

WEST COAST COUNCIL LAND USE PLANNING STRATEGY

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Prepared for West Coast Council

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1. INTRODUCTION

This Land Use Planning Strategy ('LUPS') has been prepared by Integrated Planning Solutions with direct input from Essential Economics and Ratio Consultants for the West Coast Council.

This report builds on the objectives of the *West Coast Community Plan 2025* and provides strategic land use direction for the area with specific focus on the towns of Strahan, Queenstown, Zeehan, Rosebery and Tullah.

The Tasmanian Government is reforming the State's planning system by introducing a single state wide planning scheme. Until this process is complete and formalized, the *West Coast Interim Planning Scheme 2013* is the operating planning scheme in operation for the West Coast municipal area.

The introduction of the new state wide planning schemes requires each Council in Tasmania to translate and convert the existing zones and overlays in the municipality to new state wide centric zone and overlay controls. It also requires the preparation of municipal specific Local Provision Schedules. The intention is to use this LUPS and associated outputs as evidence to respond to the State Government's proposed changes to the State Planning Schemes. This LUPS therefore, will inform the zone and overlay translations and conversions and the Local Provision Schedules as part of the West Coast Council's response to the State Government's Planning Scheme requirements.

Council is currently reviewing all land in the municipality to ensure the most appropriate zone is applied to each land parcel so that in turn, the most desired strategic land use planning option can be achieved for all areas within the municipal boundary.

1.1. Objectives of the Land Use Planning Strategy

The overarching objectives of this Land Use Planning Strategy are to build on the consultation work undertaken as part of the *West Coast Community Plan 2025* and provide direction to further consultation with Councillors, Council staff, community members and other stakeholders on current and future land use directions with the view of building an understanding of the land use planning processes for the municipality.

Specifically, the objectives are to:

- Provide strategic planning direction with respect to further targeted stakeholder consultation with the view to better understand community needs and wants in a land use planning context;
- Establish a solid evidence base to justify and build on identified land use planning initiatives and imperatives;
- Identify land use planning imperatives that have the potential to integrate economic and community development outcomes identified in the *West Coast Community Plan 2025*; and
- Identify transitional zoning challenges, consistency issues and emerging opportunities for the West Coast relating to the introduction of the new State

Planning Scheme and the requirement for Councils to prepare their own Local Provision Schedules.

1.2. The Methodology

The methodology for the project has four key stages.

Stage 1: Inception, background briefing & Identification of the study area

Stage 1 confirmed the Council's requirements, established indicative timelines and the approach to the project. Site visits were undertaken. A background review of the key documents was also undertaken and directions for a community engagement strategy were provided to Council for implementation. The review established the key issues and opportunities identified in policy and other background documents. This work informed the 'Strengths, Weaknesses, Opportunities and Threats' (SWOT) analysis and identified key gaps to be explored in Stage 2. At the conclusion of this stage the program and outputs of the project were clearly outlined, and a general understanding of the issues were identified.

Stage 2: Issues and Opportunities

This stage built on the analysis and the summary stemming from the field surveys and review of all the relevant information towards the identification of issues and potential opportunities for the municipality. From an economics perspective, residential, commercial, retail and industrial land was surveyed and analysed to inform the demand and supply assessment. Based on the supply and demand assessments, forecast requirements for additional residential, commercial, retail and industrial land in West Coast was determined for the short, medium and long term.

From a traffic and transport perspective, an assessment of available data informed the key deficiencies across the key municipal and arterial road network and other transport infrastructure. Likely impact of future township traffic growth and travel demands resulting from the identified strategic land use opportunities were identified and the transport network improvements required to support this growth noted. The findings from this stage were used to contribute towards the SWOT analysis paper. This draft paper formed the basis of work-shopped discussions with the Steering Committee, and key Stakeholders where additional information was gathered.

Stage 3: Draft Strategic Plan

Stage 3 used the SWOT Analysis Paper, and the discussion from it, to inform the preparation of the LUPS (this document). This document identifies the study area, the area's physical and environmental characteristics and reviews the area's demographic profile. An assessment of the key trends in development activity for the municipality, projections of use and demand as well as a review of land supply informed the suitability of land uses. The type of land uses has been primarily focused on residential, commercial, retail and industrial uses and to a lesser extent recreational and public open spaces. The Strategic Plan includes preliminary implementation recommendations.

Stage 4: Final Strategic Plan

Stage 4 will involve the collation of all data developed during previous stages to produce the final version of the Strategic Plan.

This Strategic Plan should be read in conjunction with the following documentation:

- Consultation Strategy (May 2017) prepared by Integrated Planning Solutions;
- The SWOT Analysis (June 2017) prepared by Integrated Planning Solutions, Essential Economics and Ratio Traffic consultants; and
- Economics Assessment Report (July 2017) prepared by Essential Economics.

2. The Municipal Area

The West Coast Council municipal area encompasses a large, predominantly wilderness area of approximately 9,680 square kilometres on Tasmania's west coast. The population of the municipality is around 4,430 persons (ABS, Estimated Residential Population 2016 as stated in the Essential Economics Assessment Report July 2017). The area is located approximately 240 kilometers (around 3.5 hours along the Lyle Highway) from Hobart and approximately 243 kilometres (around 3.5 hours along the Bass highway) from Launceston.

Geographically, the municipality covers much of the west of Tasmania. It is the largest Local Government Area of Tasmania by area and the second least densely populated. Key townships within the West Coast are those of Queenstown, Strahan, Zeehan, Rosebery and Tullah. The smaller coastal hamlet settlements of Trial Harbour and Granville Harbour are also noteworthy. Queenstown, is the municipality's largest town and civic hub with a current population of around 1,900 persons (as noted in the Essential Economics Economics Assessment Report July 2017). West Coast's other notable topographical features include Macquarie Harbour and the Franklin-Gordon Wild Rivers National Park, as well as the South West Conservation Area. It takes in the West Coast Range as well as portions of World Heritage areas. Cradle Mountain, one of the region's major tourism destinations, is around 45 minutes by car from Tullah in the north of the municipality. Located approximately one-hour north of the municipality's northern reaches, the major regional service centre for the West Coast is Burnie.

