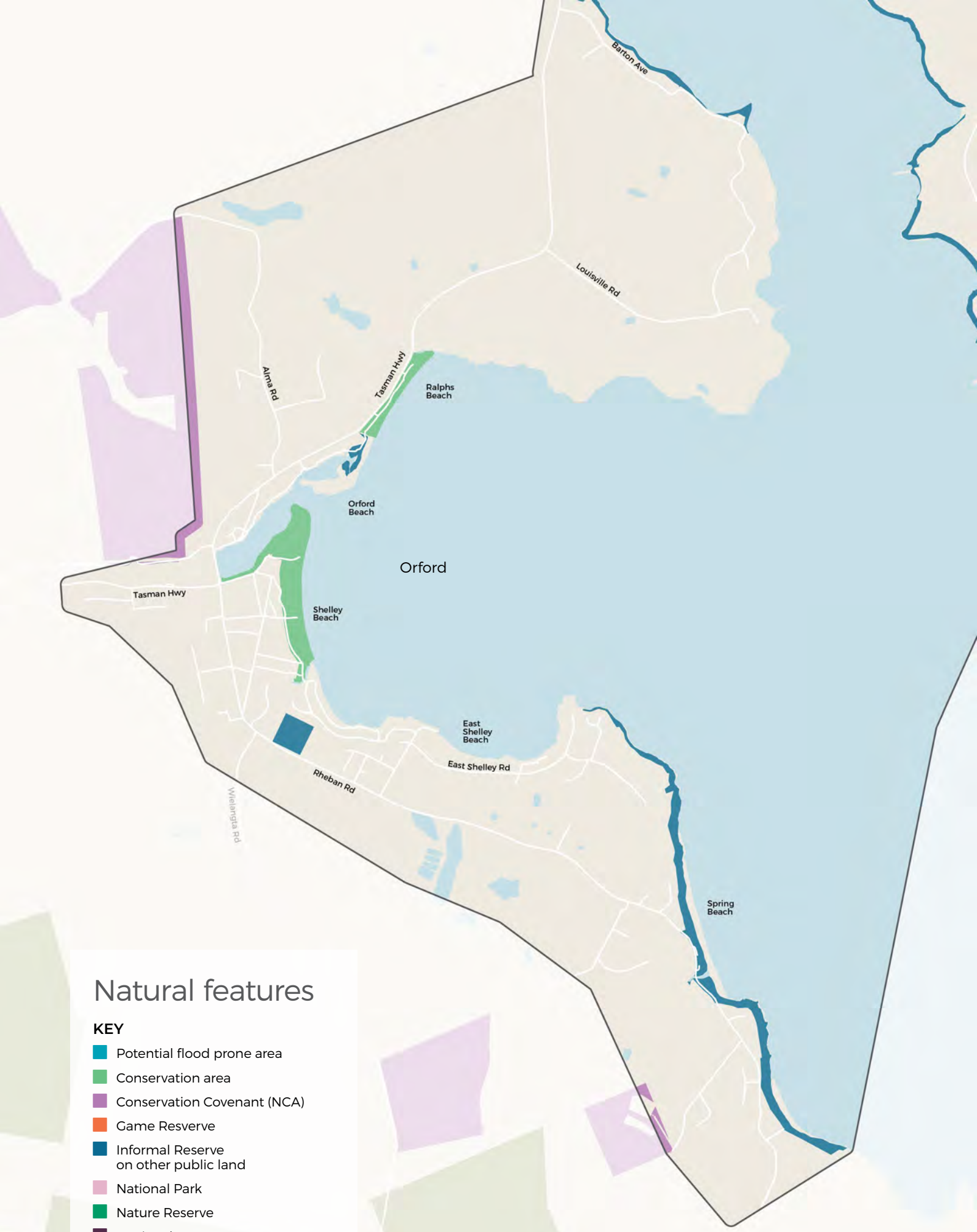
- Rural living
- Low density residential
- General residential

