BRIGHTON SOCIO-ECONOMIC PROFILE & OPPORTUNITY ASSESSMENT

BRIGHTON COUNCIL
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EXECUTIVE SUMMARY

BACKGROUND & PURPOSE

The councils in the Greater Hobart Area (Greater Hobart) of Brighton, Clarence, Glenorchy, Hobart and Kingborough are seeking economic data and analysis to establish a consistent set of baseline data to inform strategic decision making at a local government and regional level.

The report will be used to understand the economic and social trends of Brighton Local Government Area (LGA) with comparisons to Greater Hobart. The report identifies a range of potential opportunities that exist and the role of each council in developing these opportunities as well as opportunities for councils to collaborate for the economic development of Greater Hobart.

APPROACH

AEC undertook background research for Greater Hobart, including a literature review**,** data collection and profiling as well as a desktop opportunity assessment. The profiling and analysis were conducted for each of the five councils, which comprise Greater Hobart, and for Greater Hobart as a whole. Analysis of specific precincts within Greater Hobart was also undertaken to provide greater understanding of the key employment and population locations. Analysis on the key macro-economic trends and influencing factors has also been undertaken.

Economic and employment projections were developed accounting for multi-factor productivity at a 1-Digit ANZSIC sector level for Tasmania and disaggregated to Greater Hobart using historical growth rates compared to Tasmania and then LGAs by contribution to Greater Hobart's economic growth in the historical period. These projections were refined through consultation with key stakeholders via group workshops, face to face individual interviews and an online business survey (with a low number of responses).

Economic opportunities and key critical actions have been determined for the Greater Hobart area as well as specialisations to Brighton.

KEY FINDINGS

The key findings from the analysis following the literature review, background economic analysis and opportunity analysis, are summarised below:

- Brighton's economy has recorded considerable economic growth in recent years largely driven by growth in the transport, postal and warehousing, and health care and social assistance industries. Transport, postal and warehousing is anticipated to continue to grow strongly into the future being Brighton's fastest growing industry.
- Brighton's population has experienced relatively strong growth in recent years. The population tends to be younger than the other LGAs in Greater Hobart but has lower socio-economic outcomes with lower educational attainment and lower household incomes than the Greater Hobart average.
- Brighton has a low proportion of skilled workers which is likely contributing to the high unemployment rate in the Brighton, the highest in the state (at 11.9%).

Key opportunities from that have identified for Brighton are in the table below, whilst the full explanations including Council's role are in Section 5:

Table. ES.1. Opportunities for Brighton

Opportunity	Role	Rationale and Key Focus Area
Intensify Primary Resource Production & Value Adding Supply Chains	Planning and Regulation/ Facilitation	Water and land-based agricultural activities can be intensified locally, increasing local production (including areas surrounding the defined Greater Hobart catchment) and improving local supply chains (both business to business and business to consumer).
Provide Key Services and Infrastructure to Attract and Retain Population	Planning and Regulation, Facilitation	Population growth in Greater Hobart has accelerated in recent years, placing a strain on existing housing and transport infrastructure. Accommodating future population growth in Greater Hobart will require additional soft and hard infrastructure investment and attraction. Key focus areas for Brighton include: • Arts and recreation • Health care and social assistance • Administration and support services • Construction.
Relocation and Intensification of Transport, Postal & Warehousing to Specific Activity Nodes	Planning and Regulation/ Facilitation	The Greater Hobart Area benefits from the presence of a port, airport and significant economic activity. There is an opportunity to further leverage this activity through the expansion and relocation of transport, postal and warehousing activities to appropriate sites and undertake urban renewal on existing sites. Brighton has a large volume of land available for these uses and is able to accommodate activities which are currently located in Glenorchy. Brighton's close geographical proximity to the airport would also provide a benefit to industrial activities in the LGA.
Support the Emerging Information Technology Sector	Planning and Regulation/ Facilitation	In an increasingly 'smart' world, there are hidden technological aspects of almost all industries. There is, therefore, considerable opportunity for expansion and diversification of the information technology sector, including small-scale technology businesses (application development, game development etc). The lifestyle offering of Greater Hobart could assist in attracting these businesses to the region. There are existing, small-scale clusters of IT activity within Greater Hobart, which Brighton can potentially leverage. Encouraging collaboration and partnering within the industry and with other industries has the potential to support additional activity within the industry as well as growing Greater Hobart's reputation as a centre for technology clusters.
Increase Local Participation in the Green & Circular Economies	Planning and Regulation/ Facilitation	Tasmania has a worldwide reputation as a clean, green and pristine environment. There are significant opportunities to leverage this perception and reality for Greater Hobart to increase its participation in the green and circular economies through: • Increased production of green and renewable energy (in Brighton) • Increased education of local business and residents in reducing energy consumption and the use of single-use plastic products

Opportunity	Role	Rationale and Key Focus Area
Continue to Monitor the Demand Potential & Feasibility of a Multi-Use/ Conference Facility in Greater Hobart	Advocacy	Hobart is the only state or territory capital that does not have the capacity or capability to host large-scale (in excess of 1,300 persons for a sit-down dinner) conferences and business events. The business conference and events sector attracts visitors both nationally and internationally and is increasingly competitive, with destination brand and desirability of visitation playing a large part in conference organiser decision making. Hobart has significant points of difference to existing centres and this may be viewed as a clear opportunity. Assessment of the feasibility for a conference facility in Hobart is undergoing consideration. In addition to external visitation, as population and business activity within Greater Hobart expands, the demand profile and feasibility of the development will equally change.
Work with Partners to Highlight Education Pathways for Youth to Increase Education Aspirations and Outcomes	Advocacy	Educational attainment levels are low in Greater Hobart, on a national comparison and indicators show this factor is intergenerational and typically results in low familial expectations and, potentially, lower levels of youth educational aspirations. Whilst delivery of education is a state function, local Councils can play a role in advocating for the development of education pathways for students, in line with local industry requirements where skills shortages may be identified. Linking business, industry, local schools, tertiary and vocational education is an important activity that all levels of government can participate in.

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1. INTRODUCTION

1.1 BACKGROUND & PURPOSE

The councils in the Greater Hobart Area (Greater Hobart) of Brighton, Clarence, Glenorchy, Hobart and Kingborough are seeking economic data and analysis to establish a consistent set of baseline data to inform strategic decision making at a local government and regional level.

The report will be used to understand the economic and social trends of Brighton Local Government Area (LGA) with comparisons to Greater Hobart. The report identifies a range of potential opportunities that exist and the role of each council in developing these opportunities as well as opportunities for councils to collaborate for the economic development of Greater Hobart.

1.2 APPROACH

AEC undertook background research for Greater Hobart, including a literature review**,** data collection and profiling. The profiling and analysis were conducted for each of the five councils and Greater Hobart. Analysis of specific precincts within the region was also undertaken to provide greater understanding of the key employment and population locations within Brighton. Analysis on the key macro-economic trends and influencing factors has also been undertaken.

A desktop opportunity assessment was undertaken including examining location quotients and cluster mapping for Brighton to determine the specialisation of the region and which industries could be pursued through economic development activities. Import export analysis for Brighton and Greater Hobart was also undertaken as part of the opportunity assessment.

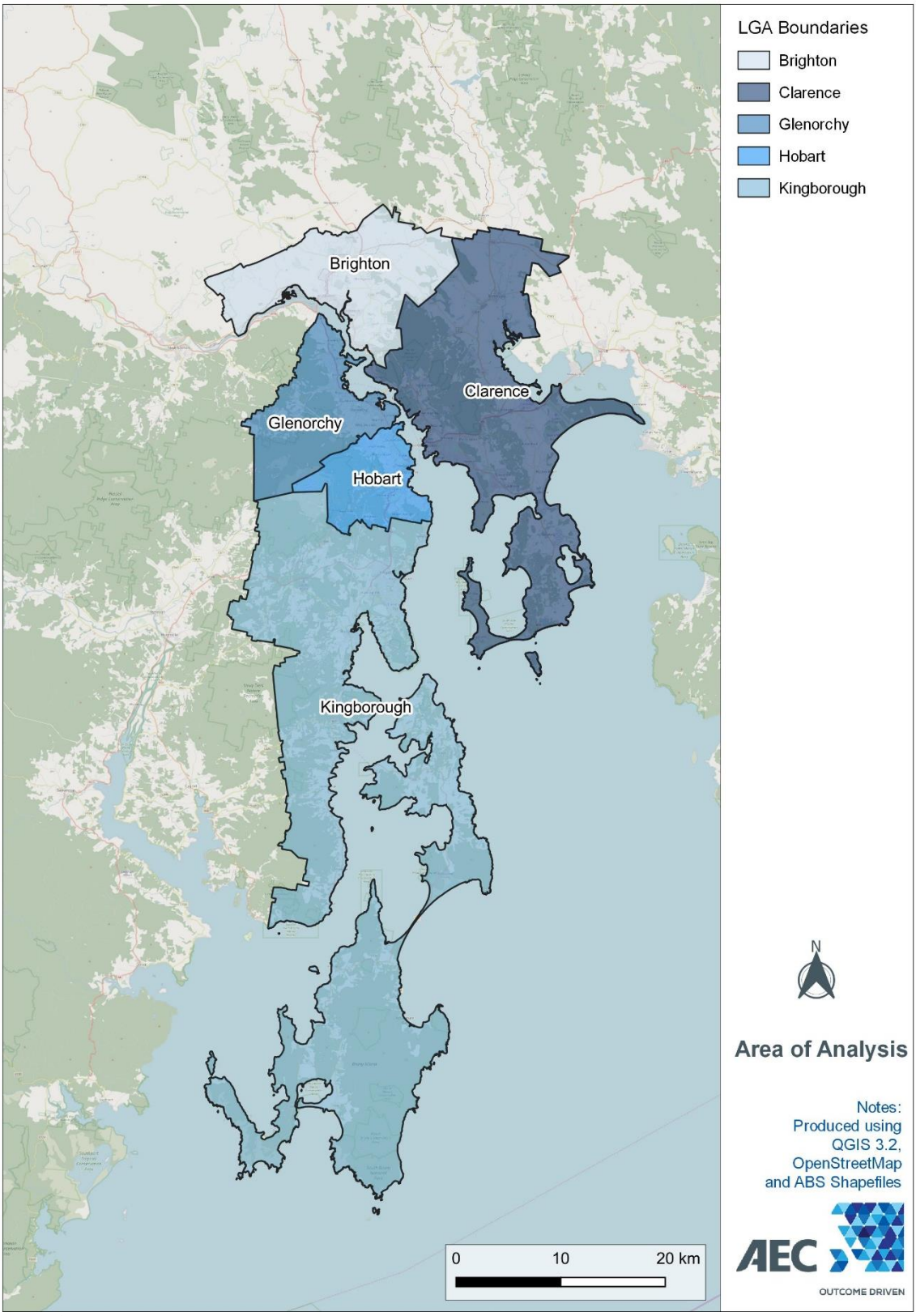
Economic and employment projections were developed accounting for multi-factor productivity at a 1-Digit ANZSIC sector level for Tasmania and disaggregated to Greater Hobart using historical growth rates compared to Tasmania and then Local Government areas by contribution to Greater Hobart's economic growth in the historical period. These projections will be refined through consultation with key stakeholders via group workshops, face to face individual interviews an online business survey (with a low number of responses).

Following the desktop opportunity analysis, consultations with key stakeholders were undertaken in each of the LGA areas. Economic opportunities and key critical actions have been determined for the Greater Hobart area as well as specialisations to Brighton.

1.3 GEOGRAPHY

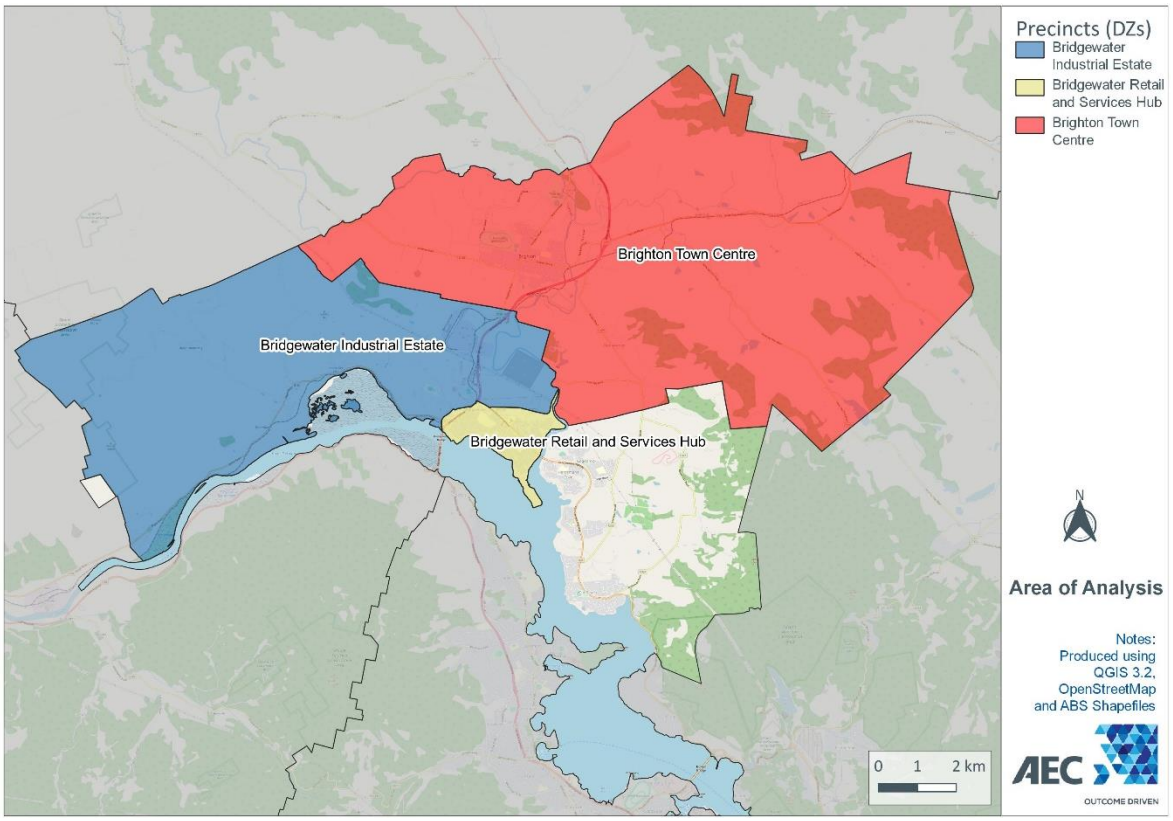
Precincts were established and used to analyse the key employment and population centres within Brighton at a smaller level. Precincts were defined as the sum of Statistical Area 1s (SA1) and used to analyse population-based statistics, while precincts comprised of Destination Zones (DZ) were used to analyse employment statistics.

Figure 1.1. Greater Hobart Map



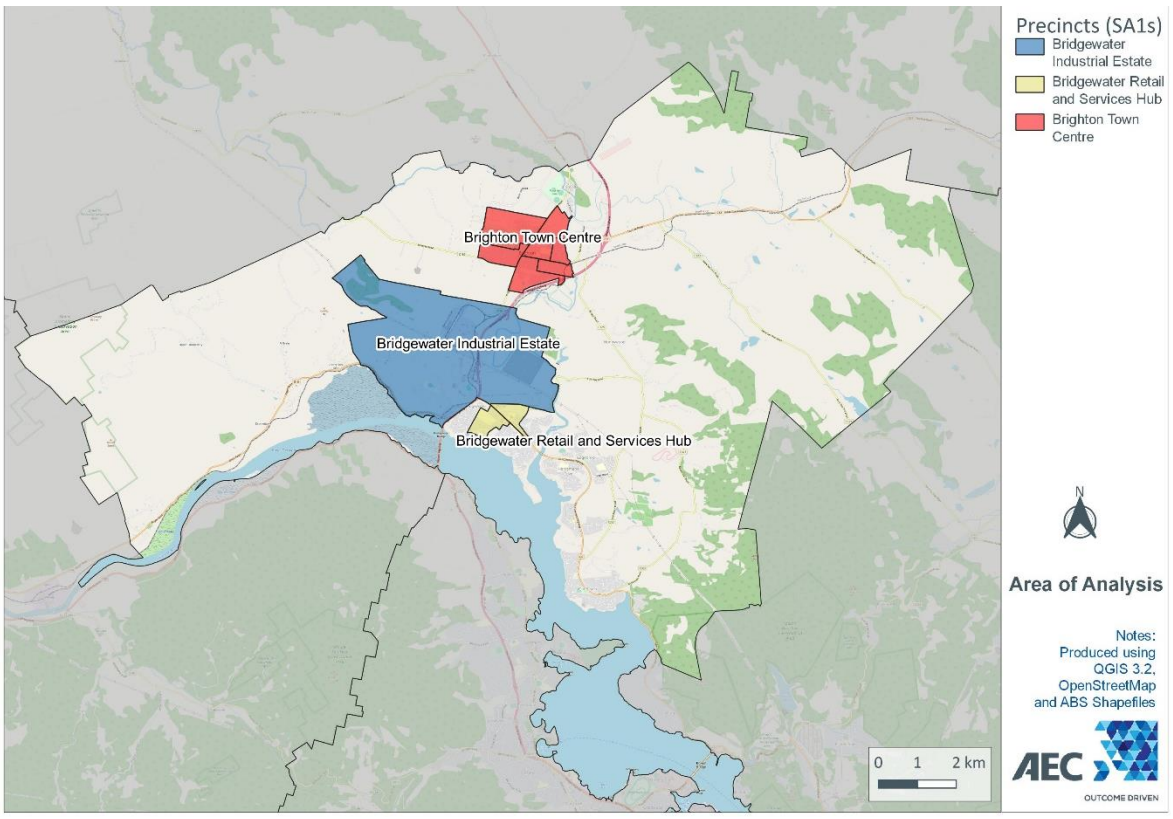
Source: AEC.

Figure 1.2. Brighton Precinct Map by DZ



Source: AEC.

Figure 1.3. Brighton Precinct Map by SA1



Source: AEC.

2. SOCIO-ECONOMIC PROFILE

The following chapter outlines the key socio-economic trends that are affecting Brighton. Tables and graphs of the data can be found in **Appendix A**.

2.1 POPULATION AND DEMOGRAPHICS

In 2018, Brighton Local Government Area (LGA) recorded a population of 17,294, an average annual increase of 1.8% per annum since 2001 (ABS, 2019a). Growth was strongest in 2004 at 3.2% before slowing to a low of 0.8% in 2011. Population growth has recovered, to be 2.0% in 2018. By 2041 Brighton is expected to have a population of 22,489 following growth of 1.2% annually from 2019 to 2041, suggesting a significant expansion in population base (DoTF, 2019).

The Brighton population has a younger age distribution than Greater Hobart overall, with an average age of 35.2 years, compared to 39.8 years (ABS, 2018). This is primarily driven by the high proportion (37.5%) of the population aged under 25 years coupled with the fact that approximately half the population is aged between 25 and 64 years. Whilst the region has a relatively young age distribution, it has recorded an aging in the population since 2007, when the average age of the population was 32.4 years.

Of those persons living in Brighton in 2016, approximately 78.5% lived in Brighton in 2011. Of those persons who had relocated into Brighton between these two periods, the most common source was Glenorchy, which accounted for 8.1% of the population growth.

2.2 ECONOMY

Brighton's Gross Regional Product (GRP) reached almost $400 million in 2017-18, following growth of 3.0% from the previous year (AEC, unpublished). This is faster than the average annual growth Brighton recorded from 2006-07 to 2017-18 of 2.1% per annum. Brighton has consistently had stronger economic growth than Greater Hobart since 2012-13 growing at an average annual rate of 2.9% per annum compared to 1.7% per annum. Despite growth being strong at 3.0% in 2017-18, this is a decline from its peak in 2014-15 at 4.0%.

To understand how the Brighton economy aligns with the performance of its peers, comparisons have been made with Inverell, Muswellbrook and Burdekin (which all have a relatively similar population size). By comparison with these regions, Brighton recorded the second fastest average annual growth of from 2006-07 to 2017-18 expanding at an average of 2.1%p.a, whilst Muswellbrook grew by 3.3%p.a. Burdekin followed at 1.6%p.a and Inverell last at 0.7%p.a.

The most prominent industry in Brighton was transport, postal and warehousing due to the region being a key asset in road transportation (AEC, unpublished). Following this was construction and health care and social assistance.