Historically, the West Coast's settlement, cultural and economic history is largely centered on mining, particularly the townships of Queenstown, Zeehan and Rosebery. Most famous, is the Mt Lyell Mining Company based in Queenstown, a nationally prominent copper mining entity from late 1890s to mid 1990s, the mine is central to the history of the West Coast region. Although not as active as it once was, mining remains an integral component of the local economy.

Tourism is also an important component of the local economy, with Strahan and to a lesser extent Queenstown the predominant tourist destinations. Key attractions include the Gordon River Cruises and West Coast Wilderness Railway. Strahan, located on Macquarie Harbour, was historically settled as a port serving fishing, mining and timber activities. In recent times Strahan has developed an aquaculture industry (salmon farming), which compliments it as a tourism destination. However, the most unique feature of the West Coast is arguably its areas of vast wilderness and mountainous terrain. The municipality's mountainous topography is of particular significance both from a topographical and also in an economic context.

Figure 1: West Coast Council - Locational Context



Source: Essential Economics with MapInfo, BingMaps and StreetPro

2. PLANNING CONTEXT

2.1. Planning Controls

The statutory planning controls, which sit within the State legislative planning framework together with the state and regional planning objectives must be considered as part of any strategic planning exercise. This section provides an overview of the key controls in the Interim *West Coast Planning Scheme 2013* and the State and regional planning objectives that are applicable to the broader region.

2.1.1. Zones

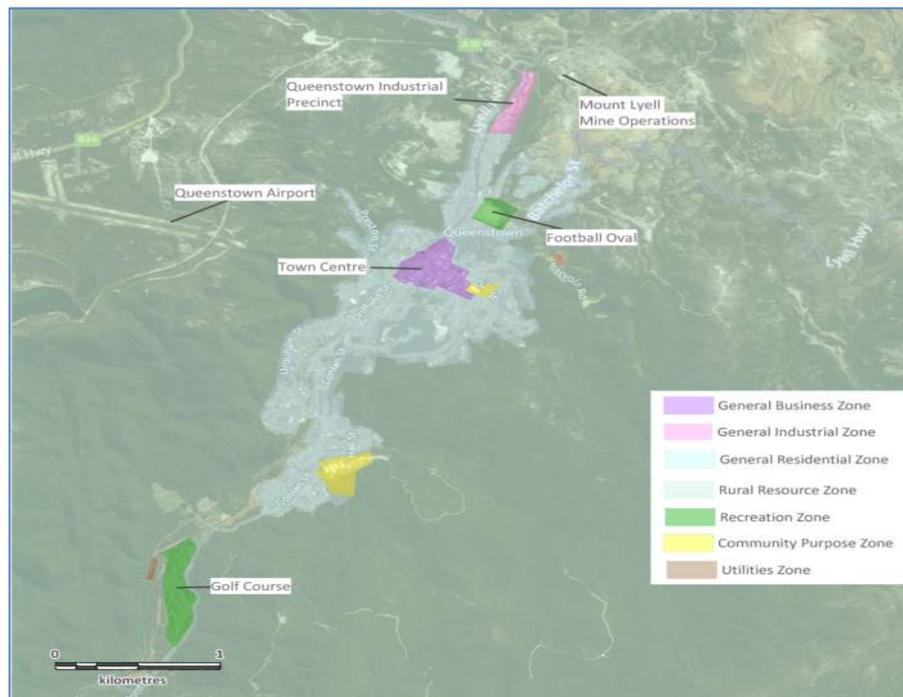
The objectives of this project are to assess the suitability of existing residential, commercial and industrial land in the West Coast municipal area with a focus on the townships of Queenstown, Strahan, Zeehan, Rosebery and Tullah. On this basis, zoning maps have been generated for the towns of Queenstown, Strahan, Zeehan, Rosebery and Tullah.

Refer to the detailed zoning maps of each of the towns in the appendices.

2.1.2. Queenstown

Much of the municipality's general residential zoned land is located in the town of Queenstown. Other key areas of note are the Queenstown industrial precinct to the north of the town near the Mt Lyell mining operations and the community purpose zone to the south. There are some public park and recreational areas zoned 'Community Purpose' Zone. The key site being the football oval. There are also various allotments in and around Queenstown that are zoned Rural Resource Zone.