Vacant land

KEY

- Rural living
- Low density residential
- General residential



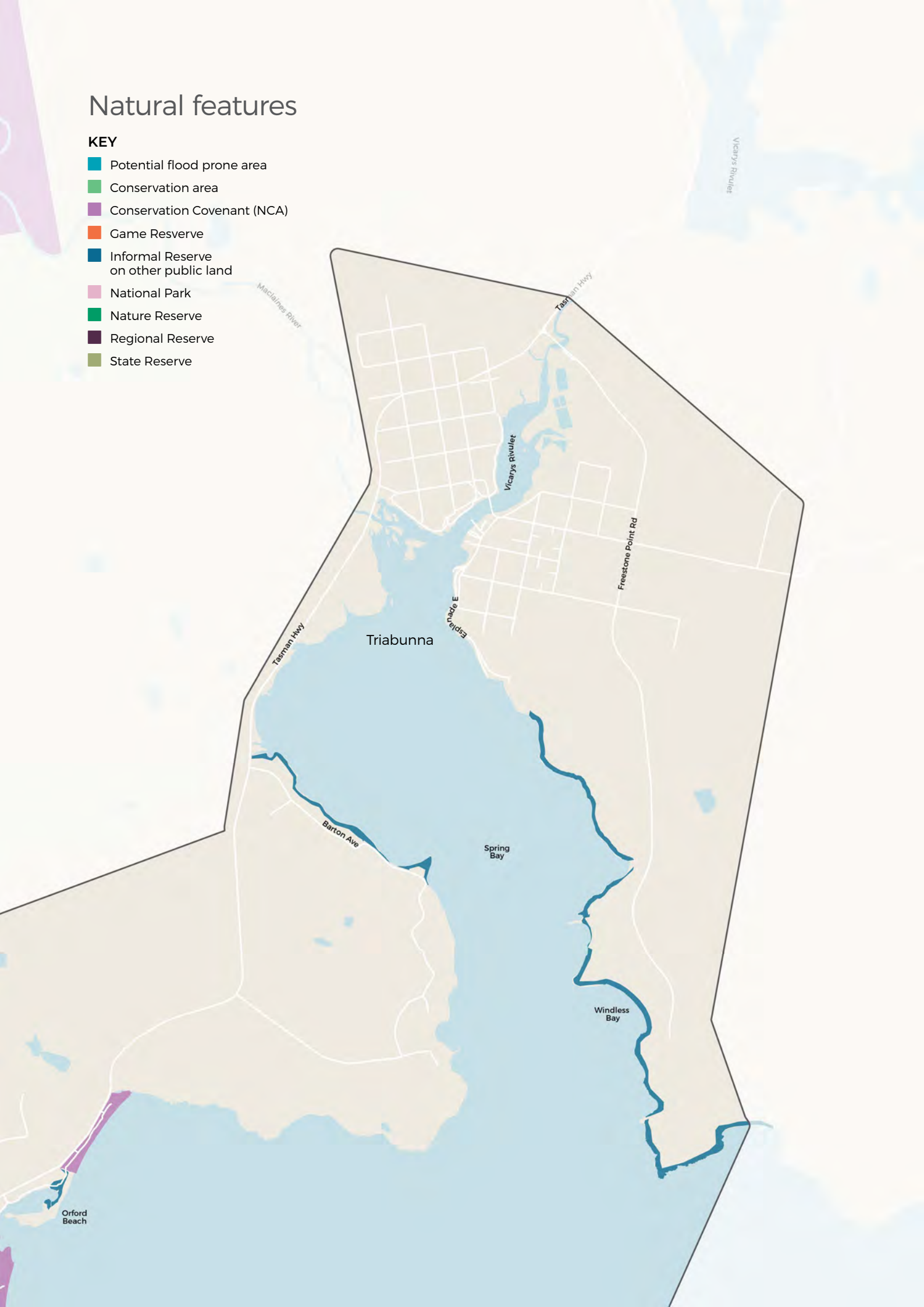


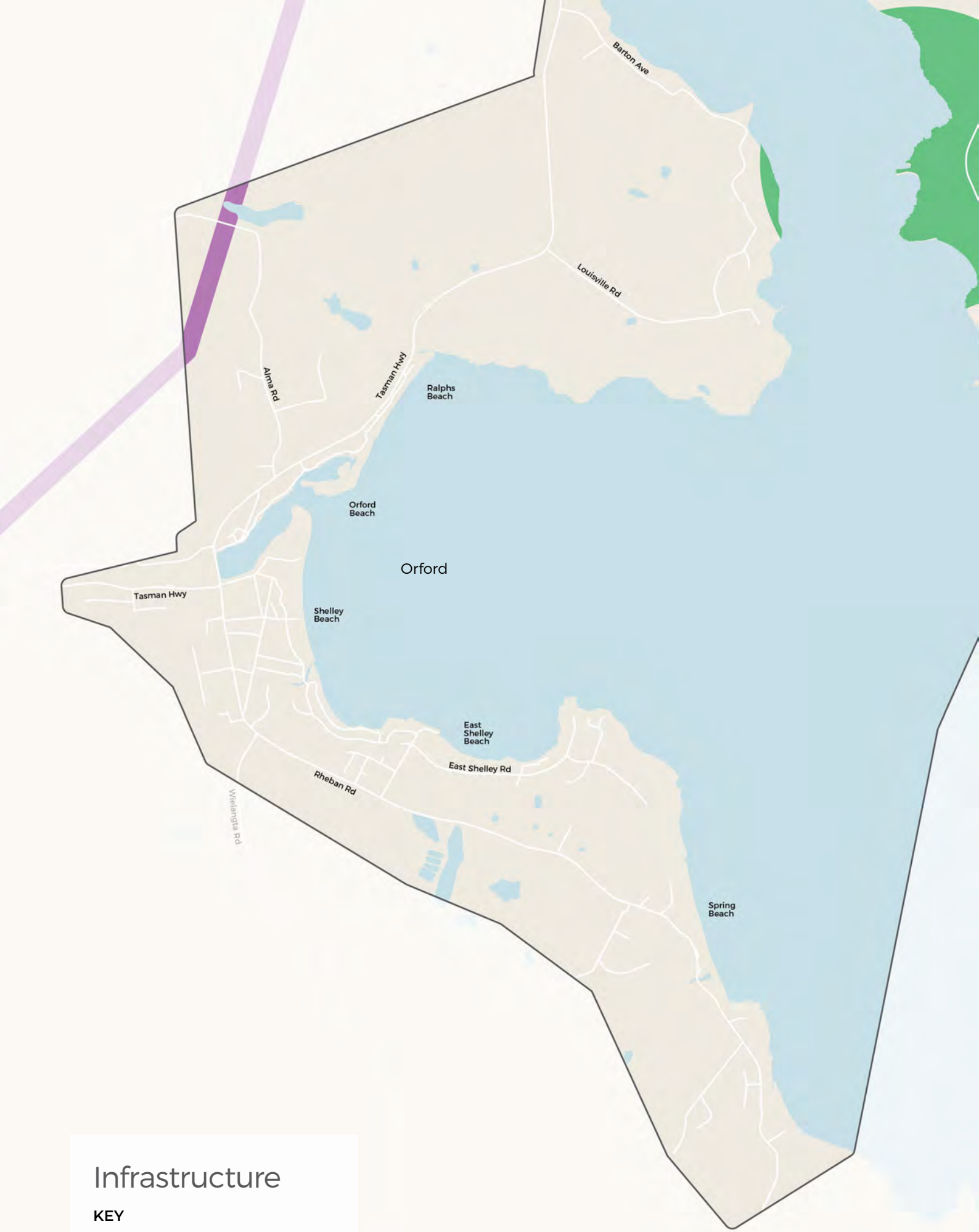
Natural features

KEY

- Potential flood prone area
- Conservation area
- Conservation Covenant (NCA)
- Game Resverve
- Informal Reserve on other public land
- National Park
- Nature Reserve
- Regional Reserve
- State Reserve

Natural features





Infrastructure

KEY

- Attenuation area
- Electricity tranmission infrastructure

Infrastructure

KEY

- Attenuation area
- Electricity tranmission infrastructure

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& ENVIRONMENT

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