In 2016, approximately 2,991 persons worked in Brighton (by place of work), approximately 16.7% of whom were employed by the transport, postal and warehousing sector – the most prominent local sector by employment (ABS, 2017). Since 2011, transport, postal and warehousing has overtaken construction to be the most prominent employing sector in Brighton. The sector's prominence has resulted in a strong base of industrial skills in the region, with high levels of employment (by place of work) in occupations of technicians and trades workers and machinery operators and drivers. Construction and education and training were also key employing sectors in Brighton in 2016, employing approximately 13.7% and 12.3% of the local labour force in 2016, respectively.

In 2016 Brighton had a labour force participation rate of 61.1%, just under that of Greater Hobart at 61.6%. This is higher than the Tasmanian average, but lower than Australia at 59.3% and 64.6% respectively. Brighton's labour force has expanded significantly since September 2016, to be 8,206 in March 2019. Growth in labour force since 2006 is likely a result of the increase in population over this time with labour force growing at 1.4% per annum and population growing by 1.6% per annum. Whilst employment has been increasing, the local unemployment rate is the highest rate in the state at 11.9% whilst Greater Hobart is at 6.1% (Department of Jobs and Small Business, 2019).

2.3 KEY INDUSTRIES

2.3.1 Transport, Postal and Warehousing

Transport, postal and warehousing was the most dominant industry in Brighton contributing 19.5% of IVA in 2017-18. The industry has recorded strong growth in recent history, growing at an average annual rate of 4.1% per annum since 2006-07. The industry is the most prominent employer in Brighton, with the majority of the industry's employment being in road freight transport (ABS, 2017a). The Bridgewater Industrial Estate Precinct employs almost half of the municipality's transport, postal and warehousing employment (by place of work) with the transport and logistics hub being located in the precinct. Of the people working in transport, postal and warehousing in Brighton, 30.6% also live within the LGA followed by 27.8% living in neighbouring Glenorchy.

Table 2.1. Proportion of Brighton Employment, Transport, Postal and Warehousing, 2016

Precinct	Proportion of Brighton Employment	Number of Employees
Bridgewater Retail and Services Hub	21.3%	102
Bridgewater Industrial Estate	50.7%	243
Brighton Town Centre	26.3%	126
Elsewhere in Brighton	1.6%	8
Total	**100.0%**	**479**

Source: ABS (2017a).

2.3.2 Construction

Construction was the second largest contributor to IVA in 2017-18, accounting for 16.3% of total IVA in 2017-18 following average annual growth of 2.0% per annum from 2006-07. Construction was also the second largest employing industry in 2016 at 13.7% of total employment (by place of work) and was most prominent in the Brighton Town Centre precinct, employing 20.0% of workers in the precinct. Construction typically has a high number of businesses; however, this is especially evident in Brighton with 26.7% of total businesses in 2018 being associated with the construction sector, a significantly higher proportion than Greater Hobart at 16.2%. In 2016 construction had a self-sufficiency rate of 54.4% meaning over half of the local industry's employees live within Brighton potentially due to the high proportion of people who own and manage their own construction businesses from their own residence.

Table 2.2. Proportion of Brighton Employment, Construction, 2016

Precinct	Proportion of Brighton Employment	Number of Employees
Bridgewater Retail and Services Hub	10.9%	44
Bridgewater Industrial Estate	20.7%	83
Brighton Town Centre	44.6%	180
Elsewhere in Brighton	23.8%	96
Total	**100.0%**	**403**

Source: ABS (2017a).

2.3.3 Health Care and Social Assistance

Health care and social assistance is a strong industry across Greater Hobart and is the third highest contributor to IVA in Brighton in 2017-18. It accounts for 11.6% of total IVA whilst also being the fourth largest employer in Brighton, employing 10.4% of workers in the region. A large proportion of people working in health care and social assistance work outside of the three precincts but within the LGA at 48.5%. Almost half the people that work in health care and social assistance in Brighton also live in Brighton with a self-sufficiency rate of 44.9%.

Table 2.3. Proportion of Brighton Employment, Health Care and Social Assistance, 2016

Precinct	Proportion of Brighton Employment	Number of Employees
Bridgewater Retail and Services Hub	24.4%	67
Bridgewater Industrial Estate	0.0%	0
Brighton Town Centre	27.1%	75
Elsewhere in Brighton	48.5%	134
Total	**100.0%**	**275**

Source: ABS (2017a).

2.4 TOURISM

In 2018, Brighton recorded total visitation of 84,000 people (from within Tasmania, interstate or international) TRA, 2019a, TRA, 2019b).

In 2018, Brighton had approximately 2,000 visitors from outside of Tasmania (interstate and international) whilst 82,000 were from within Tasmania. This was the smallest number of Interstate visitors in Greater Hobart. (TRA, 2019a, TRA, 2019b). Due to the small number of visitors of smaller regions visitation numbers can have a high level of volatility, however 2017 and 2018 have seen a significantly higher number of visitors to the LGA than in previous years. This has been driven by more day trip visitors coming to Brighton with daytrip visitors accounting for 91.0% of all visitors in 2018, whilst domestic overnight visitors accounted for 7.9% and international with 1.1%. As a result of the low number of visitors to Brighton, accommodation and food services is a small sector, being the 11th largest industry by GVA. In 2018, the main reason for people visiting Brighton was to visit friends and relatives with 76.5% of people coming for this reason. Following this was for a holiday with 22.4% of visitors.

2.5 HOUSING

Approximately 70% of households in Brighton were a one family household, with the next highest category being lone person households, accounting for 20.9% of households. A high proportion of dwellings in Brighton are a separate house accounting for 88.6% of dwellings in 2016, followed by flat or apartments at 9.2% of the total housing stock.

Brighton recorded a lower household income than Greater Hobart in 2016, with average household income of $1,341 per week compared to $1,576 per week in Greater Hobart. Housing stress is a strain on local households in Brighton, with 35.0% of rented dwellings in rental stress and 7.7% of mortgaged dwellings in mortgage stress[1]. Rental stress and mortgage stress in Brighton are both considerably higher than Greater Hobart (30.4% and 5.8% respectively) potentially relating to the significantly higher levels of unemployment in Brighton.

The average property price in Brighton in 2016 was $261,000 (35.4% below the average for Greater Hobart) suggesting the LGA had a mean multiple of 3.7[2]. This is lower, and more affordable, than Greater Hobart (at 4.9). Property prices have remained relatively stable since 2011, growing by just 0.1% whilst the mean multiple has decreased from 4.3 in 2011. Whilst the level of affordability may not be as problematic for Brighton as other municipalities within Greater Hobart, the high levels of unemployment and low levels of household incomes suggest considerable barriers to home ownership for local residents.

2.6 EDUCATIONAL ATTAINMENT

Educational attainment in Brighton is low. In 2016, approximately 31.8% of the resident population aged over 15 years had completed high school, compared to 52.2% of the Greater Hobart population. Approximately a quarter

[1] Mortgage and rental stress is defined as low income households (bottom 40% of income distribution) who spend more than 30% of income on mortgage (or rent) repayments, as a proportion of mortgaged (or rented) private dwellings

[2] The mean multiple is used to indicate the housing affordability of the LGA and is the ratio between the mean house price by the mean gross annual household income. A mean multiple of 3.1 to 4.0 is considered to be moderately unaffordable according to the International Housing Affordability Survey (Demographia, 2019).

of the population aged over 15 years had a trade qualification, suggesting local residents have a tendency to leave school early and enter into a trade or undertake a traineeship.

This is likely due to the level of construction and manufacturing that occurs within the LGA due to the Bridgewater Industrial Estate as well as significant construction employment in Brighton Town Centre.

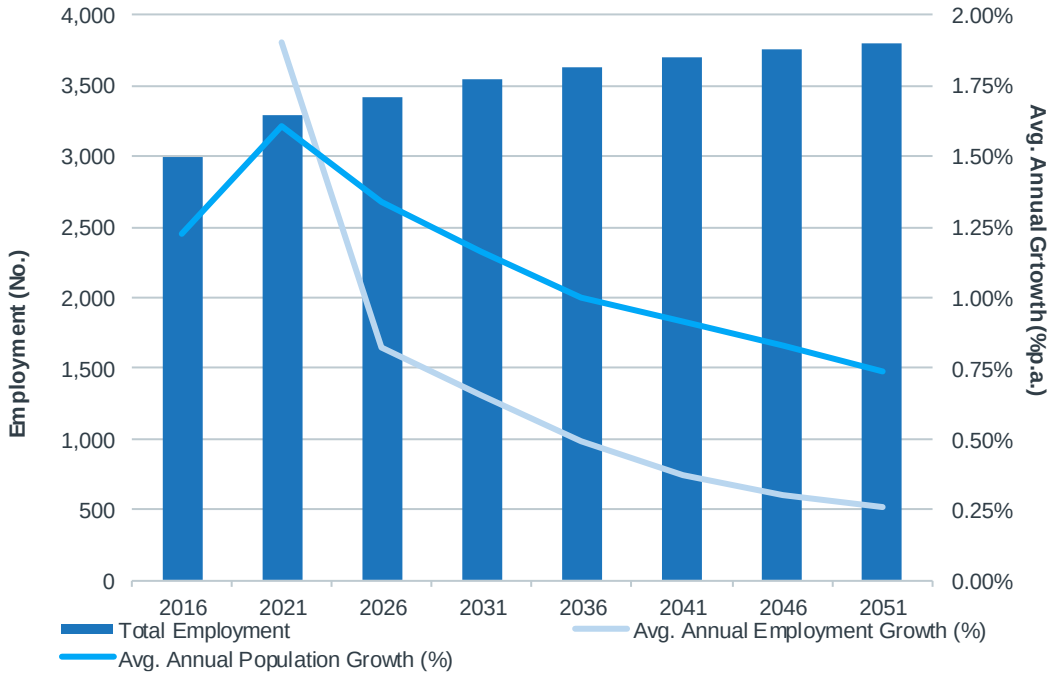
3. POTENTIAL ECONOMIC FUTURE

The following chapter outlines the potential employment outlook for Brighton, without targeted economic development activities. The methodology used for these estimates is provided in **Appendix D**.

3.1 TOTAL EMPLOYMENT

Total employment in Brighton is estimated to increase by an average annual rate of 0.7% per annum between 2016 and 2051. Incremental growth over the period is anticipated to slow from 1.9% per annum in the initial period to 2021, driven by significant economic volatility in this period already between 2016 and 2018 at the state level, to 0.4% per annum in the period between 2046 and 2051. This growth path is consistent with current expectations for population growth over the estimation period (refer to Figure 3.1).

Figure 3.1. Estimated Employment, Brighton, 2016 to 2051

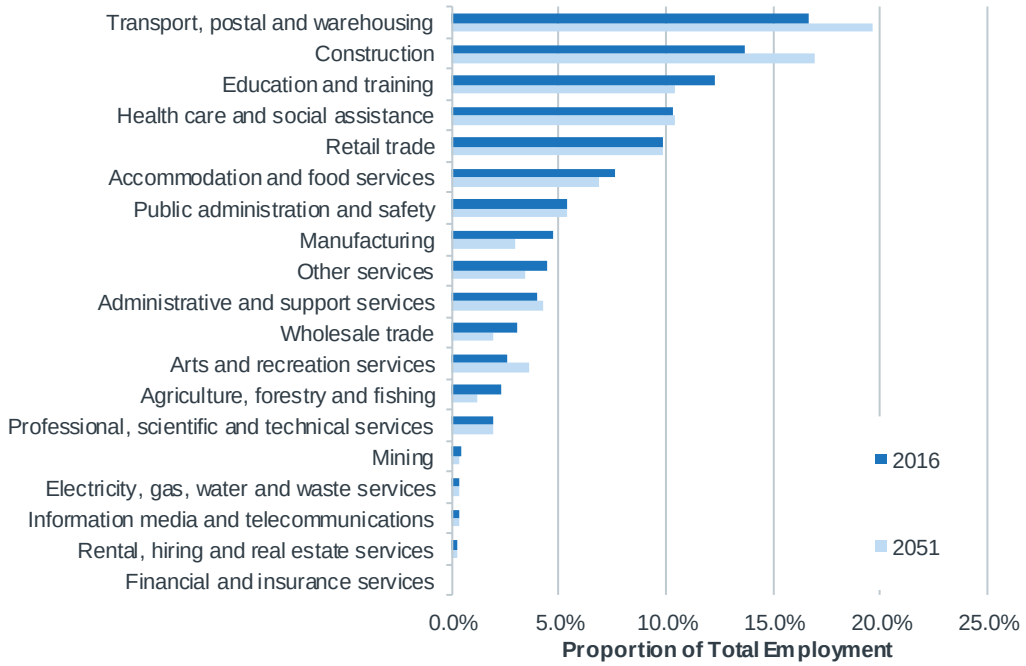


Source: ABS (2017a), DOTF (2019), AEC

3.2 EMPLOYMENT BY INDUSTRY

Key growth sectors for the economy between 2016 and 2051 are estimated to be arts and recreation services (1.7% per annum), construction (1.3% per annum) and transport, postal and warehousing (1.2% per annum). The structure of the economy is anticipated to remain the same with transport, postal and warehousing continuing to be the largest industry employer in Brighton.

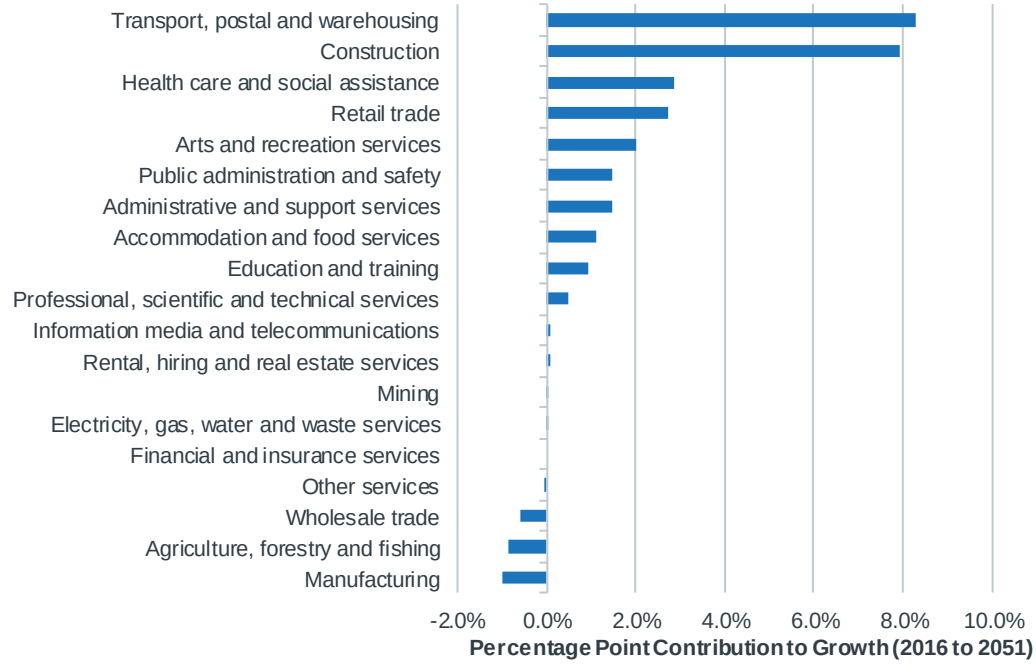
Figure 3.2. Estimated Employment by Industry, Brighton, 2016 to 2051



Source: ABS (2017a), AEC

Employment growth in Brighton is estimated to be primarily sourced from transport, postal and warehousing, construction and health care and social assistance. Conversely, negative growth (and, indeed, declines in employment) are estimated to be focused on manufacturing, agriculture, forestry and fishing and wholesale trade.

Figure 3.3. Estimated Contribution to Growth, Brighton, 2016 to 2051



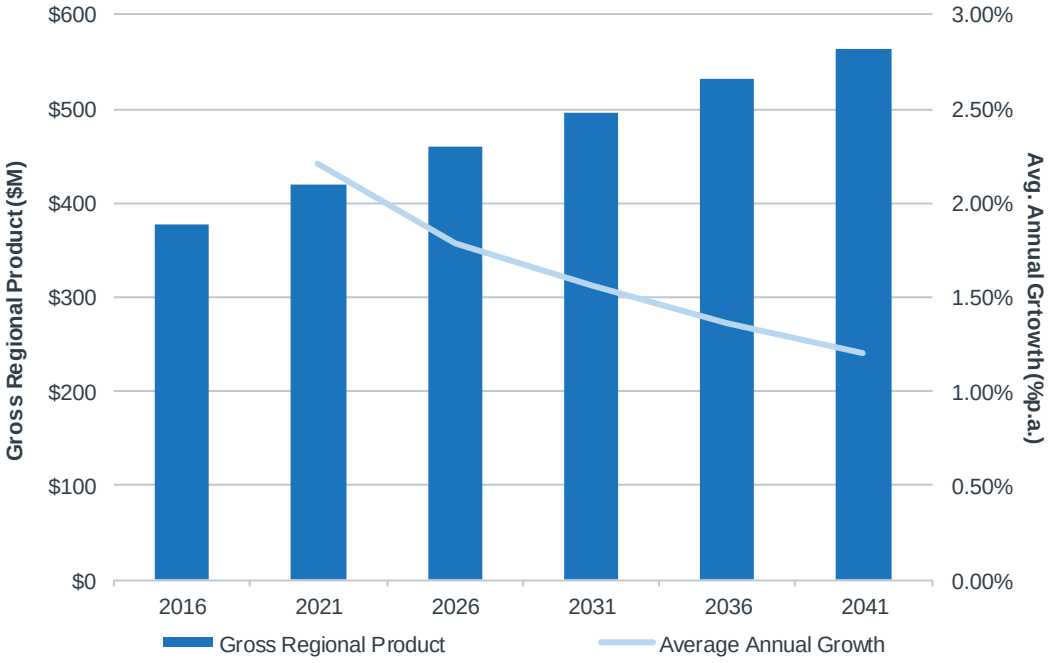
Source: ABS (2017a), AEC

3.3 GROSS REGIONAL PRODUCT

Gross Regional Product (GRP) in Brighton is expected to grow to approximately $9.9 billion in 2041. From 2016 to 2041 economic growth is anticipated to grow at an average annual rate of 1.6% per annum. Growth is expected to be fastest in the near-term future averaging annual growth of 2.1% from 2016 to 2021, including the strong growth

recorded in 2017-18, before declining to be 1.2% annually between 2036 to 2041. Key sectors contributing to the estimated economic expansion of the Brighton economy include construction, health care and social assistance and transport, postal and warehousing.

Figure 3.4. Estimated Gross Regional Product, Brighton, 2016 to 2051



Source: ABS (2017a), DOTF (2019), AEC

4. COMPETITIVE ASSESSMENT

This section outlines the potential opportunities for Brighton using location quotients, cluster mapping, import/export analysis and assessing the key assets within the region.

4.1 LOCATION QUOTIENTS

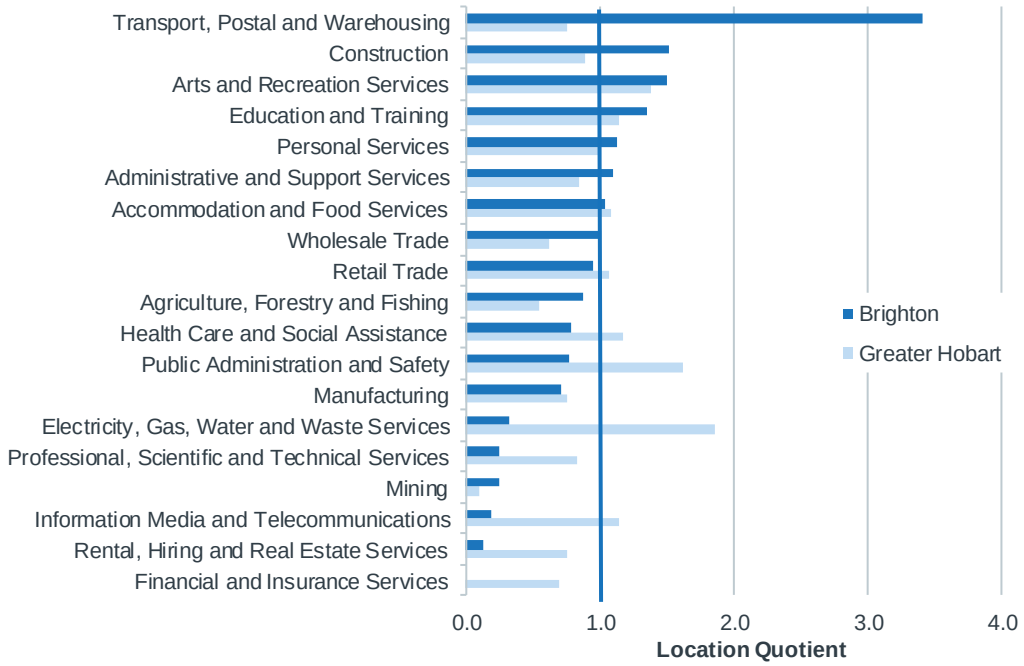
To demonstrate the specialisation of the economy, location quotients based on employment have been calculated. The location quotients demonstrate the degree to which a local or regional economy is specialised by examining the proportion of employment (by industry sub-sector) compared to a larger economy (Australian economy). Location quotients can be used to indicate strengths and weaknesses of a local or regional economy (i.e. identify its natural competitive advantage).