Figure 2: Queenstown Zoning



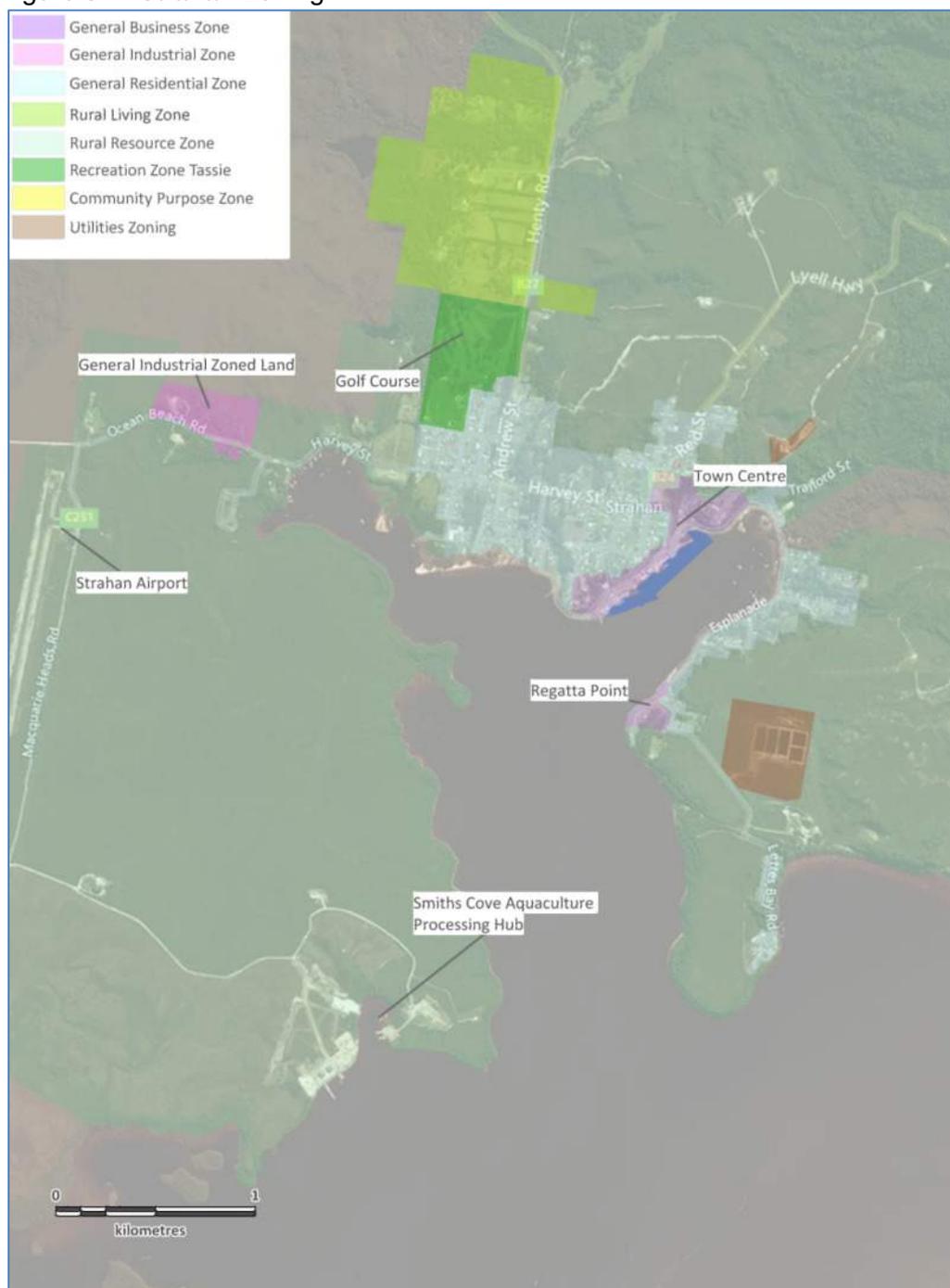
Source: Essential Economics with MapInfo and Bing Maps

See Appendix 1 for more maps.

2.1.3. Strahan

Strahan's town centre is positioned around the general business zoned strip of shops and businesses along the esplanade. Of note is also the general industrial zoned land to the west, and the rural living and recreational zoned land to the north, namely the golf course. There are also larger parcels of Rural Resource zoned land outside of the town centre area.

Figure 3: Strahan Zoning



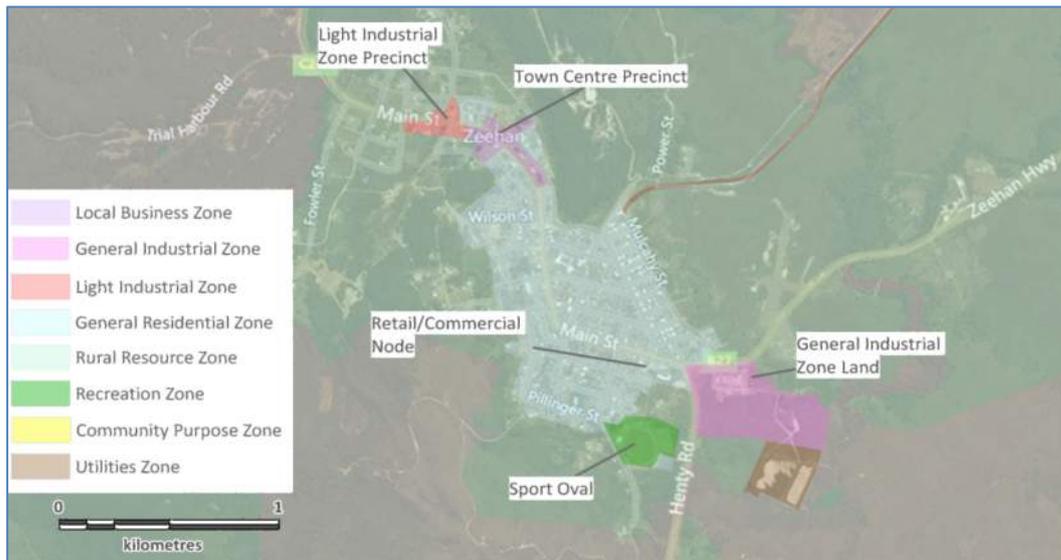
Source: Essential Economics with MapInfo and Bing Maps

See Appendix 1 for more maps.

2.1.4. Zeehan

Zeehan has a good town layout and combination of zones. The mix includes the local business zoned land around the town centre and a light industrial precinct to the north west of the town centre. There is a general industrial zoned area to the south with a retail/ commercial node to the west of that. There is also a sporting oval off Henty Road noteworthy of consideration and larger allotments of Rural Resource zoned land around the town.

Figure 4: Zeehan Zoning



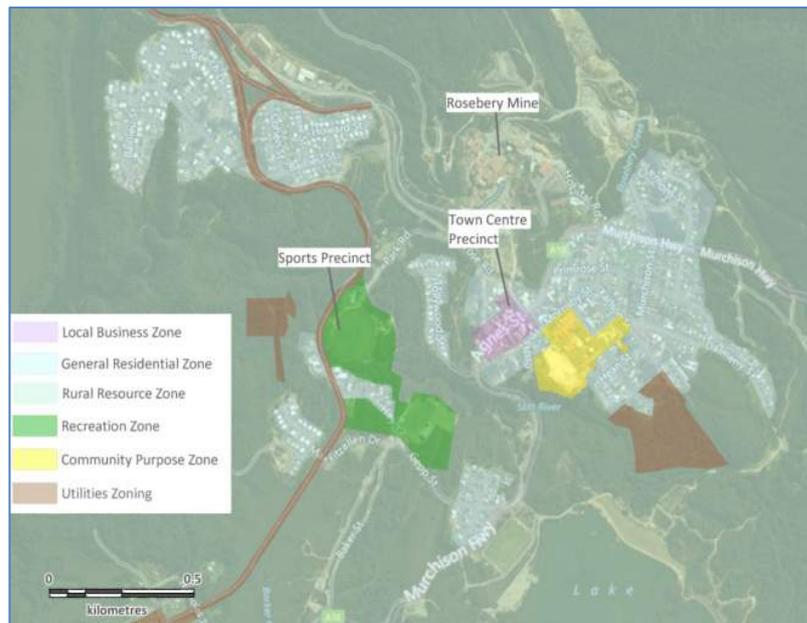
Source: Essential Economics with MapInfo and Bing Maps

See Appendix 1 for more maps.

2.1.5. Rosebery

There are various parcels of land set aside for utilities in Rosebery. A local business zone surrounds the town centre and there is a well used community purpose zone close by. This is where the Rosebery Park Oval is located. Rural and agricultural land is located in different pockets around the town.

Figure 5: Rosebery Zoning



Source: Essential Economics with MapInfo and Bing Maps

See Appendix 1 for more maps.

2.1.6. Tullah

Tullah is one of the gateways to the West Coast. It hosts primarily general residential and rural resource zoned land. There is a sports/ recreation reserve that should be noted and large Rural Resource zoned parcels outside the immediate context of the town centre.

Figure 6: Tullah Zoning



Source: Essential Economics with MapInfo and Bing Maps

See Appendix 1 for more maps.

2.1.7. *Overlays and Codes*

There are also a range of overlays and codes that must be considered as part of the overall assessment in determining the suitability of zoning controls in the municipal area. In this context the following codes are considered relevant to the strategic zoning considerations.

The Bushfire Prone Areas Code (E1), the Airport Impact Management Code (E2), the Clearing and Conversion of Vegetation Code (E3), the Change in Ground Level Code (E4), the Local Heritage Code (E5), the Hazard Management Code (E6), the Sign Code (E7), the Telecommunications Code (E8), the Traffic Generating Use and Parking Code (E9), and the Water and Waterways Code (E10).

Given the focus of the project is the assessment of the suitability of existing residential, commercial and industrial land within the townships of Queenstown, Strahan, Zeehan, Rosebery and Tullah; this project does not go into the detailed implications of each of these overlays and codes within the municipality. It should be noted that these overlays and codes as they currently stand are not of great relevance given the townships in consideration are for the most part established and any existing or proposed changes to land zoned residential, commercial and industrial land. Overlay and code controls can be accommodated as a secondary matter.

3. THE LEGISLATIVE FRAMEWORK

3.1. Land Use Planning and Approvals Act 1993 (Tas)

The preparation and amendment of a planning scheme (including zone, overlay and local provision schedules amendments) require preliminary approval from State Government through the Planning Commission. This is a requirement of the *Land Use Planning and Approvals Act 1993 (Tas)*. All proposed amendments must further the objectives set out in Schedule 1, which reflect the objectives of Tasmania's Resource Management and Planning system. These State planning objectives are detailed below.

3.2. State Planning Objectives

Both the *Land Use Planning Approvals Act 1993 (Tas)* and the *State Policies and Projects Act 1993 (Tas)* sit within Tasmania's Resource Management and Planning System (RMPS). The objectives of the RMPS are to:

- (a) promote the sustainable development of natural and physical resources and the maintenance of ecological processes and genetic diversity;
- (b) provide for the fair, orderly and sustainable use and development of air, land and water;
- (c) encourage public involvement in resource management and planning
- (d) facilitate economic development in accordance with the objectives set out in the above paragraphs; and
- (e) promote the sharing of responsibility for resource management between the different spheres of government, the community and industry in the State.

The objectives of the *Land Use Planning Approvals Act 1993 (Tas)* (LUPAA) in addition to the RMPS objectives are to (Part 2, Schedule 1):

- (a) require sound strategic planning and coordinated action by State and local government;
- (b) establish a system of planning instruments to be the principal way of setting objectives, policies and controls for the use, development and protection of land;
- (c) ensure that the effects of the environment are considered and provide for explicit consideration of social and economic effects when decisions are made about the use and development of land;
- (d) require land use and development planning and policy to be easily integrated with environmental, social, economic, conservation and resource management policies at State, regional and municipal levels;
- (e) provide for the consolidation of approvals for land use or development and related matters, and to coordinate planning approvals with related approvals;
- (f) secure a pleasant, efficient and safe working, living and recreational environment for all Tasmanians and visitors to Tasmania;
- (g) conserve those buildings, areas or places which are of scientific, aesthetic, architectural or historical interest, or otherwise of special cultural value;
- (h) protect public infrastructure and other assets and enable the orderly provision and coordination of public utilities and other facilities for the benefit of the community; and
- (i) provide a planning framework, which fully considers land capability.