For this project, the analysis has compared the location quotients of Brighton economy with those of Greater Hobart (both separately calculated relative to the Australian economy). A location quotient of "1" means that Brighton has an equal share of employment (compared to Australia) for a specific industry sector, thus no potential advantage either way. A location quotient above "1" indicates a specialisation of labour and therefore an area of potential competitive advantage. If the location quotient is below "1", the area has a weakness in this particular industry sector.

An assessment of location quotients at the 1-Digit ANZSIC level suggests Brighton has labour specialisations in the industries of:

- Transport, Postal and Warehousing (LQ = 3.4)
- Construction (LQ = 1.5)
- Arts and Recreation Services (LQ = 1.5)
- Education and Training (LQ = 1.3)
- Personal Services (LQ = 1.1)
- Administrative and Support Services (LQ = 1.1)
- Accommodation and Food Services (LQ = 1.0)
- Wholesale Trade (LQ = 1.0)
- Retail Trade (LQ = 1.0).

Figure 4.1. Location Quotients, 1 Digit ANZSIC, Brighton and Greater Hobart

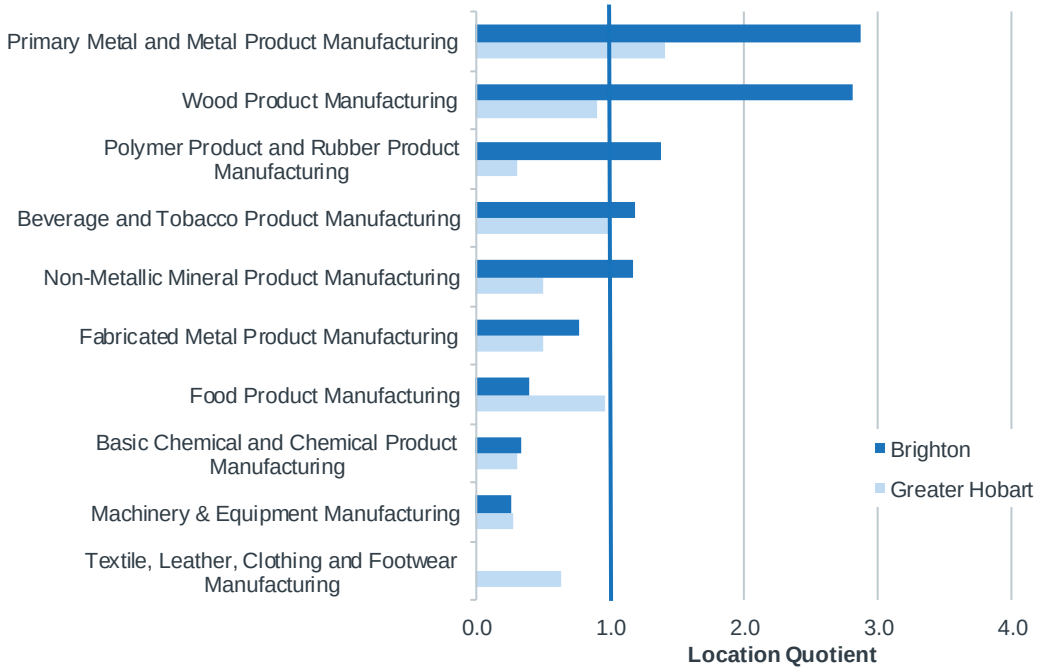


Source: ABS (2017a).

An assessment of location quotients for manufacturing at the 2-Digit ANZSIC level suggests Brighton has labour specialisations in the industries of:

- Primary Metal and Metal Product Manufacturing (LQ = 2.9)
- Wood Product Manufacturing (LQ = 2.8)
- Polymer Product and Rubber Product Manufacturing (LQ = 1.4)
- Beverage and Tobacco Product Manufacturing (LQ = 1.2)
- Non-Metallic Mineral Product Manufacturing (LQ = 1.2).

Figure 4.2. Specialisation Manufacturing, 2-Digit ANZSIC, Brighton



Source: ABS (2017a).

Table 4.1. Location Quotients, 1 Digit ANZSIC (Ranked for Greater Hobart Prevalence)

Industry	Brighton	Greater Hobart
Transport, Postal and Warehousing	3.4	0.8
Construction	1.5	0.9
Arts and Recreation Services	1.5	1.4
Education and Training	1.3	1.1
Personal Services	1.1	1.0
Administrative and Support Services	1.1	0.8
Accommodation and Food Services	1.0	1.1
Wholesale Trade	1.0	0.6
Retail Trade	1.0	1.1
Agriculture, Forestry and Fishing	0.9	0.5
Health Care and Social Assistance	0.8	1.2
Public Administration and Safety	0.8	1.6
Manufacturing	0.7	0.8
Electricity, Gas, Water and Waste Services	0.3	1.9
Professional, Scientific and Technical Services	0.3	0.8
Mining	0.2	0.1
Information Media and Telecommunications	0.2	1.1
Rental, Hiring and Real Estate Services	0.1	0.8
Financial and Insurance Services	0.0	0.7

Source: ABS (2017a).

4.2 CLUSTER MAPPING

Cluster mapping builds on the location quotient analysis by portraying the regional location quotients against Tasmania industry estimated employment growth over time (from 2017-18 to 2030-31). By incorporating industry growth, cluster mapping allows for the identification of growth opportunities in specific industry sectors, where a natural competitive advantage already exists against a backdrop of an expanding/ growing sector State-wide.

Industry clusters located above the "1" on the vertical axis indicate an existing industry concentration (strength or competitive advantage, as discussed previously) within the region being examined. The Tasmania industry average annual employment growth estimate for 2017-18 to 2030-31 (AEC, unpublished b) is plotted along the horizontal axis, with 0% average annual growth over the period creating a midline. The further to the right, along this horizontal axis, the faster the industry is expected to expand. Similarly, the farther to the left of the zero percent midline, the faster it is expected to shed jobs during this period. The size of the cluster (circle) in the map demonstrates the size of the local workforce in that industry sector locally.

Industries which are located in the Well-Represented/High Growth section of the cluster map are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience strong (above average) average annual employment growth in Tasmania. These sectors should be pursued for economic development activities, as they are likely to experience significant growth in coming years. The industries located in this section for Brighton are:

- Construction (LQ = 1.5, Growth Expectation = 1.3%)
- Arts and Recreation Services (LQ = 1.5, Growth Expectation = 1.3%)
- Administrative and Support Services (LQ = 1.1, Growth Expectation = 1.0%)
- Accommodation and Food Services (LQ = 1.0, Growth Expectation = 1.0%).

Industries which are located in the Under-Represented/High Growth section of the cluster map are industries which don't benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience strong (above average) average annual employment growth in Tasmania between 2018 and 2031. These sectors should be investigated further, where appropriate, to determine their potential to be targeted for economic development activities as they are may perform well in the coming years if local supply chains and support are available. Industries located in this section for Brighton are:

- Health Care and Social Assistance (LQ = 0.8, Growth Expectation = 1.5%)
- Retail Trade (LQ = 1.0, Growth Expectation = 0.7%)
- Professional, Scientific and Technical Services (LQ = 0.3, Growth Expectation = 1.4%)
- Public Administration and Safety (LQ = 0.8, Growth Expectation = 0.7%)
- Rental, Hiring and Real Estate Services (LQ = 0.1, Growth Expectation = 1.2%)
- Information Media and Telecommunications (LQ = 0.2, Growth Expectation = 0.5%).

Industries which are located in the Well-Represented/Moderate Growth section of the cluster map are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience positive, but below average, average annual employment growth in Tasmania. These sectors could be considered for economic development activities, particularly if they are interconnected with strong-growth sectors of the economy. Industries located in this section for Brighton are:

- Transport, Postal and Warehousing (LQ = 3.4, Growth Expectation = 0.4%)
- Education and Training (LQ = 1.3, Growth Expectation = 0.3%).

Industries which are located in the Under-Represented/Moderate Growth section of the cluster map are industries which do not currently benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience positive, but below-average, average annual employment growth in Tasmania between 2018 and 2031.

These sectors could be investigated further, where appropriate, to determine their potential to be targeted for economic development activities. Industries located in this section for Brighton are:

- Electricity, Gas, Water and Waste Services (LQ = 0.3, Growth Expectation = 0.3%)
- Mining (LQ = 0.2, Growth Expectation = 0.3%).

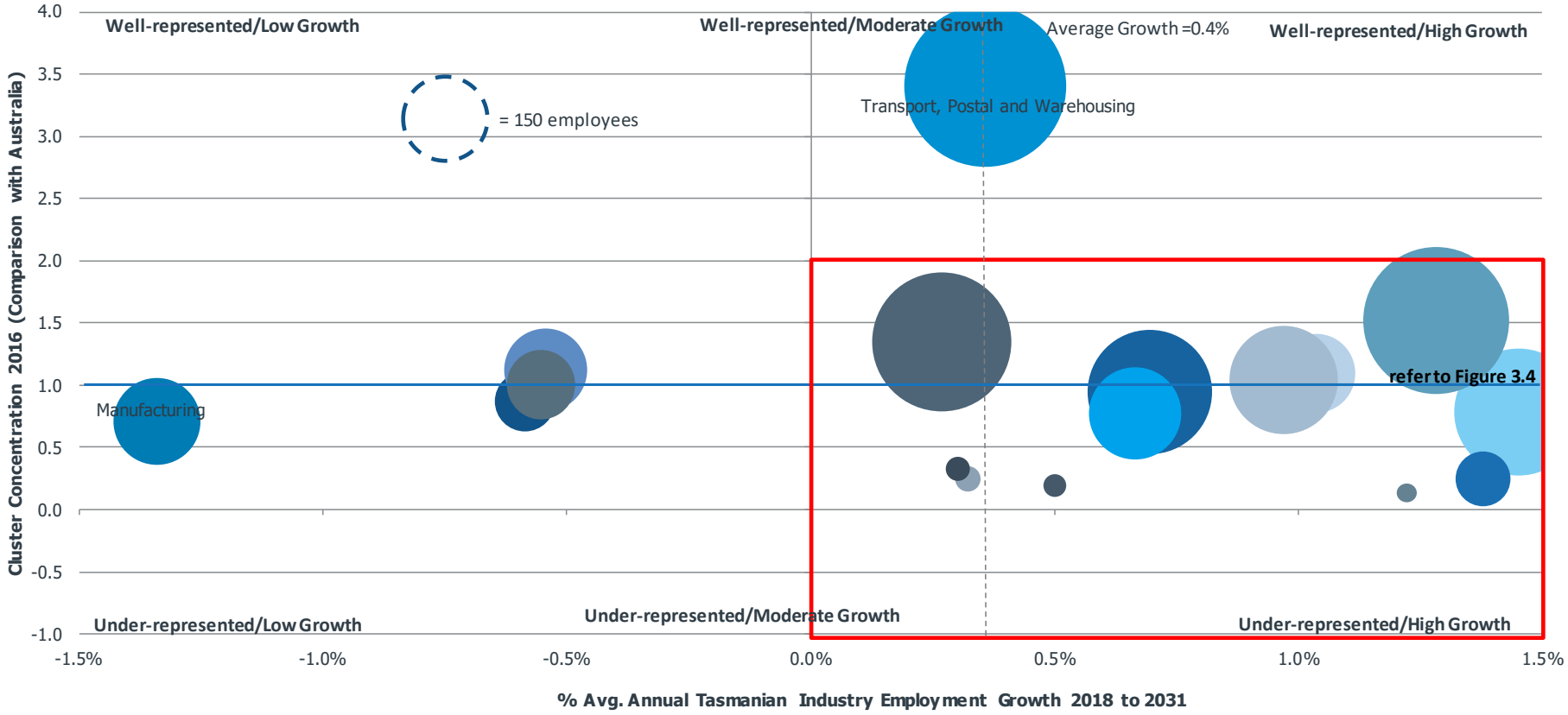
Industries which are located in the Well-Represented/ Low Growth section of the cluster map are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) but are anticipated to experience negative average annual growth in Tasmania between 2016 and 2026. Depending on the specific local factors at play for these sectors, they may require economic development support to guide them through a difficult macro-growth phase. In some instances, if local factors are extremely strong, these sectors could benefit from investment attraction activities. Industries located in this section for Brighton are:

- Personal Services (LQ = 1.1, Growth Expectation = -0.5%)
- Wholesale Trade (LQ = 1.0, Growth Expectation = -0.6%).

Industries which are located in the Under-Represented/ Low Growth section of the cluster map are industries which do not benefit from local labour specialisation (i.e. an LQ below 1.0) and are anticipated to experience negative average annual growth in Tasmania between 2016 and 2026. These industries may be targeted for economic development if there is expectations of a new project or development that will significantly affect the region. Industries located in this section for Brighton are:

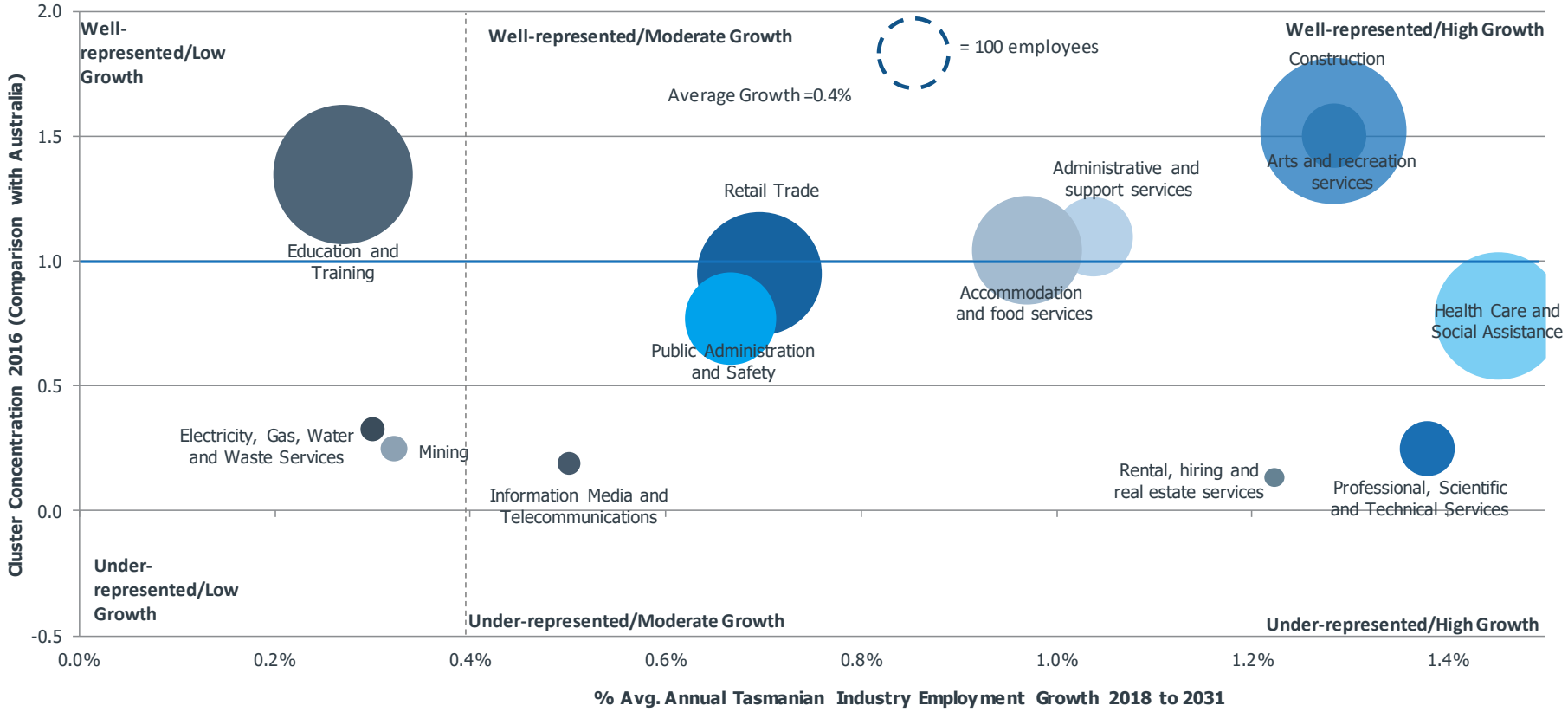
- Agriculture, Forestry and Fishing (LQ = 0.9, Growth Expectation = -0.6%)
- Financial and Insurance Services (LQ = 0.0, Growth Expectation = -0.3%)
- Manufacturing (LQ = 0.7, Growth Expectation = -1.3%).

Figure 4.3. Cluster Map, 1 Digit ANZSIC, Brighton



Source: ABS (2017a). AEC (unpublished[b]).

Figure 4.4. Cluster Map, 1 Digit ANZSIC, Brighton, Amended Axis



Source: ABS (2017a). AEC (unpublished[b]).

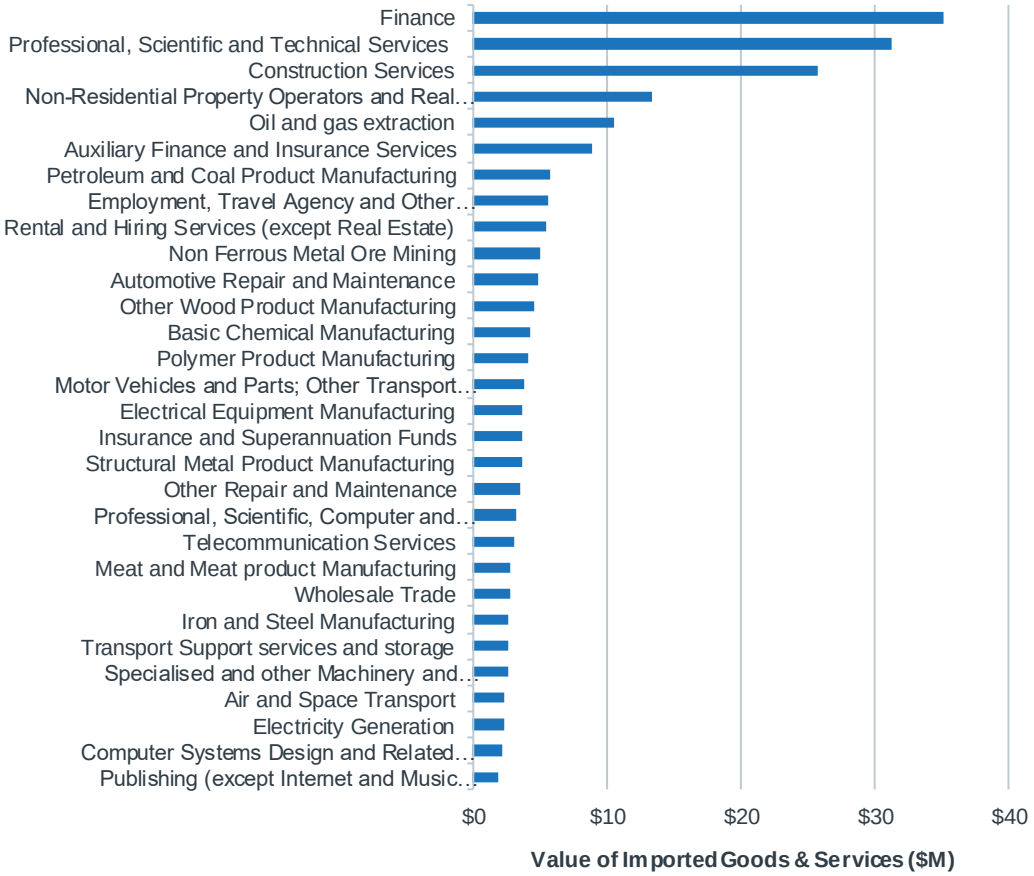
4.3 IMPORT/ EXPORT ANALYSIS

Prominent imports into a region can represent opportunities, where skills and labour can be easily sourced. This could improve local industry supply chains and provide additional job opportunities for locals.