3.3. State and Regional Policies

3.3.1. State Planning Policies

State planning policy provides direction and guidance for the preparation of local strategy. There are various state policies relevant to the municipality. The most relevant include:

- The State Policy on the *Protection Agricultural Land 2009* (PAL), which reflects a community obligation to protect and conserve the productive capacity of agricultural land as a growth medium. The policy seeks to prevent unnecessary and permanent conversion of agricultural land and to minimise unreasonable risk for constraint on agricultural use by other land use, including urban expansion, industry, rural lifestyle living and infrastructure development.
- The State Policy on *Water Quality Management 1997* applies to all surface waters, including coastal waters, and ground waters, other than privately owned waters that are not accessible to the public or waters in any tank, pipe or cistern. The purpose of the policy is to achieve the sustainable management of Tasmania's surface water and groundwater resources by protecting or enhancing quality, while allowing for sustainable development in accordance with the objectives of Tasmania's Resource Management and planning system.
- Any amendment to the planning scheme must be in accordance with State Policies.

3.3.2. Regional Planning Policies

The *Cradle Coast Regional Land Use Planning Framework "Living on the Coast"*, known as the *Cradle Coast Regional Land Use Strategy* ('CCRLUS') provides a regional perspective on land use planning issues of significance for all municipal areas within the Cradle Coast region. The CCRLUS outlines specific policy direction in terms of urban settlements in the region. It advocates a sustainable approach to the land use planning particularly around settlement patterns with the view of supporting inclusive communities where healthy, safe and pleasant places are provided for people to live work, play and invest. The Strategy recognises that the settlements in the Cradle Coast region are small in size, geographically dispersed and separate, but also physically, economically and socially well-connected and that each settlement has a distinct identity.

Any amendment to the planning scheme must as far as practicable, be consistent with the regional land use planning framework. From the CCRLUS, the following must guide and direct the vision and strategy for the region:

- Assume a low growth scenario under which demand is driven by internal population change and low rates of inward migration;
- Anticipate to retain a low rate of housing demand through falling occupancy rates and low rates of inward migration;
- Promote established settlement areas as the focus for growth and development;
- Promote optimum use of land capability and the capacity of available and planned infrastructure service;

- Implement structure plans and regulatory instruments for each centre which –
 - Identify arrangements for intensification through infill, redevelopment and conversion of vacant and under-developed land;
 - Avoid exclusion or restraint on areas significant for natural or cultural value, resource development or utilities in the vicinity of the designated urban boundary;
 - Minimise exposure of people and property to unacceptable levels of risk to health or safety;
- Local settlements management plans should ensure compatibility with local identity and established character and create centres which are functional, attractive and sustainable;
- Each settlement provides an appropriate level of local development and infrastructure facilities to meet locally specific daily requirements in employment, education, health care, retail, and social and recreation activity for its resident population; and
- Facilitate convenient access in each settlement area to food and convenience goods retailers and services.

The CCRLUS makes it clear that there is a capacity within the existing urban settlements for the predicted low population growth within the region. The emphasis is on consolidation of existing urban settlements with urban expansion contiguous with established settlement areas.

The Cradle Coast NRM Strategy 2015

The *Cradle Coast NRM Strategy 2015* requires planning to have regard to maintaining the carrying capacity of the region's natural systems. The cumulative impact of increased settlement and economic activity on the capacity and health of natural systems must be managed to provide sustainable life support for an increased population and demand for resources.

West Coast Community Plan 2025

The *West Coast Community Plan 2025* provides a vision for the municipality for the future. The plan highlights the outcomes that resulted from a widespread community consultation and the strategies that will be implemented to achieve the highlighted outcomes including the roles of key stakeholders and the community in doing this. The key areas discussed in the plan are the vision and objectives for the community, the economy, the infrastructure, the environment and key alliances and partnerships. The essence of the plan is high level in nature and summarised in the mission statement, which is "We will work together in partnership to provide and continually improve the facilities, services and infrastructure that will serve the needs of the community".

4. PLANNING CONSIDERATIONS

4.1. Overview

In determining the strategic land use planning direction for the future of the West Coast there are three key questions that need to be addressed within the planning context for the municipality. These are:

- What is the current planning context for the West Coast?
- What are the strengths, weaknesses, opportunities and threats within the local strategic planning context?
- Having regard to the *West Coast Community Plan 2025* and the existing broader State and Regional Planning Policies, what are the key considerations for the future land use planning within the West Coast?

The West Coast is a unique area within the State of Tasmania.

It is concluded that there are a number of strengths and opportunities for the municipality of the West Coast despite current threats and opportunities that have emerged from the analysis and assessment of the local context associated with this strategic plan.

By way of summary, the key findings taking into account input from planning, economic and traffic and transport disciplines are:

- The West Coast Council is among the most isolated municipalities in Tasmania, located around a three-hour drive from Hobart and over two hours from Launceston.
- Geographically, the West Coast encompasses a large predominantly wilderness area of approximately 9,680 square kilometers. It has a rich mining history and various opportunities in the tourism sector.
- The West Coast Council has a small population of some 4,380 persons in 2017 and the total number has been in long-term decline for many years. Tasmania's official population projections Tasmania and Its Local Government Areas (2014) forecast a continuation in the decline in population.
- Actions must be taken to address the West Coast's trend of population decline. A stabilisation in population, or preferably some growth, is an outcome that should be sought to be achieved by West Coast Council. Accordingly, population increase must be considered in terms of the West Coast's future land development context and strategic planning framework.
- The economic context of the West Coast is informed to a large extent by the dual drivers of mining and tourism. The viability of mining in the region is significantly informed by fluctuations in commodity prices.
- The West Coast has very low levels of residential, commercial and industrial development activity relative to the West & North West (SA4) region. Low levels of demand for residential, commercial and industrial land is a product of the

municipality's low (declining) population and narrow industry and employment base.