In this assessment, imports and exports have been identified through analysis of localised transaction table(s). Imports are defined as purchases from local businesses, government or population which are undertaken outside the Brighton boundary. Similarly, purchases from Brighton businesses by businesses, government or population from outside Brighton are identified as exports.

In 2014-15, an estimated $245 million worth of imports were imported into Brighton by local businesses. The key import into Brighton was finance, at $35.2 million which is common across the municipalities in Greater Hobart. Professional, scientific and technical services was the second largest import followed by construction services.

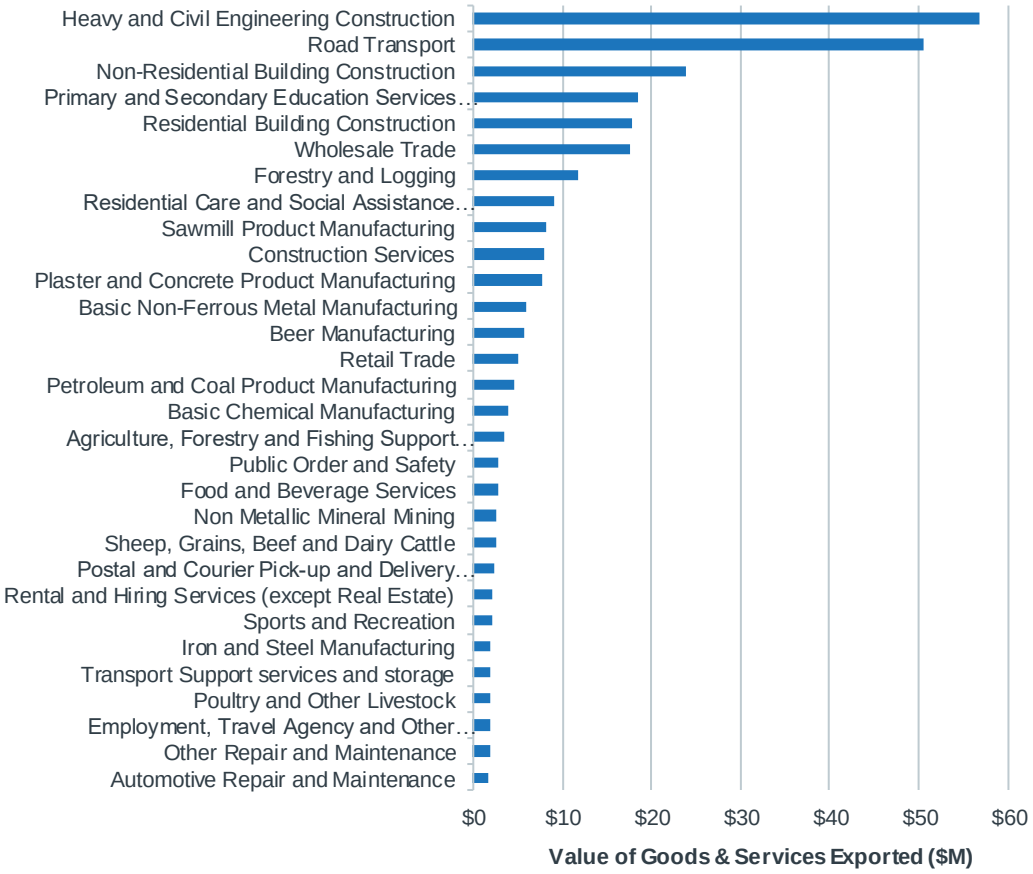
Figure 4.5. Imported Goods and Services, 2014-15



Source: ABS (2012), ABS (2017b).

In 2014-15, an estimated $469 million worth of exports left from Brighton. The key export from the region was heavy and civil engineering construction at $57 million or 12.1% of total exports. The second most prominent export in Brighton was road transport at $50.6 million.

Figure 4.6. Exported Goods and Services, 2014-15



Source: ABS (2012), ABS (2017b).

4.4 STRATEGIC ASSETS

Table 4.2. Strategic Assets

Strategic Asset	Location	Description
Hard Infrastructure		
Water Supply (domestic and irrigation)	Greater Hobart	There is a significant water irrigation network in Greater Hobart that feeds into agricultural lands.
Tourism Attractions		
Heritage Areas and History	Greater Hobart	Hobart is Australia's second oldest city and has significant history as one of the oldest colonies in Australia. These sites include world heritage convict sites such as Port Arthur historic site, Hobart Town Hall on Macquarie Street and historic waterfront warehouses.
Natural Assets		
The River Derwent	Greater Hobart	The River Derwent travels through Hobart from the Central Highlands at Lake St Clair before ending into Storm Bay. Agriculture, forestry, hydropower generation and fish hatcheries dominate catchment land use. The Derwent is also an important source of water for irrigation and water supply. Most of Hobart's water supply is taken from the lower River Derwent. Nearly 40% of Tasmania's population lives around the estuary's margins and the Derwent is widely used for recreation, boating, recreational fishing, marine transportation and industry.
Paddock to Plate Restaurants	Greater Hobart	There are many paddock to plate restaurants in Greater Hobart, providing a link between the region's agricultural areas, local residents and tourists.

Strategic Asset	Location	Description
Soft Infrastructure		
People and Service	Greater Hobart	The service sector of Hobart provides and high level of service to tourists and residents. This is a benefit to all visitors and improves the likelihood of positive visitor experiences and repeat visitation.
Industry Specific Assets		
Brighton Transport Hub	Brighton	The Brighton Transport Hub is critical to road, rail and shipping. It is recognised as very significant for Southern Tasmania, and influential in terms of where industries should be located.
TasTAFE	Greater Hobart	TasTAFE is the main provider of education and training services within Tasmania. It has multiple campuses in Tasmania and offers a variety of courses for students. It is run by the Tasmanian State Government and employs a significant proportion of people across Greater Hobart.
Major Manufacturers – Nyrstar Norske Skog, Incat.	Greater Hobart	There are significant manufacturers within Greater Hobart and specifically in Brighton with Norske Skog.
Assets with Future Potential		
Rail Corridor	Greater Hobart	The former rail corridor between Hobart and Brighton remains in place. There is an opportunity to activate the corridor for mixed uses.

4.5 INNOVATION ASSETS

4.5.1 Employment Densities

The highest employment density was in the Bridgewater Retail and Services Hub precinct having 282 workers per 1km^2. Employment density is low in the Bridgewater Industrial Estate due to a small proportion of the area being used for employment.

4.5.2 Residential Density

Residential densities are highest surrounding the River Derwent and closest to Midland Highway which crosses to Glenorchy. Low residential densities are consistent with the housing profile of the municipality, which is primarily comprised of detached dwellings.

4.5.3 Innovation & Clusters

There is clustering in Brighton in the Transport and Logistics hub with companies such as Toll Holdings opening headquarters in the region.

4.5.4 Skilled Workers

Bridgewater Industrial estate has a lower proportion of skilled workers than both Bridgewater Retail and Services Hub and Brighton Town Centre. Bridgewater industrial estate has 27.8% of its workers being skilled whilst Bridgewater Retail and Services Hub has 39.5% and the town centre has 47.0% of its workers being skilled.[3]

[3] Skilled workers are defined as having a skill level of 1-3 according to the Australian Bureau of Statistics definition (ABS, 2013)

4.6 PRELIMINARY OPPORTUNITY ASSESSMENT

Preliminary economic opportunities identified through desktop analysis **(Section 4)** as well as consultations with key stakeholders are outlined in the table below. Council's role in each opportunity is important. Not all opportunities are solely the responsibility of the Councils or their economic development teams. However, Councils can play a role in their development and pursuance. Details of the roles of Council are outlined in **Appendix E**.

Table 4.3. Opportunities for Brighton

Opportunity Name	Opportunity Detail	Council's Role	Rationale
Overarching Opportunities for All LGAs in Greater Hobart			
Council Integration and Cooperation	Opportunities for Council co-ordination may include resources sharing and advocacy with state and federal government.	Provider of Services	• As a capital city area, there are opportunities to align activities to support issues impacting on the region as a whole.
Public Transport	There are opportunities for Councils to consider increasing the range and reach of public transport options for Greater Hobart. The potential role of the Northern Suburbs Transit Corridor could be further investigated.	Advocacy/ Facilitation/ Stakeholder	• Consultations in Greater Hobart highlighted a strain on public transport systems. Addressing this strain has potential to improve livability of Greater Hobart.
Education and Skills	Whilst education provision is not a core function of Council's role, Councils can play an advocacy role in ensuring the connection of youths with key education institutions and local businesses. Councils can also, through their usual interactions with local businesses monitor skills shortages in the region.	Advocacy/ Stakeholder	• Existing educational attainment in Brighton is low, with 31.0% of residents aged over 15 years having completed high school. • Greater Hobart (and Brighton) have labour specialisations in education and training, with LQs above 1.0.
Planning and Strategic Development	Opportunities for strategic planning could focus on supporting higher-density development, provision of affordable housing and broader Council co-ordination.	Planning and Regulation/ Advocacy	• Greater Hobart records a high prevalence of low density housing with 82.4% of houses being separate dwellings. • Housing affordability is problematic in Brighton with high levels of rental stress and mortgage stress.
Conference Facilities	Continue to monitor demand for a conference facility in Hobart.	Advocacy/ Stakeholder	• Greater Hobart does not currently have any facilities to accommodate more than 1,300 persons (banquet-style). • The provision of a conference facility could assist in increasing tourism visitation and visitor expenditure within Greater Hobart.

Opportunity Name	Opportunity Detail	Council's Role	Rationale
Remote Working	Promote Greater Hobart as a location to live with an opportunity to work anywhere.	Facilitation	• Remote working is a growing macro trend. Remote working can provide local residents with greater options to choose where they live based on livability rather than access to employment.
Industry Opportunities for Brighton LGA			
Health Care & Social Assistance	Opportunities for health care and social assistance may include advocacy for increased service provision in terms of aged care or general health care provision. It is essential that provision of services meets the needs of the growing population.	Stakeholder/ Advocacy	• Health care is currently underrepresented with an LQ below 1.0. • Strong anticipated population growth in Brighton in the projection period is likely to support demand for health care.
Green and Renewable Economy	Opportunities for the green economy could include investigation of renewable energy sources, educating residents to reduce their consumption practices, or attracting businesses operating within the circular economy.	Facilitation	• Globally, there is increased concern about the environment and the impact of human lifestyle on the earth. • Tasmania has a recognised brand as a clean environment with clean air which could be leveraged for this opportunity. • Brighton has available land to support the development.
Food & Beverage Manufacturing	Food and beverage product manufacturing is a key manufacturing industry that can be expanded, particularly in niche farm gate product areas.	Facilitation	• Tasmania is well regarded nationally for its niche food and beverage products. • Brighton has existing labour specialisation in beverage and tobacco manufacturing as well as access to agricultural inputs.
Transport, Postal and Warehousing	There is an opportunity for existing operations to be relocated to outer areas to increase available land supply for other purposes.	Planning and Regulation/ Facilitation	• Brighton has a strong existing sector with an LQ of 3.4. The sector is anticipated to expand at the state level, suggesting a strong local environment for the sector.
Agriculture, Forestry and Fishing & Supply Chains	Opportunities for this sector may include expanding existing agricultural activities in Greater Hobart with irrigation schemes and increasing production of existing commodities.	Planning and Regulation/ Facilitation	• Brighton has labour specialisations in aquaculture and agriculture, as well as a downstream processing sector. • As population expands, demand for food is also likely to increase, supporting expansion of the sector.
Information Technology	There are opportunities for the attraction of small-scale IT businesses to Greater Hobart.	Facilitation	• Increased remote working tendencies mean people can live in Brighton but work for anyone (as long as there is adequate bandwidth).

4.7 KEY STRATEGIC PARTNERS

As outlined in 4.6, the development and delivery of the identified opportunities will require coordinated efforts with a number of key partners. These partners are likely to include, but not be limited to various State and Federal Government agencies, key industry representatives, education providers and tourism development agencies.

5. PRIORITISED ECONOMIC OPPORTUNITIES

Economic opportunities identified through the desktop assessment and consultation phases of the project (outlined in 4.6) were selected as prioritised opportunities by excluding opportunities which are a component of the Hobart City Deal (except where they were anticipated to be a key local economic development activity). Greater Hobart Area Councils are already coordinating on these important projects and should continue to do so. These opportunities included:

- Support expansion of the Hobart Airport and broader precinct (Clarence)
- Expanding the local Antarctic and Southern Ocean industry (Hobart and Kingborough)
- Replacing the Bridgewater Bridge (Glenorchy and Brighton)
- Reducing congestion
- Improving the supply of affordable housing
- Activating the Northern Suburbs Transit Corridor (Hobart, Glenorchy and Brighton)
- Coordinating activities through the Greater Hobart Act.

Economic development activities to activate economic opportunities are aimed at increasing business investment, jobs and economic activity within Greater Hobart. Pursuance of economic opportunities will be achieved through the undertaking of investment decisions which will be informed through:

- Planning guidelines
- Marketing collateral
- Business Case/ Needs Assessment
- Feasibility.

The economic opportunities outlined below are just the starting point from which economic development strategies and action planning can be undertaken. Achieving these economic development opportunities, from Council's perspective, would include:

- Documentation to support the raising of funds
- Co-ordination and collaboration with key stakeholders and other Councils
- Develop appropriate investment attraction collateral.

Each of the identified opportunities are outlined in greater detail in Sections 5.1 to 5.7, below. Where possible, the broad, critical actions required to achieve these economic development opportunities have been outlined for consideration by Councils in their economic development activities.

5.1 INTENSIFY PRIMARY RESOURCE PRODUCTION & VALUE ADDING SUPPLY CHAINS

Detail	Description
Rationale & Key Focus Areas	Water and land-based agricultural activities can be intensified locally, increasing local production (including areas surrounding the defined Greater Hobart catchment) and improving local supply chains (both business to business and business to consumer).
Timing of Development	Medium Term
Council's Role	Planning and Regulation, Facilitation
Strategic Partner(s)	Potential strategic partners include (but are not limited to) local industry participants and associations.
Required Pre-Existing Conditions	Appropriately zoned land in Brighton.
Complexity	Low to Medium

Potential Action Areas	• Ensure appropriately zoned land is available in required areas to accommodate intensification of agricultural activities.
	• Facilitate an Agriculture Development Forum to:
	  ○ Discuss and encourage use of irrigation practises in farming.
	  ○ Discover from local producers what issues / perceived opportunities may currently exist in produce / product development.
	  ○ Encourage collaboration between the agricultural sector, transport and logistics sector and Hobart Airport to identify opportunities to leverage the Hobart Airport expansion.
	  ○ Encourage collaboration between the agricultural sector, small-scale niche market manufacturers and the local accommodation and food services sector to encourage collaboration and increased use of local produce in local restaurants.

5.2 PROVIDE KEY SERVICES AND INFRASTRUCTURE TO ATTRACT AND RETAIN POPULATION

Detail	Description
Rationale & key Focus Areas	Population growth in Greater Hobart has accelerated in recent years, placing a strain on existing housing and transport infrastructure. Accommodating future population growth in Greater Hobart will require additional soft and hard infrastructure investment and attraction. Key focus areas for Brighton include: • Arts and recreation • Health care and social assistance • Administration and support services • Construction.
Timing of Development	Short, Medium and Long Term
Council's Role	Planning and Regulation, Facilitation
Strategic Partner(s)	Potential strategic partners include (but are not limited to) Housing Institute Tasmania, Property Council Tasmania, Housing Tasmania, Infrastructure Tasmania, Housing Industry Association.
Required Pre-Existing Conditions	Prevailing demand conditions to provide incentive for private sector developer interest for housing. Population demand for hard and soft infrastructure.
Complexity	Medium
Potential Action Areas	• Ensure adequate supply of serviced land for residential and business development required to facilitate anticipated population growth. • Advocate key stakeholders for investment in education and health care facilities to support existing and future population levels. • Assess the skills required by key focus areas and advocate for skills development programs to lift local skills provision to meet demand.

5.3 RELOCATION AND INTENSIFICATION OF TRANSPORT, POSTAL & WAREHOUSING TO SPECIFIC ACTIVITY NODES

Detail	Description
Rationale	The Greater Hobart Area benefits from the presence of a port, airport and significant economic activity. There is an opportunity to further leverage this activity through the expansion and relocation of transport, postal and warehousing activities to appropriate sites and undertake urban renewal on existing sites. Brighton has a large volume of land available for these uses and is able to accommodate activities which are currently located in Glenorchy. Brighton's close geographical proximity to the airport would also provide a benefit to industrial activities in the LGA.
Timing of Development	Medium Term
Council's Role	Planning and Regulation, Facilitation
Strategic Partner(s)	Potential strategic partners include (but are not limited to) local industry participants, Hobart Airport, Office of the Coordinator General.
Required Pre-Existing Conditions	Agreement and collaboration between Glenorchy and Brighton Councils regarding the incentivisation of the relocation of transport, logistics and warehousing activities from Glenorchy to Brighton. Appropriately zoned, accessible and serviced land available for transport and logistics activities in Brighton. Value capture/ sharing framework to share benefits from rezoned areas.
Complexity	Low to Medium

Potential Action Areas	• Brighton Council to ensure appropriately zoned and serviced industrial lands to accommodate increased industrial activities.
	• Brighton Council to work with Glenorchy Council to:
	  ○ Encourage transport and logistics organisations to re-locate to Brighton.
	  ○ Develop transport and logistics-specific business attraction collateral for distribution to existing and potential businesses.
	  ○ Proactively approach businesses in the Glenorchy Council municipality with identified sites/ locations for the transfer of existing businesses.
	  ○ Investigate and consider the potential of providing incentives to encourage relocation, e.g. infrastructure charges relief, or other concessions / deferred charges costs.

5.4 SUPPORT THE EMERGING INFORMATION TECHNOLOGY SECTOR

Detail	Description
Rationale & Key Focus Areas	In an increasingly 'smart' world, there are hidden technological aspects of almost all industries. There are, therefore, considerable opportunity for expansion and diversification of the information technology sector, including small-scale technology businesses (application development, game development etc). The lifestyle offering of Greater Hobart could assist in attracting these businesses to the region. There are existing, small-scale clusters of IT activity within Greater Hobart, which Brighton can potentially leverage. Encouraging collaboration and partnering within the industry and with other industries has the potential to support additional activity within the industry as well as growing Greater Hobart's reputation as a centre for technology clusters.
Timing of Development	Short to Medium Term
Council's Role	Planning and Regulation, Facilitation
Strategic Partner(s)	Potential strategic partners include (but are not limited to) local industry participants, Department of State Growth.
Required Pre-Existing Conditions	High-speed internet connectivity across municipalities. Planned and publicly known development areas. Appropriate lifestyle offering and housing to attract population working in the field.
Complexity	Medium
Potential Action Areas	• Pursue population attraction activities promoting Brighton as a location with an emerging information technology sector. Population attraction collateral should also highlight Brighton (and Greater Hobart) as an ideal location for working from home activities (enabling the attraction of sole-trading creative businesses) with a number of co-working spaces. • Identify specific locations appropriate for development into information technology sector co-working spaces to support ideas sharing and innovative thinking. • Identify black spots across Brighton and advocate key stakeholders for high-speed internet connectivity to facilitate the attraction and activation of the sector. • Engage with the existing industry to identify issues, constraints and strengths for the sector. • Host engagement sessions with the local technology sector and key industry stakeholders to assist in inter-industry partnerships and collaboration.