- The West Coast accommodates some 10,010 square meters of shop front floor space. In the order of 38% of the municipality's retail floor space is located in Queenstown. A high level of shop front vacancy was observed for the municipality as a whole (18%) and in all centers apart from Strahan.
- Access to the area relies on the State Road Network, notably Lyell Highway (to Derwent Valley/Hobart) and Murchison Highway (to North West/Burnie and Launceston). Recent and on-going improvements to the State Road Network have improved access to the region.
- Strahan Airport provides for charter flight services only. Queenstown Airport is unregistered with use/landings subject to Council permission. Both airport sites have good road access, with opportunities existing for possible expansion.

Key implications for zoning in each major townships in the municipality are as follows:

4.1.1. Queenstown

- A sufficient supply exists in the General Residential Zone and General Business Zone.
- Investigate the potential for an industrial precinct at the Queenstown Airport (or another appropriate site) to accommodate local service industry, as the current General Industrial Zoned land is substantially developed.
- There exist an array of historic heritage buildings and other infill sites that need to be explored from a land use planning perspective.
- There exist an array of historic heritage buildings and other infill sites that need to be explored from a land use planning perspective.

4.1.2. Strahan

- Sufficient supply exists in General Residential Zone, although the future direction of residential growth may need to be considered in the long-term or when warranted by market demand.
- The existing quantum of land in the Local Business zone is sufficient. Parcels in the area of the IGA express and abutting Reid Street could accommodate the future development of some 2,500m² of ground floor retail/commercial floor space.
- Existing supply of General Industrial zoned land is uncleared and has no occupants (apart from the Waste Transfer Station). Investigate the potential for an industrial precinct at a site with less development constraints (in terms if ease of development and cost).

4.1.3. Zeehan

- Sufficient supply exists in the General Residential Zone, General Industrial Zone and Local Business Zone.
- Investigate potential for low density residential land supply on land currently zoned Rural Resource
- The possibility may exist for zoning the General Residential land accommodating the IGA Express supermarket and Hemskirk Motor Hotel to Local Business, as well as the small area of General Residential land that accommodates Hotel Cecil, GBE offices and United Service Station.
- The supply of vacant land in the Light Industrial Zone is limited and the potential for this precinct to be extended should be investigated.

4.1.4. Rosebery

- Sufficient supply exists in the General Residential Zone and Local Business Zone.
- The possibility may develop for an extension to the Local Business zoned precinct to include land abutting Agnes Street (to the south) between Arthur Street and Primrose Street, which effectively already forms part of Rosebery's town centre.
- No land zoned for industrial use. Consider the potential for a local service industrial precinct to be located in the township, acknowledging that the township has only a limited supply of developable land.

4.1.5. Tullah

- Sufficient supply exists in General Residential Zone. These areas are supported by an established street network.
- Identify existing Rural Resource Zone land as future long-term residential growth area and zone accordingly (the use of a 'holding zone' may be warranted).
- It would be appropriate for the Farrell Street retail/commercial node to be zoned for business use. Rezoning of the General Residential land abutting the Murchison Highway between Ardyn Street and Elliot to a business or mixed use may be warranted.
- No land zoned for industrial use. Consider the potential for a local service industrial precinct to be located south of Hean Street and adjacent to the existing industrial use.

4.1.6. Granville Harbour and Trial Harbour

- Sufficient supply of land appropriate for residential development in both the Low Density Residential Zone and Rural Resource Zone.
- Access is limited to lower order/standard unsealed roads.

- Preference to consolidate residential land under one zone.

These matters are discussed in more detail below.

4.2. What is the current planning context for the West Coast?

From a planning perspective, the geography of the region is an important consideration in determining future land zoning and uses in each of the key towns. In considering the strategic planning context, the economic trends and conditions must also be understood. Collaboratively, these factors set the local planning framework to be assessed in determining the best zoning controls for the community and region in response to the objectives of the *West Coast Community Plan 2025*. These influencing factors are outlined below.

4.2.1. Geographic context for the region

As outlined earlier in Section 2 of this report, the west Coast municipal area encompasses a large predominantly wilderness area of approximately 9,680 square kilometers on Tasmania's West Coast. Geographically, the municipality covers much of the west of Tasmania. It is the largest Local Government Area of Tasmania by area and the second least densely populated. Key townships within the West Coast are those of Queenstown, Strahan, Zeehan, Rosebery and Tullah. The smaller coastal hamlet settlements of Trial Harbour and Macquarie Harbour are also noteworthy. Queenstown, is the municipality's largest town and civic hub with a current population of around 1,900 persons (as noted in the Essential Economics Economics Assessment Report July 2017). West Coast Council's other notable topographical features include Macquarie Harbour and the Franklin-Gordon Wild Rivers National Park, as well as the South West Conservation Area. It takes in the West Coast Range as well as portions of World Heritage areas. Cradle Mountain, one of the region's major tourism destinations, is around 45 minutes by car from Tullah in the north of the municipality. Located approximately one-hour north of the municipality's northern reaches, the major regional service centre for the West Coast is Burnie.

Historically, the West Coast Council's settlement, cultural and economic history is largely centered on mining, particularly the townships of Queenstown, Zeehan and Rosebery. Most famous, is the Mt Lyell Mining Company based in Queenstown, a nationally prominent copper mining entity from late 1890s to mid 1990s, the mine is central to the history of the West Coast region. Although not as active as it once was, mining remains an integral component of the local economy.