5.5 INCREASE LOCAL PARTICIPATION IN THE GREEN & CIRCULAR ECONOMIES

Detail	Description
Rationale & Key Focus Areas	Tasmania has a worldwide reputation as a clean, green and pristine environment. There are significant opportunities to leverage this perception and reality for Greater Hobart to increase its participation in the green and circular economies through: • Increased production of green and renewable energy (in Brighton) • Increased education of local business and residents in reducing energy consumption and the use of single-use plastic products.
Timing of Development	Medium Term
Council's Role	Planning and Regulation, Facilitation
Strategic Partner(s)	Potential strategic partners include (but are not limited to) Department of State Growth.
Required Pre-Existing Conditions	Available and appropriately zoned and buffered land. Connection points to electricity networks. Viable business model or government funding to support development.
Complexity	Moderate. Attracting investment from renewable energy providers and circular economy participants may be difficult and require considerable consultation with businesses on the mainland. Educating local businesses and households of the benefits of renewable energy (and other green practices) may involve considerable time and effort to have a marked impact on energy consumption or single-use products.

Potential Action Areas	• Develop marketing collateral to inform businesses/ households on:
	  ○ Methods for reducing energy consumption
	  ○ Alternatives to single-use plastics
	  ○ Benefits of using renewable energy sources
	  ○ State/ Federal government incentives for small-scale investment in renewable energy (e.g. rebates for solar installations)
	  ○ Facilitate business and industry seminar/forum (with appropriate speakers & advocates) to introduce concepts and encourage participation.
	• Pursue the delivery of renewable energy projects:
	  ○ Identify the land and planning requirements for supporting development of renewable energy projects
	  ○ Identify appropriate types of renewable energy projects for development in Brighton given the existing availability of land, weather conditions and supply availability
	  ○ Identify any government grants available to assist in incentivising development
	  ○ Pursue the development of these opportunities through networking with renewable energy businesses.

5.6 CONTINUE TO MONITOR THE DEMAND POTENTIAL & FEASIBILITY OF A MULTI-USE/ CONFERENCE FACILITY IN GREATER HOBART

Detail	Description
Rationale & Key Focus Areas	Hobart is the only state or territory capital that does not have the capacity or capability to host large-scale (in excess of 1,300 persons for a sit-down dinner) conferences and business events. The business conference and events sector attracts visitors both nationally and internationally and is increasingly competitive, with destination brand and desirability of visitation playing a large part in conference organiser decision making. Hobart has significant points of difference to existing centres and this may be viewed as a clear opportunity Assessment of the feasibility for a conference facility in Hobart is undergoing consideration. In addition to external visitation, as population and business activity within Greater Hobart expands, the demand profile and feasibility of the development will equally change.
Timing of Development	Short to Medium Term
Council's Role	Advocacy
Strategic Partner(s)	Potential strategic partners include (but are not limited to) the Office of the Co-ordinator General.
Required Pre-Existing Conditions	Appropriately zoned and serviced land available for development. Prevailing demand levels to support the presence of a multi-use/ conference facility. Government or private sector interest to fund the development.
Complexity	Likely will require funding support for state or Australian government as few facilities are commercially viable in their own right.
Potential Action Areas	• Continue to monitor the demand profile for a multi-use/ conference facility in Greater Hobart. • As and when demand is adequate advocate for the development of feasibility studies and demand assessments to determine the ongoing need for a facility. • Engage with convention and conference industry representatives (MICE sector, Professional Conference Organisers, Business Events Council) to understand drivers of destination choice and organiser / attended requirements.

5.7 WORK WITH PARTNERS TO HIGHLIGHT EDUCATION PATHWAYS FOR YOUTH TO INCREASE EDUCATION ASPIRATIONS AND OUTCOMES

Detail	Description
Rationale & Key Focus Areas	Educational attainment levels are low in Greater Hobart, on a national comparison and indicators show this factor is intergenerational and typically results in low familial expectations and, potentially, lower levels of youth educational aspirations. Whilst delivery of education is a state function, local Councils can play a role in advocating for the development of education pathways for students, in line with local industry requirements where skills shortages may be identified. Linking business, industry, local schools, tertiary and vocational education is an important activity that all levels of government can participate in.
Timing of Development	Can be implemented in the short term, but impacts will be recorded in the long term.
Council's Role	Advocacy
Strategic Partner(s)	Potential strategic partners include (but are not limited to) Skills Tasmania, University of Tasmania, TAFE Tasmania and local schools.
Required Pre-Existing Conditions	Collaboration between education providers, local Council and State Education System. Industry engagement and collaboration with education facilities. Government or private sector interest to assist in deploying and funding initiatives and programs.
Complexity	The opportunity has a relatively high complexity due to it being a state-wide issue. Though the opportunity will involve a number of stakeholders, the opportunity can leverage several existing or preceding education pathways programs.
Potential Action Areas	• Maintain/ create links with skills development pathway providers to ensure programs and activities are rolled out within the catchment. • Engage with representative industry and business network groups (e.g. chambers) to discuss perceptions of skills requirements and indication of shortages – there needs to be a clear link between requirements and delivery • Where appropriate, facilitate direct engagement between industry and higher education facilities with an aim to foster greater student/ industry engagement and the delivery of curriculum to meet industry needs.

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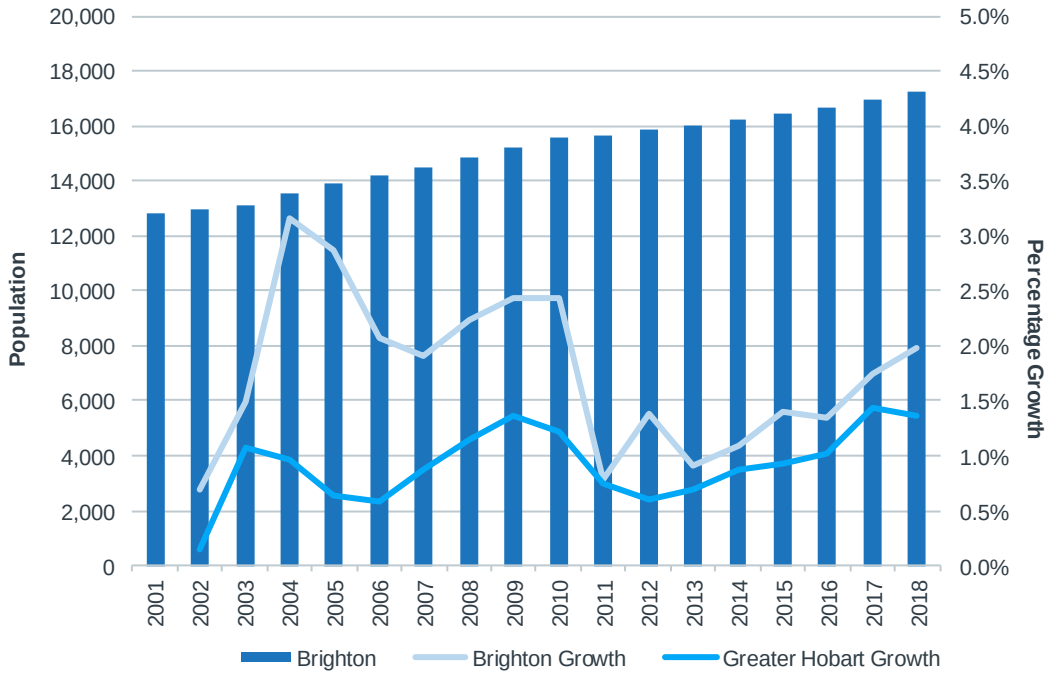
APPENDIX A: SOCIO-ECONOMIC DETAILS

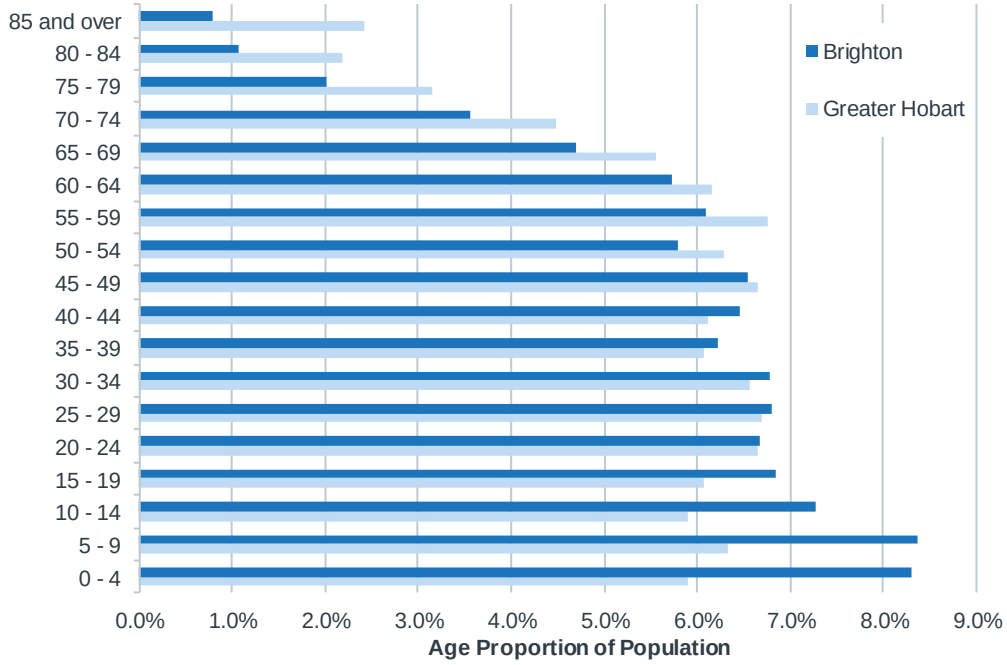
POPULATION

A. 1. Population and Growth



Source: ABS (2019a).

Figure A. 2. Population by Age, 2017



Source: ABS (2018a).

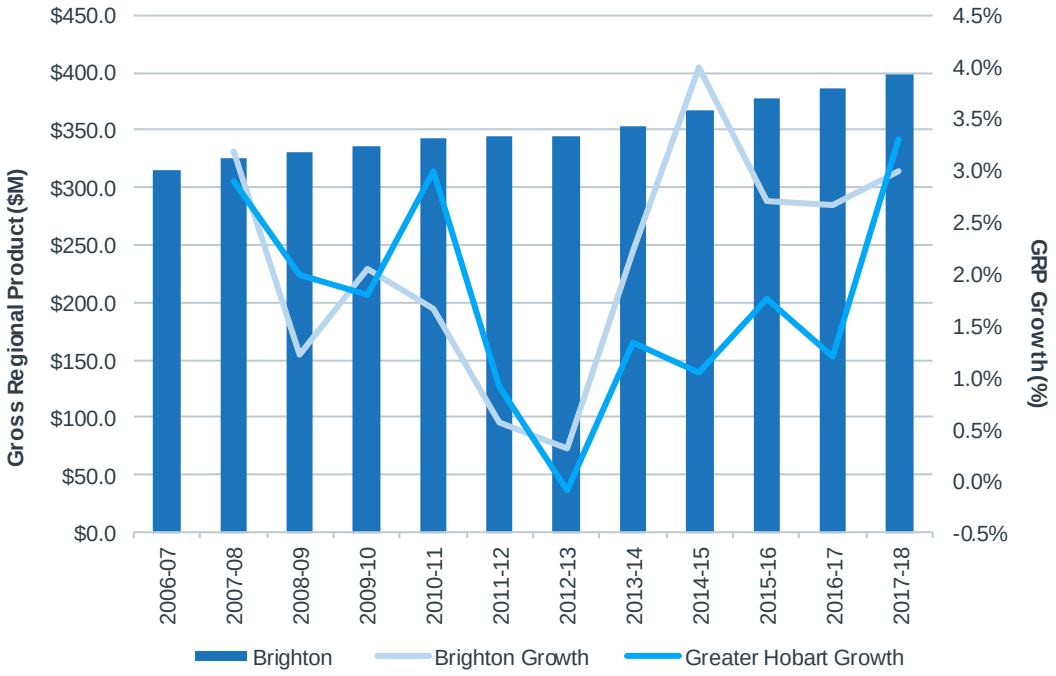
Table A. 1. Place of Usual Residence 5 Years Ago

LGA	Proportion
Brighton	78.5%
Glenorchy	8.1%
Clarence	2.7%
Southern Midlands	1.5%
Hobart	1.4%
Derwent Valley	1.1%
Sorell	0.7%
Overseas	0.6%
Kingborough	0.6%
Central Highlands	0.4%
Elsewhere	4.6%
Total	100.0%

Source: ABS (2017a).

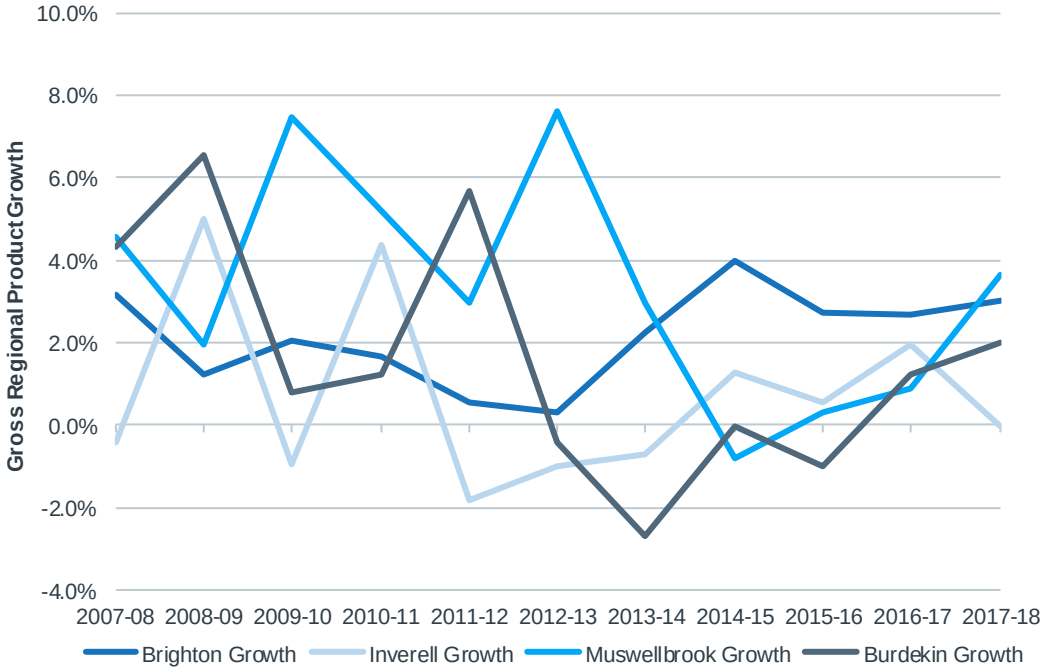
ECONOMY

Figure A. 3. Gross Regional Product and Growth



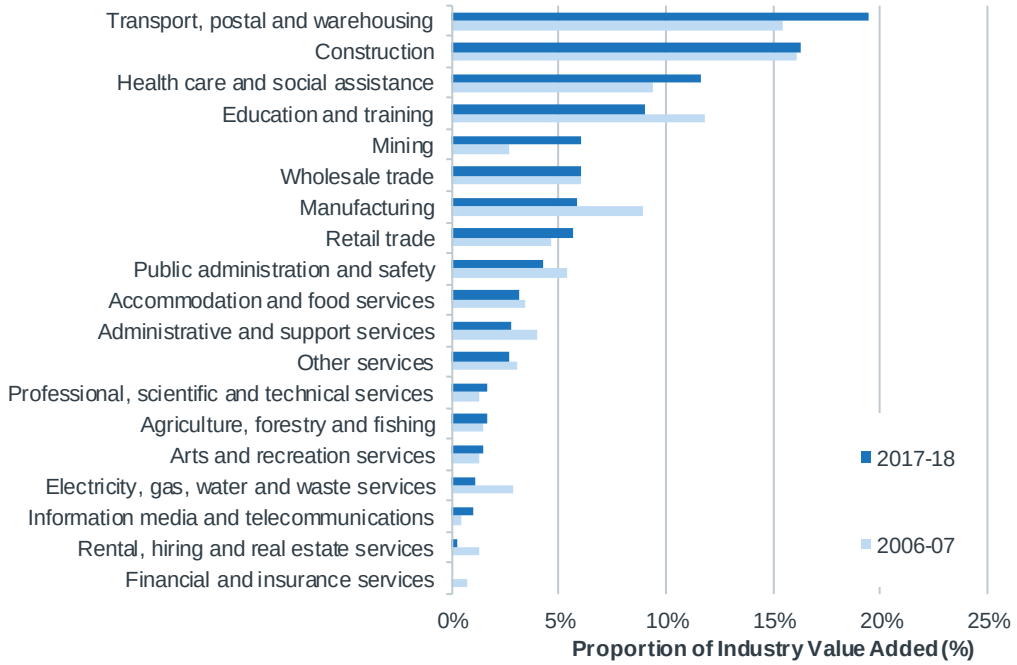
Source: AEC (unpublished).

Figure A. 4. Brighton Comparison Regions GRP Growth



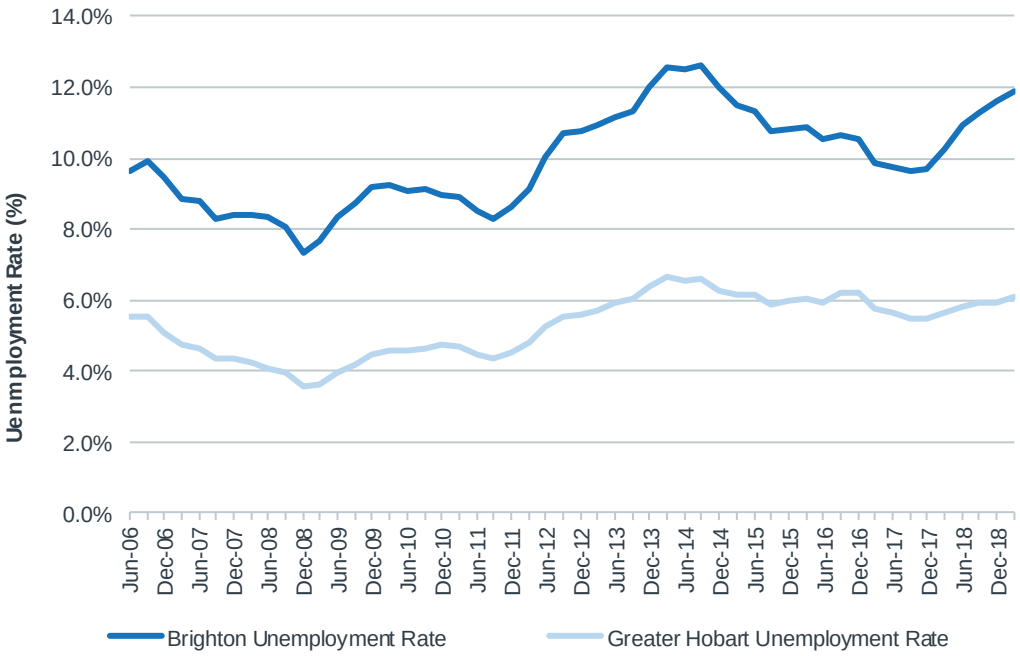
Source: AEC (Unpublished).

Figure A. 5. Brighton Industry Value Added



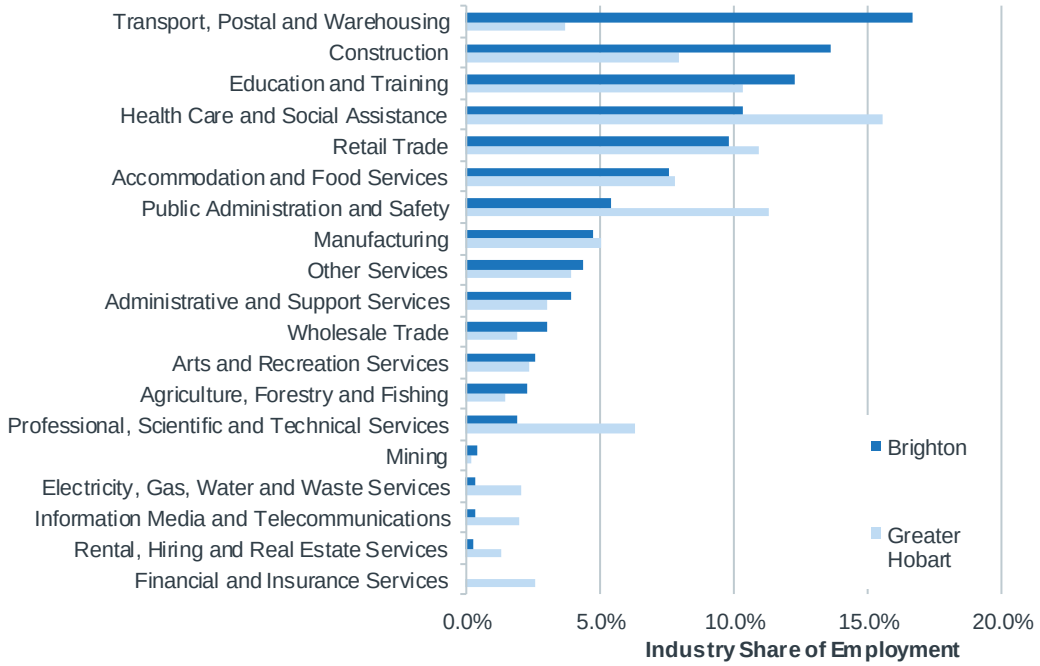
Source: AEC (unpublished).

Figure A. 6. Brighton and Greater Hobart Unemployment



Source: Department of Jobs and Small Business (2019).

Figure A. 7. Proportion of Total Employment (Place of Work), 2016



Source: ABS (2017a).

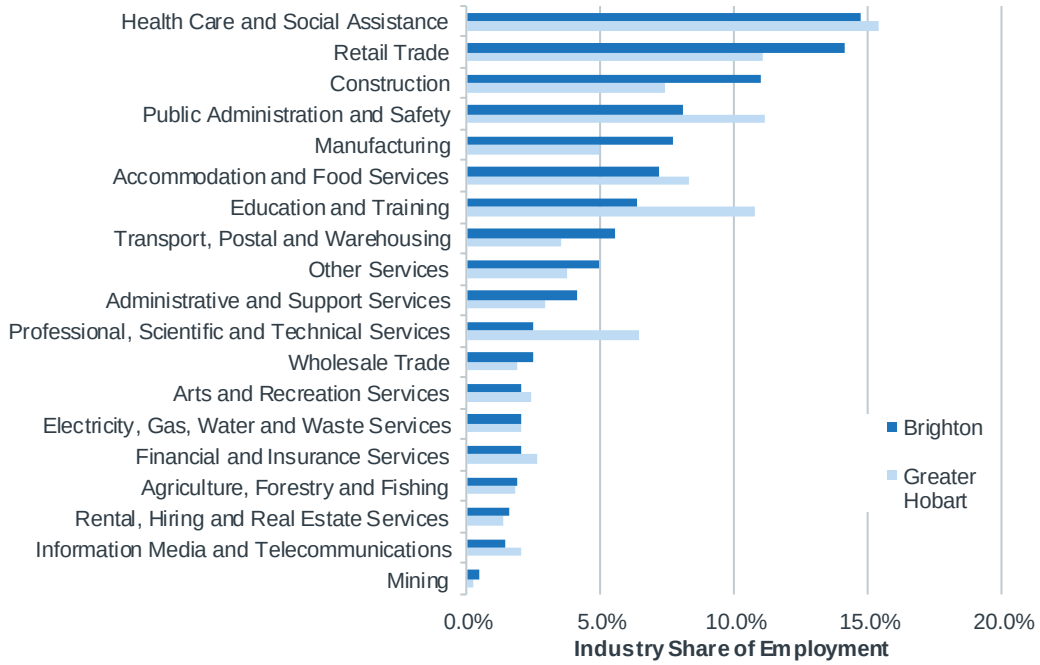
Table A. 2. Employment by Industry (Place of Work)

Industry	Brighton	Greater Hobart	Tasmania	Australia
Agriculture, Forestry and Fishing	68	1,421	12,043	280,038
Mining	13	162	1,898	184,793
Manufacturing	142	5,041	15,081	712,515
Electricity, Gas, Water and Waste Services	11	2,078	3,524	120,158
Construction	408	7,957	17,178	958,148
Wholesale Trade	90	1,869	4,782	321,899

Industry	Brighton	Greater Hobart	Tasmania	Australia
Retail Trade	294	10,939	24,411	1,104,478
Accommodation and Food Services	226	7,816	17,179	773,855
Transport, Postal and Warehousing	500	3,694	9,441	524,432
Information Media and Telecommunications	10	1,971	2,929	186,033
Financial and Insurance Services	0	2,576	4,607	400,579
Rental, Hiring and Real Estate Services	7	1,335	2,767	190,695
Professional, Scientific and Technical Services	57	6,282	10,417	810,336
Administrative and Support Services	118	3,020	6,636	383,197
Public Administration and Safety	161	11,300	17,358	744,626
Education and Training	367	10,324	20,828	970,712
Health Care and Social Assistance	310	15,547	31,860	1,415,682
Arts and Recreation Services	77	2,371	4,124	183,626
Other Services	132	3,942	8,306	418,073
Total	**2,991**	**99,645**	**215,368**	**10,683,874**

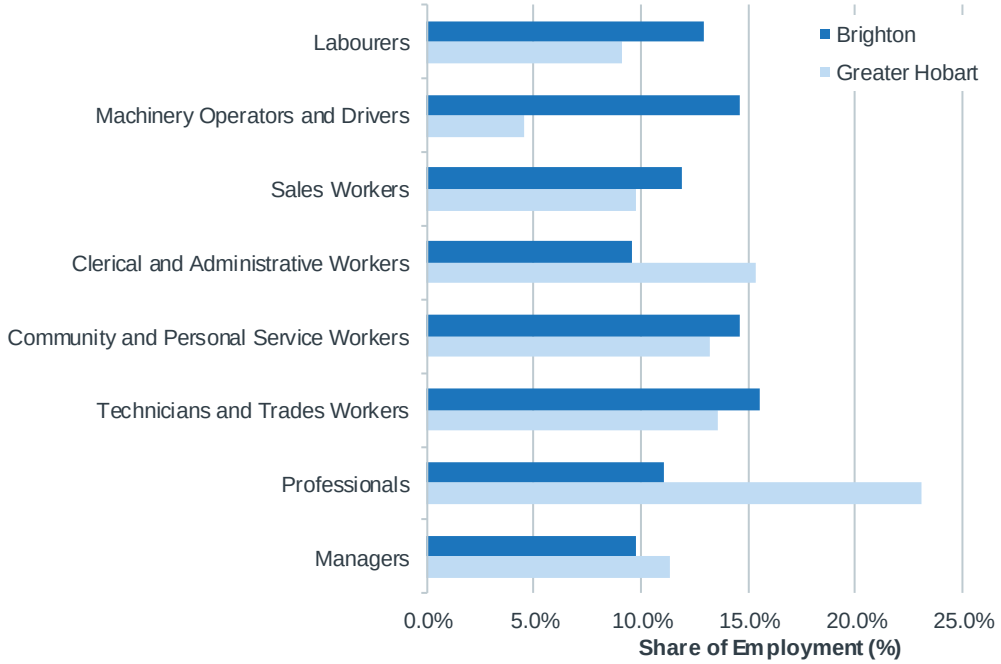
Source: ABS (2017a).

Figure A. 8. Proportion of Total Employment (Place of Usual Residence), 2016



Source: ABS (2017a).

Figure A. 9. Employment by Occupation (Place of Work), 2016



Source: ABS (2017a).

Table A. 3. Journey to Work, Work in Brighton by Place of Usual Residence, 2016

Industry	Brighton	Glenorchy	Clarence	Southern Midlands	Derwent Valley	Other	Total
Agriculture, Forestry and Fishing	53.1%	12.3%	9.9%	9.9%	4.9%	9.9%	**100%**
Mining	72.7%	27.3%	0.0%	0.0%	0.0%	0.0%	**100%**
Manufacturing	37.6%	21.1%	12.0%	12.8%	7.5%	9.0%	**100%**
Electricity, Gas, Water and Waste Services	26.3%	42.1%	0.0%	0.0%	31.6%	0.0%	**100%**
Construction	54.4%	12.5%	7.2%	6.9%	7.2%	11.8%	**100%**
Wholesale Trade	23.3%	26.7%	8.9%	11.1%	5.6%	24.4%	**100%**
Retail Trade	48.3%	18.8%	9.6%	10.6%	9.2%	3.4%	**100%**
Accommodation and Food Services	53.8%	25.6%	3.0%	9.0%	4.5%	4.0%	**100%**
Transport, Postal and Warehousing	30.6%	27.8%	13.4%	8.2%	8.5%	11.5%	**100%**
Information Media and Telecommunications	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**100%**
Financial and Insurance Services	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**100%**
Rental, Hiring and Real Estate Services	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**100%**
Professional, Scientific and Technical Services	72.7%	9.1%	7.3%	10.9%	0.0%	0.0%	**100%**
Administrative and Support Services	55.4%	12.9%	10.9%	0.0%	5.9%	14.9%	**100%**
Public Administration and Safety	21.4%	22.1%	13.6%	7.9%	8.6%	26.4%	**100%**
Education and Training	34.0%	18.2%	16.7%	7.0%	3.8%	20.2%	**100%**
Health Care and Social Assistance	44.9%	21.4%	10.1%	5.8%	10.9%	6.9%	**100%**
Arts and Recreation Services	50.7%	19.4%	9.0%	4.5%	4.5%	11.9%	**100%**
Other Services	48.9%	16.0%	6.1%	9.9%	4.6%	14.5%	**100%**

Source: ABS (2017a).

Table A. 4. Business Counts by Industry, 2018

Industry	Brighton	Greater Hobart	Tasmania	Australia
Agriculture, Forestry and Fishing	8.6%	4.3%	14.7%	7.6%
Mining	0.6%	0.2%	0.3%	0.3%
Manufacturing	4.6%	4.6%	4.5%	3.7%
Electricity, Gas, Water and Waste Services	0.9%	0.4%	0.3%	0.3%
Construction	26.7%	16.2%	15.6%	16.7%
Wholesale Trade	2.6%	2.7%	2.5%	3.5%
Retail Trade	6.2%	6.9%	6.9%	5.7%
Accommodation and Food Services	4.3%	6.2%	5.7%	4.1%
Transport, Postal and Warehousing	10.2%	7.1%	6.1%	7.7%
Information Media and Telecommunications	0.7%	0.8%	0.6%	1.0%
Financial and Insurance Services	3.3%	8.2%	7.1%	9.1%
Rental, Hiring and Real Estate Services	6.2%	10.3%	10.0%	11.0%
Professional, Scientific and Technical Services	5.6%	12.6%	9.4%	12.2%
Administrative and Support Services	4.2%	3.6%	3.0%	4.0%
Public Administration and Safety	0.5%	0.4%	0.4%	0.3%
Education and Training	0.9%	1.2%	0.9%	1.4%
Health Care and Social Assistance	5.5%	8.7%	6.3%	5.9%
Arts and Recreation Services	2.1%	1.5%	1.2%	1.2%
Other Services	6.2%	4.1%	4.4%	4.3%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Total (Number)	**566**	**15,136**	**38,466**	**2,313,291**

Source: ABS (2019b).

Table A. 5. Business Count by Employment

Region	Non employing	1-19 Employees	20-199 Employees	200+ Employees	Total
Brighton	59.5%	37.7%	2.8%	0.0%	100.0%
Greater Hobart	60.9%	36.0%	3.0%	0.1%	100.0%
Tasmania	60.3%	36.8%	2.7%	0.2%	**100.0%**
Australia	62.1%	35.6%	2.2%	0.2%	**100.0%**

Source: ABS (2019b).

Table A. 6. Business Counts by Turnover

Region	Zero to less than $50k	$50k to less than $200k	$200k to less than $2m	$2m to less than $5m	$5m to less than $10m	$10m or more	Total
Brighton	22.1%	38.4%	33.7%	4.1%	1.1%	0.7%	**100.0%**
Greater Hobart	23.4%	34.6%	34.9%	4.5%	1.4%	1.2%	**100.0%**
Tasmania	23.7%	34.4%	35.3%	4.3%	1.3%	1.0%	**100.0%**
Australia	24.8%	34.3%	34.1%	4.0%	1.4%	1.5%	**100.0%**

Source: ABS (2019b).

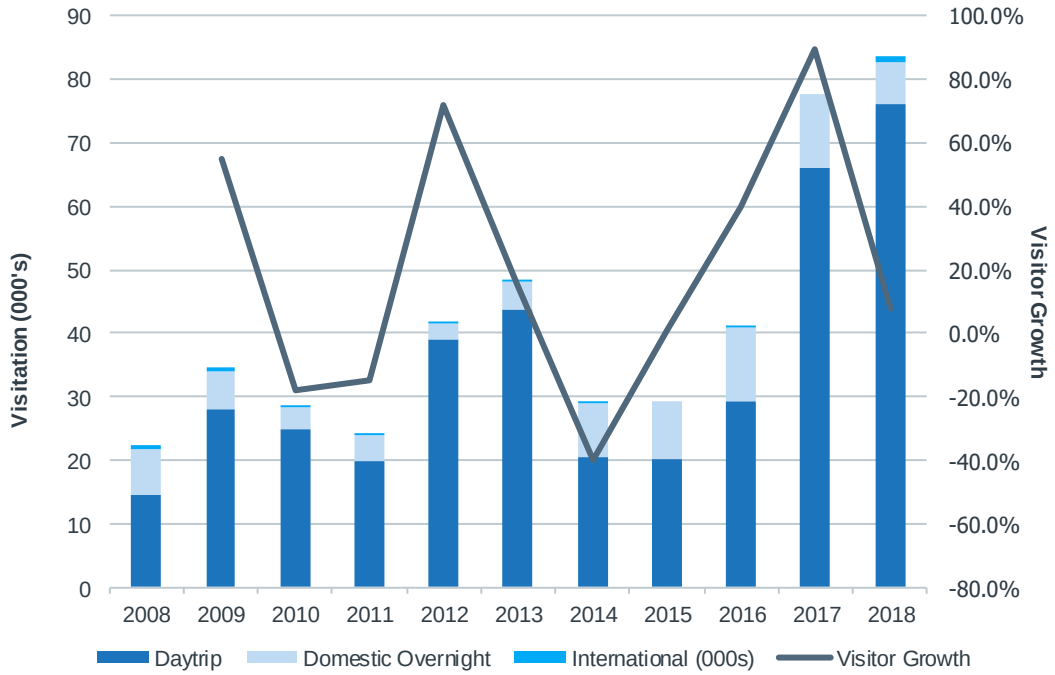
Table A. 7. Business Counts by Year

Region	2016	2017	2018
Brighton	555	538	566
Greater Hobart	14,229	14,639	15,136
Tasmania	37,070	37,743	38,466
Australia	2,171,544	2,238,299	2,313,291

Source: ABS (2019b).

TOURISM

Figure A. 10. Visitation by Type and Growth



Source: TRA (2019a), TRA (2019b).

HOUSING

Table A. 8. Household Type

Household Type	Brighton	Greater Hobart	Tasmania	Australia
Family Household	71.2%	63.4%	63.2%	66.7%
Lone person household	20.9%	27.6%	27.9%	22.8%
Group household	2.3%	3.9%	3.1%	4.0%
Visitors only	0.6%	1.2%	1.4%	1.7%
Other non-classifiable	4.9%	3.9%	4.3%	4.8%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2017a).

Table A. 9. Dwelling Type

Dwelling Type	Brighton	Greater Hobart	Tasmania	Australia
Separate house	88.6%	82.4%	86.9%	71.5%
Semi-detached, row or terrace house, townhouse etc.	2.0%	6.7%	6.0%	12.9%
Flat or apartment	9.2%	10.2%	6.1%	14.2%
Caravan	0.1%	0.1%	0.3%	0.7%
Cabin, houseboat	0.0%	0.2%	0.3%	0.3%
Improvised home, tent, sleepers out	0.1%	0.1%	0.2%	0.2%
House or flat attached to a shop, office, etc.	0.1%	0.2%	0.3%	0.3%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2017a).

Table A. 10. Mortgage and Rental Stress

LGA	Mortgage Stress	Rental Stress
Brighton	7.7%	35.0%
Greater Hobart	5.8%	30.4%

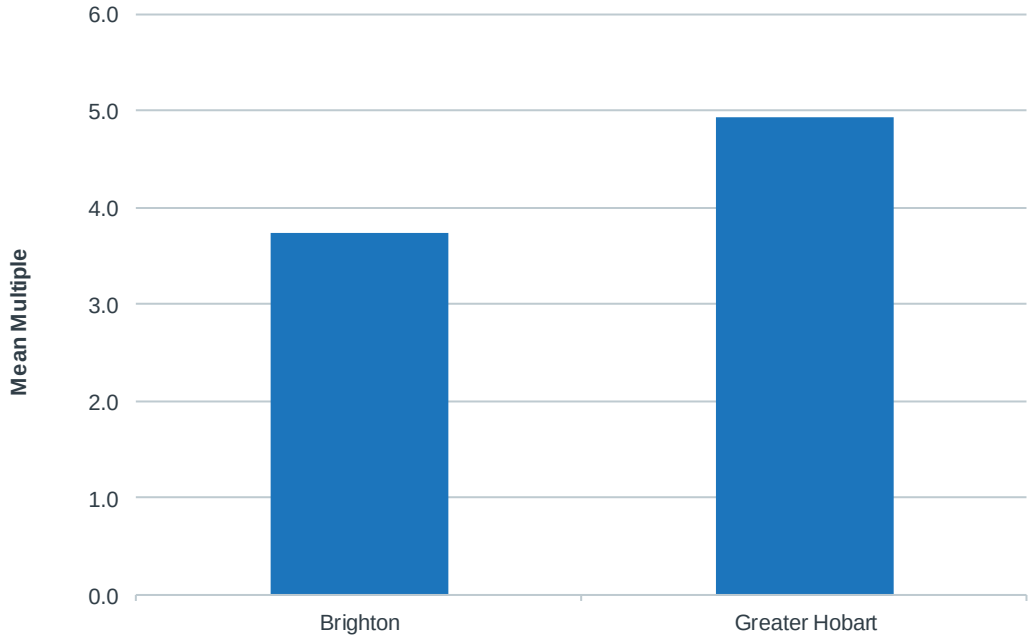
Source: ABS (2017a).

Table A. 11. Household Income, 2016

LGA	Household Income
Brighton	$1,341
Greater Hobart	$1,576
Tasmania	Australia
86.9%	71.5%

Source: ABS (2017a).

Figure A. 11. Mean Multiple, 2016



Source: Corelogic (2019), ABS (2017a).

EDUCATION

Table A. 12. High School Completion

LGA	Completed High School	Did not complete high school	Total
Brighton	31.8%	68.2%	100.0%
Greater Hobart	52.2%	47.8%	100.0%
Tasmania	42.1%	57.9%	100.0%
Australia	56.8%	43.2%	100.0%

Source: ABS (2017a).

Table A. 13. Non-School Qualification

Qualification	Brighton	Greater Hobart	Tasmania	Australia
Postgraduate Degree Level	0.7%	5.0%	3.3%	4.8%
Graduate Diploma and Graduate Certificate Level	0.7%	2.5%	1.8%	2.0%
Bachelor Degree Level	4.4%	14.7%	11.4%	14.9%
Advanced Diploma and Diploma Level	5.6%	7.9%	7.6%	8.7%
Certificate Level	24.7%	18.8%	21.8%	18.5%
No Qualification	63.9%	51.2%	54.1%	51.1%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2017a).