Tourism plays an important role, with Strahan and to a lesser extent Queenstown the predominant tourist destinations. Key attractions include the Gordon River Cruises and West Coast Wilderness Railway. Strahan, located on Macquarie Harbour, was historically settled as a port serving fishing, mining and timber activities. In recent times Strahan has developed an aquaculture industry (salmon farming), which compliments it as a tourism destination. However, the most unique feature of the West Coast is arguably its areas of vast wilderness and mountainous terrain. The municipality's mountainous topography is of particular significance both from a topographical and also in an economic context.

4.2.2. Key Factors

As outlined in the Essential Economics Assessment, the following key factors are important; population trends, population projections, socio-economic characteristics, key economic indicators and key industries.

4.2.2.1. Population trends

The West Coast municipality has a relatively small population, which has observed a historic, long-term trend in declining numbers. Such a trend is a common occurrence for isolated municipalities in Australia's regional areas.

The current population of West Coast Council is approximately 4,430 persons (2016 data), which is less than one-half of the estimated population of 9,310 persons in 1988. Over the period 1988 to 2016 the municipality experienced a substantial decline of 4,870 persons or 52% of its 1988 population level.

The predominant factor driving this long-term decline in population has been reduced local employment in the mining sector. This sector experienced a number of substantial changes, including mine closures, reduced mining activity and increased automation of labour on mine sites, as well as local mining operations employing a large proportion of workers from beyond the municipality (referred to locally as 'drive-in-drive-out workers').

The relatively small population of the West Coast Council and its long-term decline presents major challenges for those stakeholders with an interest in attracting business and land development activities to the municipality. The small and declining population levels in individual towns also provide major challenges regarding the upkeep of local service provision.

Historic population trends for West Coast Council and its main towns, from 2001 to 2016, are compared to the West & North West Tasmania SA4 (ABS statistical area level 4) in Table 1 on the following page.

In relative terms, the township of Strahan experienced the most stable population of all major West Coast towns between 2001 and 2016, with its population declining by an average of around -10 persons annually (-0.8% per annum). In contrast to the municipality's major towns, the balance of the municipality – which includes the coastal settlements of Trial Harbour and Granville Harbour – observed a small increase of around +30 persons from 2001 to 2016.

4.2.2.2. Population projections

The Tasmanian Department of Treasury report *Tasmania and Its Local Government Areas* (2014) provides the official State Government population projections for Tasmania and its individual municipalities, based on 2011 ABS Population and Housing Census as a base for the forecasts. For the purposes of this study, the Essential Economics team has adjusted the Department of Treasury forecasts to reflect the latest ABS 2016 Estimated Residential Population release (Cat. No. 3218.0). The adjusted population projections for both the West Coast Council and West & North West Tasmania (SA4) are presented in Table 2. These projections show West Coast's population declining by an average of -40 persons per annum (-1.1% per annum) in the period 2017 to 2032, representing an overall loss of -670 persons. In contrast, the population of the West & North West (SA4) region of Tasmania is forecast to increase by around 0.3% per annum for 2017 to 2032, with this growth predominately attributed to population increase in the municipalities of Devonport, Kentish, Central Coast and Latrobe.

Table 1: Population Forecasts, 2011-2032

Location	2011	2017	2022	2027	2032	Change, 2017-2032
Population (No.)						
West Coast	4,890	4,380	4,100	3,890	3,710	-670
West & North West TAS	113,970	114,170	116,470	118,520	120,120	5,950
Average Annual Growth (No.)						
West Coast		-90	-60	-40	-40	-40
West & North West TAS		30	460	410	320	400
Average Annual Growth (%)						
West Coast		-1.8%	-1.3%	-1.0%	-0.9%	-1.1%
West & North West TAS		0.0%	0.4%	0.3%	0.3%	0.3%

Source: Department of Treasury and Finance, *Tasmania & Its Local Government Areas*, 2014

Note: Figures rounded to nearest 10

Population projections for the main townships in the West Coast municipality have been prepared on the basis of the municipal-wide projections shown in Table 1 and recent trends in population at a small area level. These forecasts are shown in Table 2. The forecasts assume each town's share of total West Coast population remained constant at 2016 levels.

As shown in Table 2, based on official State Government population projections, each town would continue their historic trend of population decline. This would have significant implications for economic activity in the municipality, including the provision and development of retail, commercial, residential and industrial land uses.

For West Coast Council, the State Government's population projections reflect an extrapolation of the municipality's historic trend population decline. In effect, this represents the continuation of a 'business as usual' scenario.

Table 2: Population Forecasts by West Coast Council Township, 2011-2032

Region	2011	2017	2022	2027	2032	AAGR	AAGR
<i>Population (No.)</i>							
Queenstown	2,070	1,880	1,760	1,670	1,590	-20	-1.1%
Strahan	690	600	570	540	510	-10	-1.1%
Zeehan	760	670	630	600	570	-10	-1.1%
Rosebery	960	850	800	750	720	-10	-1.1%
Tullah	200	190	180	170	160	0	-1.1%
<i>Balance</i>	<i>210</i>	<i>190</i>	<i>180</i>	<i>170</i>	<i>160</i>	<i>0</i>	<i>-1.1%</i>
Total Council	4,890	4,380	4,120	3,900	3,710	-40	-1.1%

Source: Essential Economics; Department of Treasury and Finance, *Tasmania & Its Local Government Areas*, 2014 ABS, Estimated Resident Population Estimates at SA1 Level

Note: Figures rounded to nearest 10

Over approximately the past 30 years, West Coast municipality's population has declined by around 4,500 persons. As a result, basic service provision has become marginal and will become increasingly so if declining population and economic outcomes are not addressed. An urgent need exists to address this historic cycle of declining population, service provision and economic and social outcomes.

It is vital for the future of the West Coast region that Council, the local community and other stakeholders, including local businesses and the Tasmanian Government, draw their attention towards attracting economic activity that will, in turn, attract new residents and economic activity to the region.