PROJECTIONS

Table B. 1. Employment Projections and Growth Rates

Indicator	2016	2021	2026	2031	2036	2041	2046	2051
Total Employment	2,991	3,287	3,425	3,539	3,627	3,696	3,751	3,800
Avg. Annual Employment Growth	-	1.9%	0.8%	0.7%	0.5%	0.4%	0.3%	0.3%
Avg. Annual Population Growth (%)	1.2%	1.6%	1.3%	1.2%	1.0%	0.9%	0.8%	0.7%

Source: ABS (2017a), DOTF (2019), AEC

Table B. 2. Estimated Employment by Industry, 2016 and 2051

Industry	2016	2051
Transport, postal and warehousing	16.7%	19.7%
Construction	13.7%	17.0%
Education and training	12.3%	10.4%
Health care and social assistance	10.4%	10.4%
Retail trade	9.8%	9.9%
Accommodation and food services	7.6%	6.8%
Public administration and safety	5.4%	5.4%
Manufacturing	4.7%	3.0%
Other services	4.4%	3.4%
Administrative and support services	3.9%	4.2%
Wholesale trade	3.0%	1.9%
Arts and recreation services	2.6%	3.6%
Agriculture, forestry and fishing	2.3%	1.1%
Professional, scientific and technical services	1.9%	1.9%
Mining	0.4%	0.4%
Electricity, gas, water and waste services	0.4%	0.3%
Information media and telecommunications	0.3%	0.3%
Rental, hiring and real estate services	0.2%	0.2%
Financial and insurance services	0.0%	0.0%

Source: ABS (2017a), AEC

Table B. 3. Estimated Contribution to Growth, 2016 to 2051

Industry	Estimated Contribution to Growth
Transport, postal and warehousing	8.3%
Construction	7.9%
Health care and social assistance	2.8%
Retail trade	2.7%
Arts and recreation services	2.0%
Public administration and safety	1.5%
Administrative and support services	1.5%
Accommodation and food services	1.1%
Education and training	0.9%
Professional, scientific and technical services	0.5%
Information media and telecommunications	0.1%
Rental, hiring and real estate services	0.1%
Mining	0.0%
Electricity, gas, water and waste services	0.0%
Financial and insurance services	0.0%
Other services	0.0%
Wholesale trade	-0.6%

Industry	Estimated Contribution to Growth
Agriculture, forestry and fishing	-0.9%
Manufacturing	-1.0%

Source: ABS (2017a), AEC

Table B. 4. Estimated Gross Regional Product, 2016 to 2051

Indicator	2016	2021	2026	2031	2036	2041
Gross Regional Product	$377.1	$420.6	$459.4	$496.5	$531.1	$563.8
Avg. Annual GRP Growth	-	2.2%	1.8%	1.6%	1.4%	1.2%

Source: ABS (2017a), DOTF (2019), AEC

APPENDIX B: PRECINCT DATA DETAILS

POPULATION

Table B. 5. Population by Age, 2016

2016	0-24 years	25-64 years	65+ years	Total
Bridgewater Retail and Services Hub	38.6%	48.6%	12.9%	100.0%
Bridgewater Industrial Estate	39.8%	45.8%	14.4%	100.0%
Brighton Town Centre	38.0%	49.0%	13.0%	100.0%

Source: ABS (2017a).

Table B. 6. Population by Age, 2011

2011	0-24 years	25-64 years	65+ years	Total
Bridgewater Retail and Services Hub	38.9%	53.2%	7.9%	**100.0%**
Bridgewater Industrial Estate	34.6%	52.2%	13.2%	**100.0%**
Brighton Town Centre	37.8%	51.4%	10.8%	**100.0%**

Source: ABS (2012).

Table B. 7. Average Age of Precincts

Precinct	2011	2016
Bridgewater Retail and Services Hub	33.7	35.4
Bridgewater Industrial Estate	36.7	36.2
Brighton Town Centre	33.7	34.3

Source: ABS (2012), ABS (2017a).

Table B. 8. LGA of Usual Residence 5 Years Ago

Rank	Bridgewater Retail and Services Hub	Bridgewater Industrial Estate	Brighton Town Centre
1	Brighton 84.8%	Brighton 78.8%	Brighton 77.8%
2	Glenorchy 3.6%	Glenorchy 8.1%	Glenorchy 9.9%
3	Southern Midlands 1.7%	Clarence 3.1%	Southern Midlands 2.9%
4	Derwent Valley 1.7%	Central Highlands 2.8%	Derwent Valley 2%
5	Salisbury 1.5%	Southern Midlands 2.2%	Clarence 1.8%

Source: ABS (2017a).

HOUSING

Table B. 9. Household Composition, 2016

Precinct	Family household	Lone person household	Group household	Visitors only	Other non-classifiable	Total
Bridgewater Retail and Services Hub	63.5%	29.2%	2.2%	0.0%	5.1%	100.0%
Bridgewater Industrial Estate	70.1%	20.4%	3.4%	0.0%	6.1%	100.0%
Brighton Town Centre	70.1%	22.3%	2.4%	0.3%	4.9%	100.0%

Source: ABS (2017a).

Table B. 10. Household Composition, 2011

Precinct	Family household	Lone person household	Group household	Visitors only	Other non-classifiable	Total
Bridgewater Retail and Services Hub	64.3%	21.0%	1.2%	1.2%	12.3%	100.0%
Bridgewater Industrial Estate	77.9%	19.9%	0.0%	0.0%	2.2%	100.0%

Precinct	Family household	Lone person household	Group household	Visitors only	Other non-classifiable	Total
Brighton Town Centre	73.8%	20.6%	3.2%	0.9%	1.5%	100.0%

Source: ABS (2017a).

Table B. 11. Precinct Dwelling Structure, 2016

Precinct	Separate house	Semi-detached, row or terrace house, townhouse etc.	Flat or apartment	Caravan, Cabin, houseboat	Improvised home, tent, sleepers out	House or flat attached to a shop, office, etc.	Total
Bridgewater Retail and Services Hub	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**100.0%**
Bridgewater Industrial Estate	87.2%	8.1%	0.0%	0.0%	4.7%	0.0%	**100.0%**
Brighton Town Centre	74.9%	1.5%	23.6%	0.0%	0.0%	0.0%	**100.0%**

Source: ABS (2017a).

Table B. 12. Precinct Dwelling Structure, 2011

Precincts	Separate house	Semi-detached, row or terrace house, townhouse etc.	Flat or apartment	Caravan, Cabin, houseboat	Improvised home, tent, sleepers out	House or flat attached to a shop, office, etc.	Total
Bridgewater Retail and Services Hub	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**100.0%**
Bridgewater Industrial Estate	87.2%	8.1%	0.0%	0.0%	4.7%	0.0%	**100.0%**
Brighton Town Centre	74.9%	1.5%	23.6%	0.0%	0.0%	0.0%	**100.0%**

Source: ABS (2012).

EDUCATIONAL ATTAINMENT

Table B. 13. High School Completion, 2016

Precinct	Completed Year 12	Did not Complete High School	Total
Bridgewater Retail and Services Hub	25.8%	9.2%	**100.0%**
Bridgewater Industrial Estate	31.9%	9.8%	**100.0%**
Brighton Town Centre	27.7%	12.7%	**100.0%**

Source: ABS (2017a).

Table B. 14. High School Completion, 2011

Precinct	Completed Year 12	Did not Complete High School	Total
Bridgewater Retail and Services Hub	24.5%	75.5%	**100.0%**
Bridgewater Industrial Estate	24.0%	76.0%	**100.0%**
Brighton Town Centre	26.8%	73.2%	**100.0%**

Source: ABS (2012).

Table B. 15. Post School Qualification, 2016

Precinct	Postgraduate Degree Level	Graduate Diploma and Graduate Certificate Level	Bachelor Degree Level	Advanced Diploma and Diploma Level	Certificate Level	No Qualification	Total
Bridgewater Retail and Services Hub	0.0%	0.0%	2.0%	4.2%	19.0%	74.8%	**100%**
Bridgewater Industrial Estate	0.0%	0.0%	4.4%	5.1%	22.9%	67.7%	**100%**
Brighton Town Centre	0.1%	0.4%	2.6%	3.3%	23.6%	69.9%	**100%**

Source: ABS (2017a).

Table B. 16. Post School Qualification, 2011

Precinct	Postgraduate Degree Level	Graduate Diploma and Graduate Certificate Level	Bachelor Degree Level	Advanced Diploma and Diploma Level	Certificate Level	No Qualification	Total
Bridgewater Retail and Services Hub	0.0%	0.0%	2.4%	5.9%	25.9%	65.8%	**100%**
Bridgewater Industrial Estate	0.0%	0.0%	4.6%	5.3%	24.0%	66.1%	**100%**
Brighton Town Centre	0.1%	0.4%	2.9%	3.7%	25.6%	67.2%	**100%**

Source: ABS (2012).

EMPLOYMENT

Table B. 17. Brighton Precincts, Employment by Industry, 2016

Industry	Bridgewater Retail and Services Hub	Bridgewater Industrial Estate	Brighton Town Centre
Agriculture, Forestry and Fishing	0.0%	1.2%	4.0%
Mining	0.0%	2.4%	0.0%
Manufacturing	2.5%	10.1%	6.4%
Electricity, Gas, Water and Waste Services	0.3%	1.0%	0.7%
Construction	4.6%	14.6%	20.2%
Wholesale Trade	1.3%	10.4%	0.9%
Retail Trade	22.9%	0.6%	6.1%
Accommodation and Food Services	12.2%	4.9%	5.5%
Transport, Postal and Warehousing	10.7%	44.5%	14.3%
Information Media and Telecommunications	0.4%	0.0%	0.4%
Financial and Insurance Services	0.0%	0.0%	0.0%

Industry	Bridgewater Retail and Services Hub	Bridgewater Industrial Estate	Brighton Town Centre
Rental, Hiring and Real Estate Services	0.0%	0.0%	0.0%
Professional, Scientific and Technical Services	0.0%	1.6%	2.5%
Administrative and Support Services	4.8%	0.0%	4.6%
Public Administration and Safety	8.7%	2.0%	3.0%
Education and Training	19.1%	3.0%	10.6%
Health Care and Social Assistance	7.1%	0.0%	8.4%
Arts and Recreation Services	2.0%	0.0%	5.2%
Other Services	3.4%	3.7%	7.1%
Total	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2017a).

Table B. 18. Brighton Precincts Employment by Industry, 2011

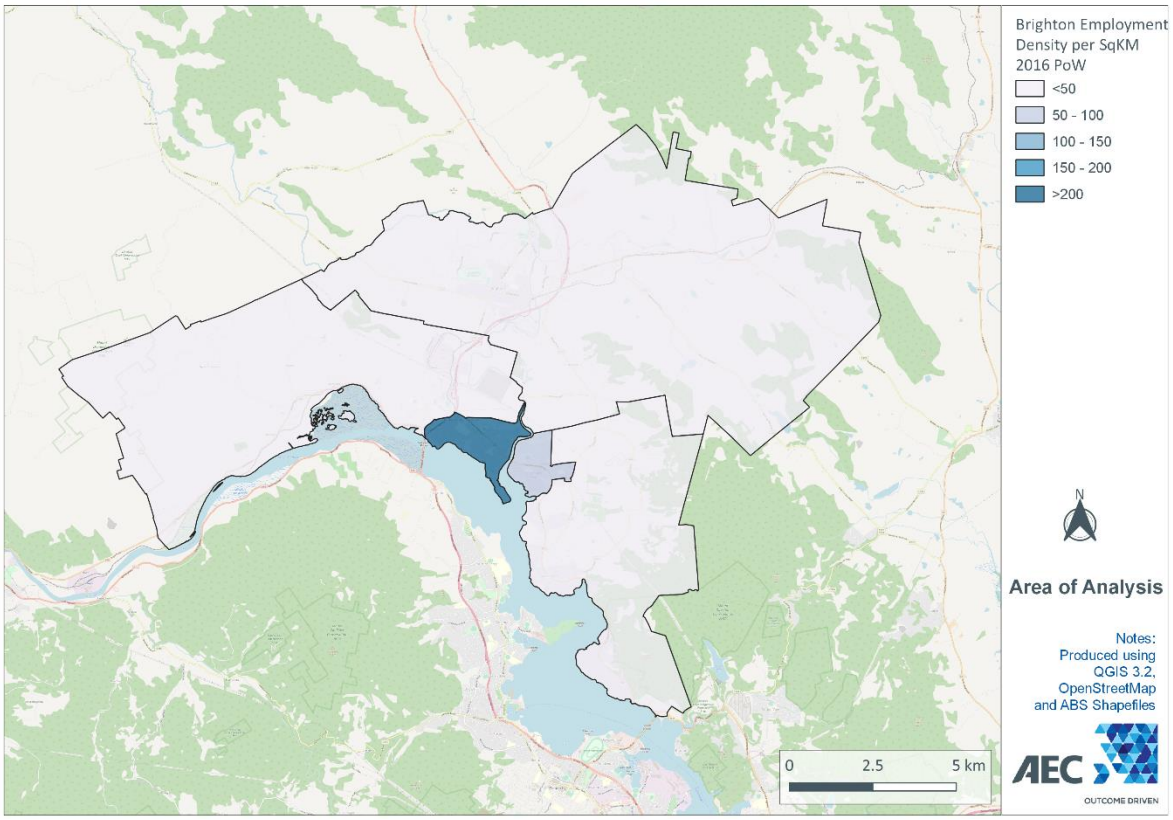
Industry	Bridgewater Retail and Services Hub	Bridgewater Industrial Estate	Brighton Town Centre
Agriculture, Forestry and Fishing	0.0%	1.9%	5.4%
Mining	0.0%	2.6%	0.0%
Manufacturing	2.4%	16.9%	7.3%
Electricity, Gas, Water and Waste Services	0.6%	1.4%	1.3%
Construction	5.4%	14.5%	20.4%
Wholesale Trade	2.1%	13.9%	4.4%
Retail Trade	22.3%	3.4%	6.0%
Accommodation and Food Services	12.9%	4.0%	4.8%
Transport, Postal and Warehousing	9.0%	24.4%	13.7%
Information Media and Telecommunications	0.0%	0.0%	0.6%
Financial and Insurance Services	0.0%	0.0%	0.0%
Rental, Hiring and Real Estate Services	0.0%	1.6%	3.1%
Professional, Scientific and Technical Services	0.9%	0.0%	1.9%
Administrative and Support Services	4.4%	3.0%	1.9%
Public Administration and Safety	8.1%	2.3%	4.1%
Education and Training	20.4%	1.6%	11.8%
Health Care and Social Assistance	8.9%	1.0%	5.6%

Industry	Bridgewater Retail and Services Hub	Bridgewater Industrial Estate	Brighton Town Centre
Arts and Recreation Services	0.8%	0.4%	2.3%
Other Services	1.9%	7.0%	5.6%
Total	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2012).

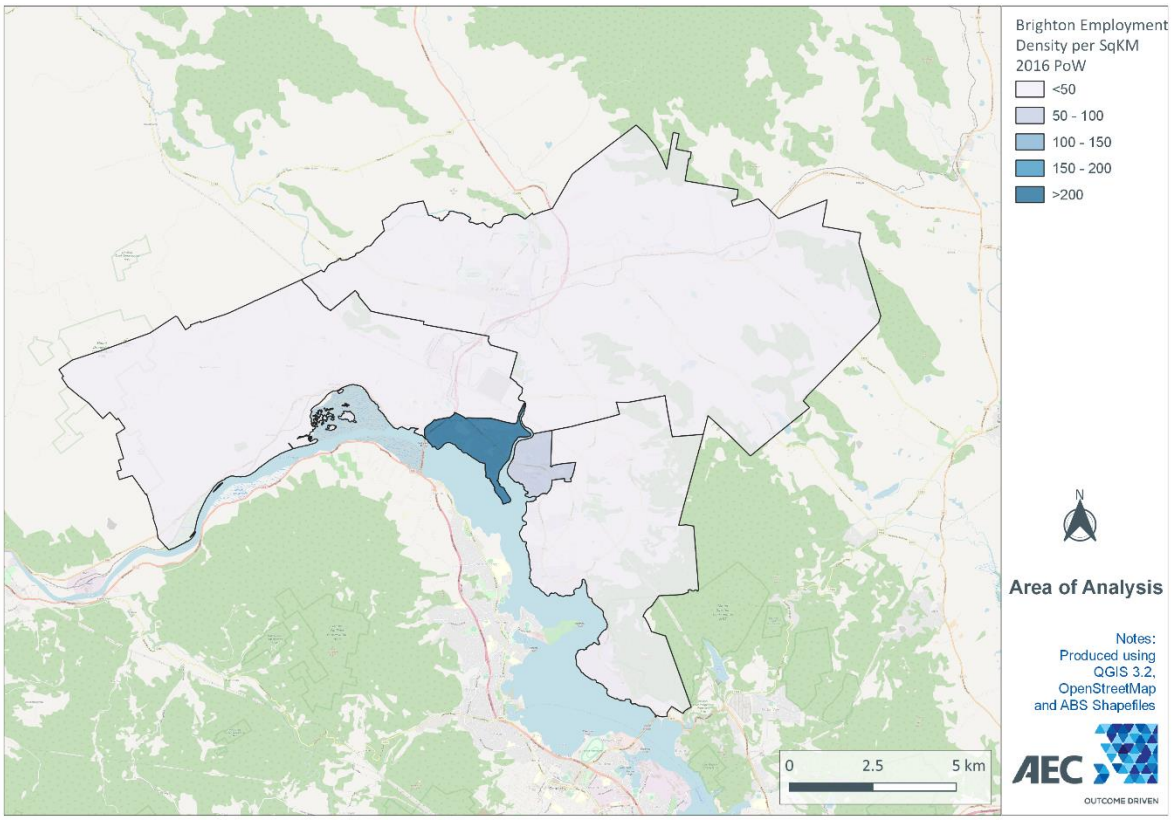
APPENDIX C: MAPS

Figure C. 1. Employment Density, 2016



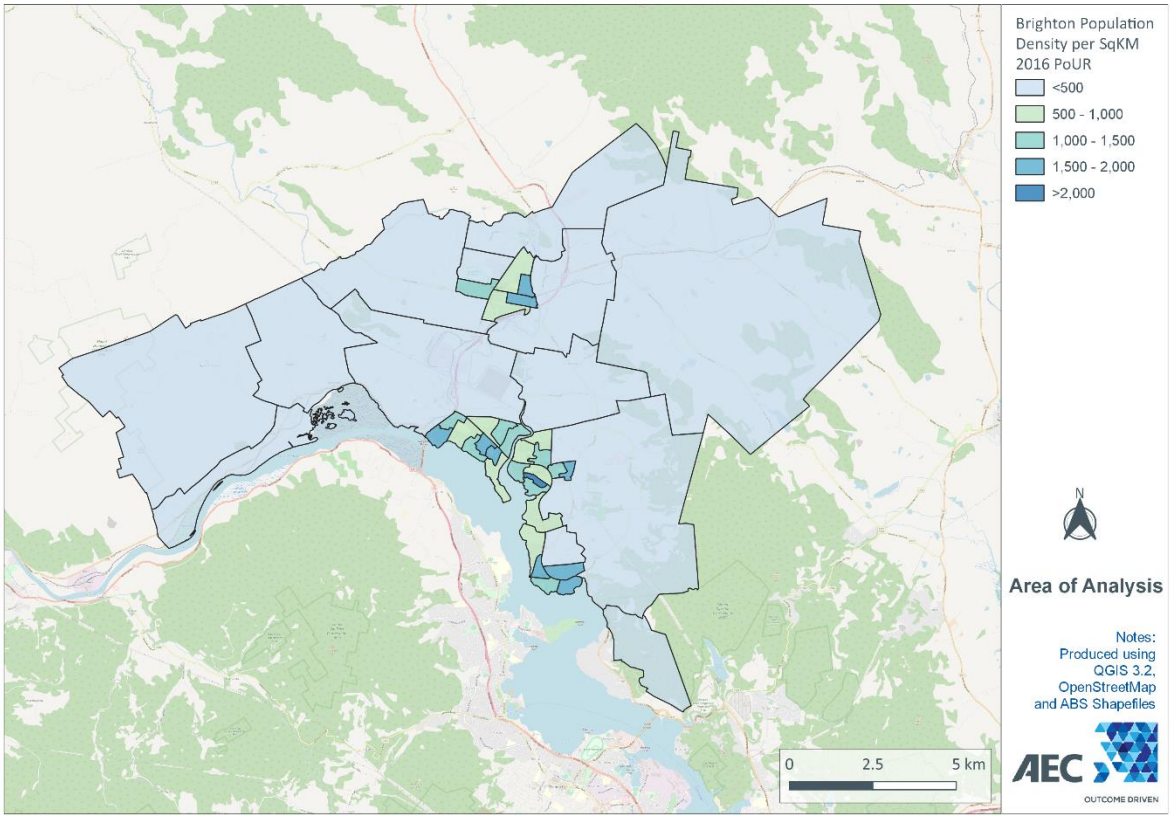
Source: AEC, ABS (2017a).

Figure C. 2. Employment Density, 2011



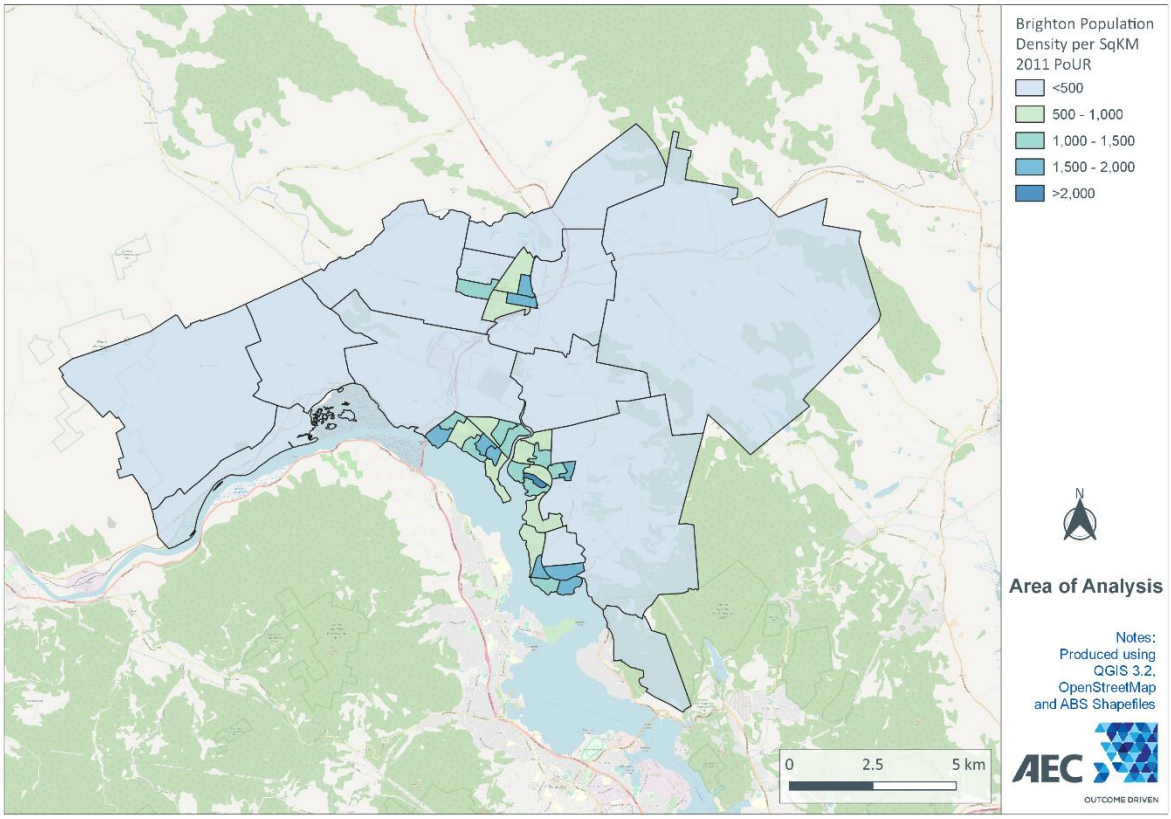
Source: AEC, ABS (2012).

Figure C. 3. Population Density, 2016



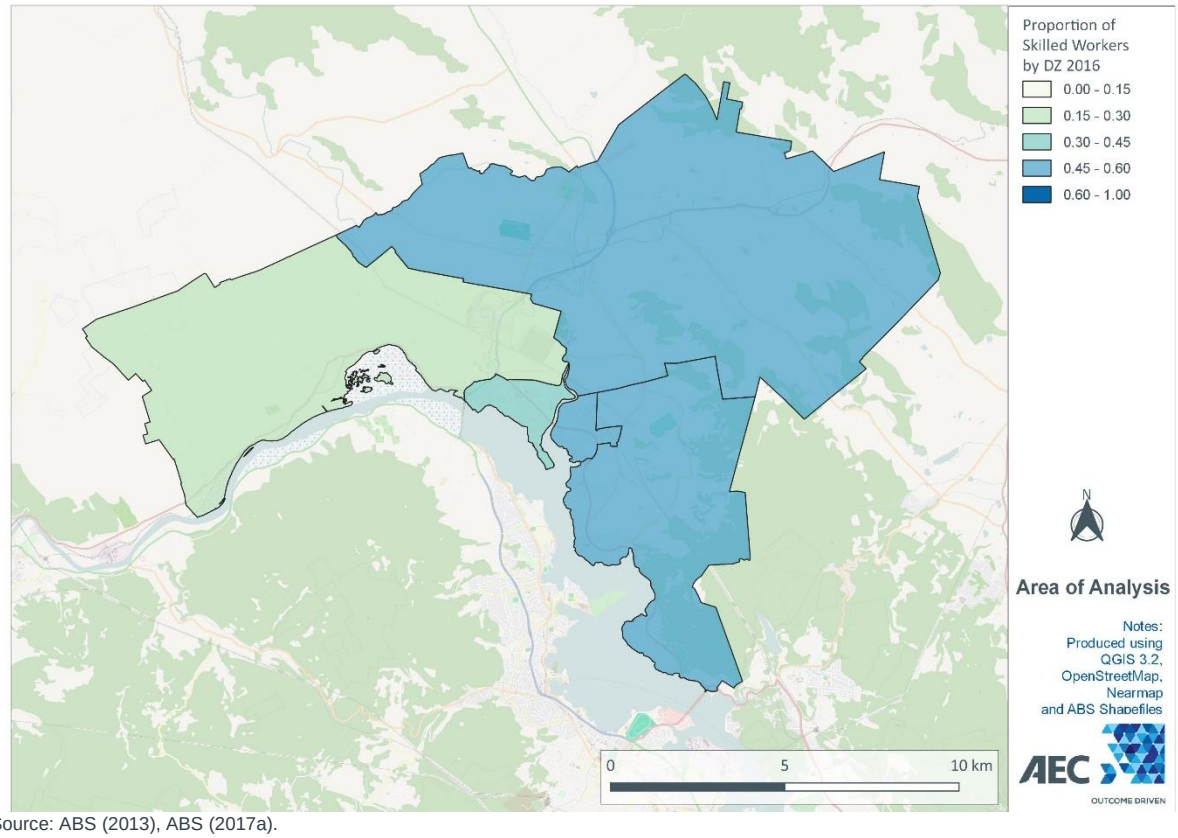
Source: AEC, ABS (2017a).

Figure C. 4. Population Density, 2011



Source: AEC, ABS (2012).

Figure C. 5. Skilled Workers, 2016



Source: ABS (2013), ABS (2017a).

Table C. 1. Brighton Employment Density, 2011 and 2016

DZ	2011	2016
610011011	10.2	11.5
610011012	256.0	281.6
610011013	77.7	60.0
610021015	10.1	10.2
610031096	8.6	11.4

Source: AEC, ABS. (2012), ABS (2017a).

Table C. 2. Brighton Population Density, 2011 and 2016

SA1	2011	2016
6100101	911	880
6100102	1,510	1,440
6100103	1,881	1,465
6100104	665	591
6100105	783	805
6100106	57	53
6100107	26	27
6100108	720	717
6100109	1,283	1,134
6100110	1,157	1,088
6100111	2,108	1,860
6100112	1,236	1,296
6100113	1,098	1,138
6100114	1,966	1,746
6100115	1,396	1,276
6100116	581	557
6100117	1,582	1,646
6100118	909	928
6100119	1,273	1,447
6100120	1,663	1,710
6100121	2,338	2,478
6100122	28	28
6100123	7	7
6100201	569	642
6100202	1,575	1,936
6100203	7	6
6100204	62	69
6100205	27	26
6100206	62	69
6100208	58	62
6100209	788	827
6100210	1,462	1,599
6100211	271	425
6100212	677	1,380
6100301	0	0
6100302	1,570	1,608
6100303	20	28
6100304	151	204
6100305	1,458	1,604
6100306	994	633

SA1	2011	2016
6100308	896	993
6100310	1,640	1,735
6100311	1,621	1,443

Source: AEC, ABS. (2012), ABS (2017a).

APPENDIX D: EMPLOYMENT PROJECTIONS METHODOLOGY

The approach used in developing employment projections is described in detail below.

DATA INPUTS

- Research regarding existing, emerging and expected future change factors (e.g. micro- and macro- factors, competitive advantages of the region (relative to other regions in Tasmania), multi-factor productivity and population growth and projections).
- AEC's proprietary Employment Projections Model (EPM) for Tasmania was used to generate state-level projections of employment to 2051 by 1-digit ANZSIC (Division level). This provided a baseline for employment and economic growth in the state, as well as baseline expectations for productivity changes.

The EPM applies statistical regression techniques to project future employment, using historical relationships between employment, gross value added production and productivity, combined with published future projections for Australian and Tasmanian economic growth (i.e. Gross Domestic Product and Gross State Product).

Employment growth projections are also tied to projections of population (and labour force participation) to ensure projections of employment remain within an acceptable bound.

The EPM intrinsically incorporates historic trends in the regression analysis, however, the model is sufficiently flexible to include, and was adjusted to incorporate, the findings and understanding from research surrounding the emerging and expected macro trends into the modelling by adjusting future productivity curves according to expectations for change.

- Historic/ current employment for the Tasmanian sub-regions (statistical divisions) of Northern, Greater Hobart (which extends beyond the Greater Hobart definition applied in this study), Mersey-Lyell, Southern and Unincorporated Tasmania.

REGIONAL EMPLOYMENT BY INDUSTRY PROJECTIONS

Overview

A regionalisation process was applied to develop projections of employment across 19 industries for all sub-regions in Tasmania, based on historical trends (2006 to 2016) in sub-regional employment growth compared to trends in employment growth at the state (Tasmania) level, consideration was also made for the existing structure of employment within the sub-regions as a proportion of state-level employment in 2016.

This process was undertaken for the sub-regions in Tasmania These projections were then disaggregated to the LGAs within the sub-regions and LGAs in a separate process. See the following sub-section titled 'Tasmania Sub-Region & Local Government 1 Digit ANZSIC Industry Estimates' for details of this process.

Tasmania 1-Digit ANZSIC Industry Growth Rates

Industry growth rates for employment at the 1-digit ANZSIC level were developed using AEC's Tasmania EPM. A summary of historic (ABS, 2012, 2017) and projected (from the Tasmania EPM) employment for Tasmania are presented in Table D. 1.

Table D. 1. Tasmania Historic and Projected Growth (Employment), Average Annual, 1-Digit ANZSIC

Industry	Employment		
	2000 to 2018	2017 to 2031	2031 to 2051
Agriculture, forestry and fishing	-1.6%	-0.6%	-0.5%
Mining	3.5%	0.3%	0.0%
Manufacturing	-1.6%	-1.3%	-0.9%
Electricity, gas, water and waste services	4.5%	0.3%	0.0%
Construction	4.5%	1.3%	0.7%
Wholesale trade	-2.0%	-0.6%	-0.7%
Retail trade	1.4%	0.7%	0.3%
Accommodation and food services	1.5%	1.0%	0.5%
Transport, postal and warehousing	0.5%	0.4%	0.1%
Information media and telecommunications	-1.3%	0.5%	0.2%
Financial and insurance services	0.4%	-0.3%	-0.4%
Rental, hiring and real estate services	2.8%	1.2%	0.6%
Professional, scientific and technical services	2.4%	1.4%	0.6%
Administrative and support services	0.6%	1.0%	0.6%
Public administration and safety	1.3%	0.7%	0.6%
Education and training	1.2%	0.3%	0.0%
Health care and social assistance	2.7%	1.5%	0.8%
Arts and recreation services	5.4%	1.3%	0.8%
Other services	1.4%	-0.5%	-0.5%

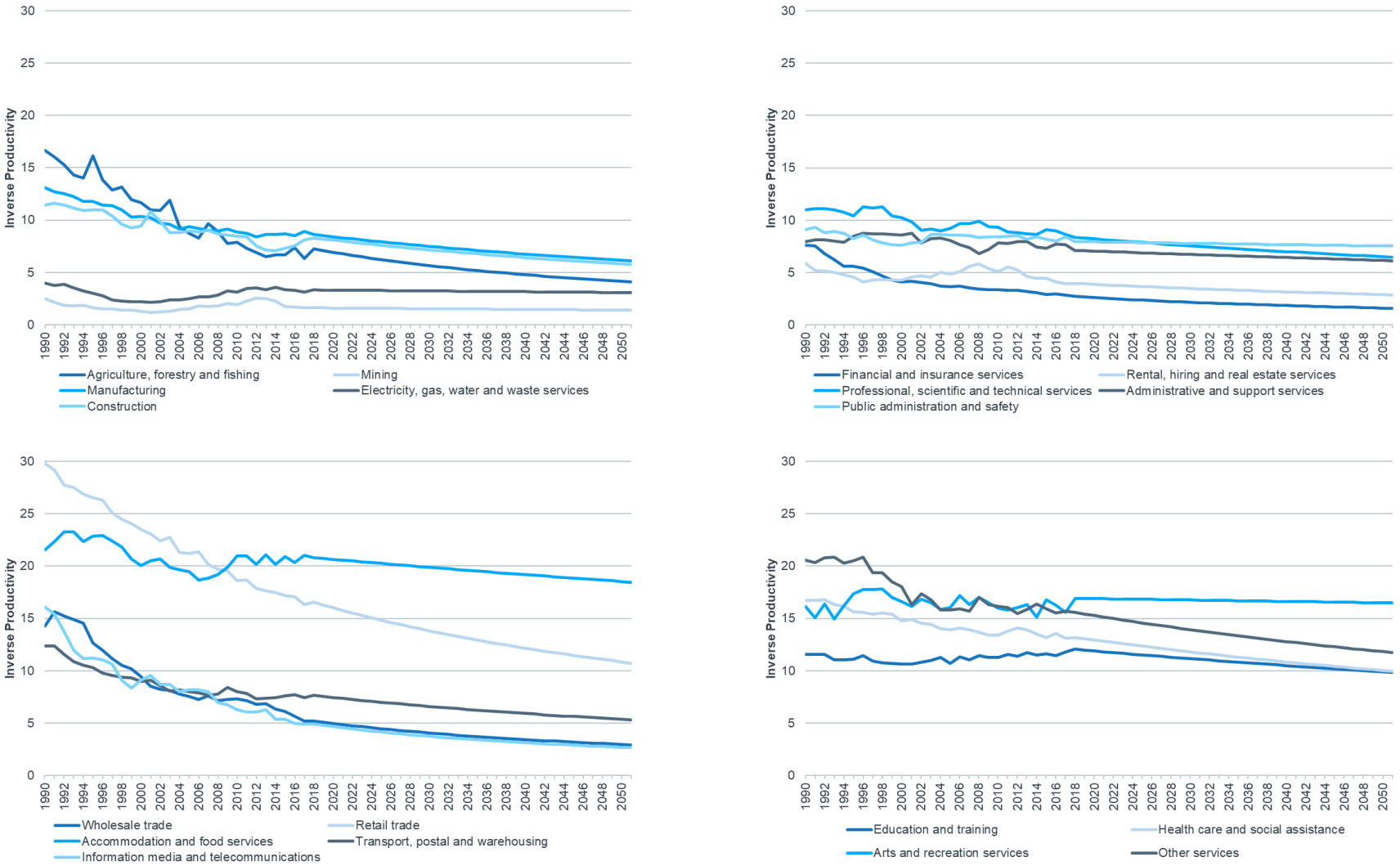
Source: ABS (2017i), ABS (2017j), AEC.

In developing the employment projections, projections of productivity per employee (value added activity per employee) were developed using linear regressions based primarily on historic productivity increases between 1990 and 2018. Depictions of projected productivity increases for each 1-digit ANZSIC industry are provided in Figure D. 1. Note the inverse productivity is shown, i.e., the number of employees required to produce $1M in value added activity for each industry (where a decline in inverse productivity translates to an improvement or increase in production per employee).

In developing these productivity curves, research regarding micro- and macro- factors was also considered and implications applied as appropriate, in addition to the historic trends observed in the data. Adjustments were made where considered appropriate, to the following industries:

- Mining: Regression from 1990 to 2018 estimated declining productivity. Productivity calculation for projection period amended to reflect historic change between 1990 and 2010.
- Electricity, gas, water and waste services: Changes in policy over the past decade towards greater levels of renewable energies has seen productivity in this industry decline. However, longer term this recent trend is anticipated to revert. Projections therefore used the period between 1990 and 2013.
- Information Media and Telecommunications: This industry has experienced significant increases in productivity over the historical period. However, long-term this trend is likely to flatten. Projections therefore used the period between 1990 and 1999.
- Health Care and Social Assistance: This industry has experienced significant increases in productivity over the historical period. However, long-term this trend is likely to flatten. Projections therefore used the period between 1990 and 2004.

Figure D. 1. Inverse Productivity Curves, Tasmania, Historic and Projected (Employees per $1M in Value Added Production)



Source: AEC.

Productivity is a key component in the modelling for projecting future employment. Modelling in the first instance projects future economic growth in terms of gross value added activity (i.e., industry contribution to Gross Regional Product). Future gross value added activity is then converted to an employment estimate based on the projections of productivity outlined in Figure D. 1.

Industries that are projected to record high productivity growth (represented by a curve declining more rapidly towards an inverse productivity of 0 in Figure D. 1, e.g. retail trade) reflect industries that are expected to see the largest decrease in the number of employees required to produce every $1 million of the goods and services produced by that industry. Conversely, those industries presented in Figure D. 1 that have a relatively small change in productivity (e.g. arts and recreation services) reflect industries that are expected to continue to require similar levels of employment to produce every $1 million of the goods and services produced by that industry.

Over time, this means every additional $1 million in economic activity (i.e. gross value added) produced by the arts and recreation services industry would generate more jobs in the Greater Hobart economies than for the same value of growth in economic activity in retail trade.

Tasmania Sub-Region & Local Government 1-Digit ANZSIC Industry Estimates

Outcomes of the state modelling process were disaggregated initially to the five Tasmanian sub-regions based on adjustments to the state employment by industry five yearly growth estimates for the periods of 2021, 2026, 2031, 2036, 2041, 2046 and 2051. Adjustments were made to the state growth rates based on two processes:

- The historical rate of employment growth in the sub-region in the 2006 to 2016 period compared to that of the state.
- The sub-region's contribution to total Tasmanian employment in the industry in 2016.

Adjusted growth rates were applied to the previous employment estimate and then rebalanced to the Tasmanian total estimate.

Outcomes for the sub-regions were disaggregated the their comprising LGAs based on adjustments to the sub-region's employment by industry five yearly growth estimates for the periods of 2021, 2026, 2031, 2036, 2041, 2046 and 2051. Adjustments were made to the sub-region growth rates based on two processes:

- The historical contribution to employment growth in the sub-region by each LGA in the 2006 to 2016 period.
- The LGA's contribution to total sub-region employment in the industry in 2016.

Adjusted growth rates were applied to the previous employment estimate and then rebalanced to the sub-regional total estimate.

The Greater Hobart sub-region for the modelling process was defined as the Statistical District, comprising the following LGAs:

- Brighton (M)
- Clarence (C)
- Derwent Valley (M)
- Glenorchy (C)
- Hobart (C)
- Kingborough (M)
- Sorell (M)

For the Greater Hobart totals provided in this report, Greater Hobart was defined as a sum of Brighton, Clarence, Glenorchy, Hobart and Kingsborough LGAs.

APPENDIX E: ROLE OF COUNCIL

The role of Council in the area of economic development is sometimes difficult to define and will vary depending on the needs of the community and the opportunities to drive economic growth. The role of Council will always fall into one of the following categories.

- Advocacy:
    - Council to act as a leader that engages with the community and other levels of government to develop commitment, energy and attitude towards economic development outcomes. Actions undertaken by Council should be based on and informed by the community's desired outcomes.
    - Lobbying for specific action, resources or change at a higher level can provide new opportunities for local communities to utilise their resources and capability.
- Facilitation:
    - Depending on the circumstances Council may pursue a range of individual or joint venture commercial activities such as land development that may serve as a catalyst to further economic development outcomes.
    - Council can act as the information link between government, business and consumers, as this information is vital in generating local awareness and demand for products and services available.
    - Council can use its resources to promote local events and activities that support business capacity building and other economic development related initiatives.
- Planning and Regulation:
    - Council's planning framework and regulatory environment provides a mechanism to regulate and/or encourage certain activities in the community, and influence economic activity.
    - The linking of economic development initiatives and outcomes through Council's key strategic and operational plans will help to ensure appropriate focus is maintained on priority areas.
- Provider of Services:
    - Service provisions and access is one of the major functions of Local Government. A consistent and reliable supply of services and information can support economic development related opportunities.
- Stakeholder:
    - There are many economic development related initiatives that are developed and implemented across the community that Council does not 'own' or is not viewed as the service provider for, but still remains a critical contributor to the successful implementation of the desired outcome.

Ultimately Council needs to have a clear understanding of the role it will play in all economic gaps and opportunities identified below and how they will drive, facilitate, encourage or communicate the desired outcomes.

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