While the preparation and implementation of a strategic planning framework will be important in highlighting these issues and opportunities, it will also be important to develop an action plan that encourages strategic investments geared for economic development in the municipality.

It will also be important that planners who administer the planning framework ensure positive economic outcomes through the provision of appropriately zoned industrial land and the positive management of land use and development, including the minimisation of fragmented patterns of development and land use conflict.

Accordingly, the economic analysis presented in this study is based on the expectation that West Coast Council can forge a new 'business trajectory' that promotes population and investment growth. On this basis, the strategic planning outcomes in relation to zoning and related aspects in the West Coast Strategic Planning Project would plan for population stabilisation followed by some growth over time.

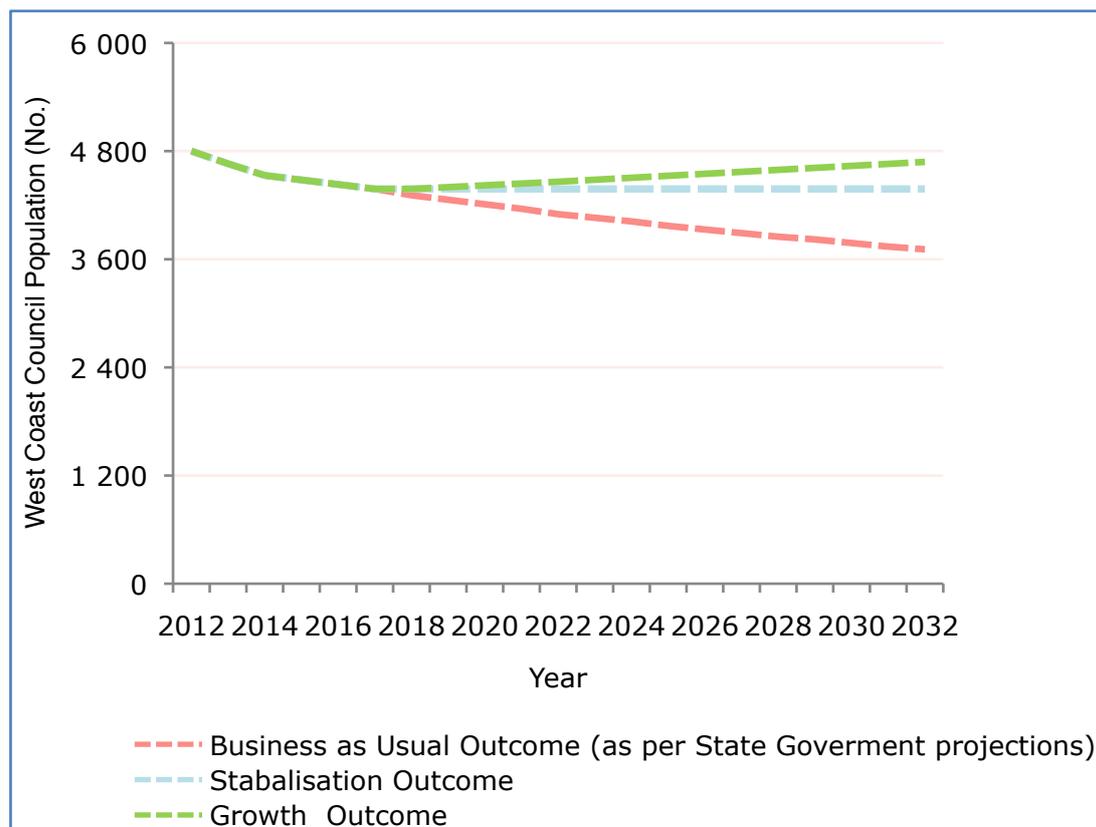
Figure 7 shows how a stabilised population outcome (with some growth) would compare against the 'business as usual' as forecast by Tasmania and Its Local Government Areas (2014). The "Growth Outcome" population projection for 2017 to 2032 shows an increase of approximately 970 persons over the 'Business-as-Usual' projection. This population growth would start to materialise in 2019-2020, after economic development initiatives have been introduced and initial strategic

investments undertaken.

While it is acknowledged that potential exists for an increase in population in the near future due to the opening/re-opening of West Coast mines, this aspect had not been factored into the population increase scenario due to the uncertainty surrounding the mining sector in general.

The additional residents under the Growth Outcome scenario would be spread throughout the municipality, although it is likely that the townships which attract the larger share of investment and are attractive places to live and work will attract the largest amount of population growth. Table 3 shows the population increase for each West Coast town assuming that each town's share of the municipal population remains constant at 2016 levels.

Figure 7: Alternative Population Projections, 2017-2032



Source: Essential Economics; Department of Treasury and Finance, *Tasmania & Its Local Government Areas*, 2014; ABS, Estimated Resident Population Estimates at SA1 Level

Table 3: Population Forecasts by West Coast Council Township (Growth Outcome), 2011-2032

Region	2011	2017	2022	2027	2032	AAGR (No.)	AAGR (%)
Population (No.)							
Queenstown	2,070	1,880	1,910	1,960	2,010	10	0.4%
Strahan	690	600	610	630	640	3	0.4%
Zeehan	760	670	680	700	720	3	0.5%
Rosebery	960	850	870	890	910	4	0.5%
Tullah	200	190	190	200	200	1	0.3%
Balance	210	190	190	200	200	1	0.3%
Total Council	4,890	4,380	4,450	4,580	4,680	20	0.4%

Source: Essential Economics; ABS, Estimated Resident Population Estimates at SA1 Level
 Note: Figures rounded

4.2.2.3. Socio-economic Characteristics

The socio-economic characteristics of residents of West Coast Council, summarised in Table 4, are based on both 2011 and 2016 ABS Census of Population and Housing due to the full suite 2016 Census statistics not being available at the time of writing.

Overall, residents of West Coast Council, compared with Tasmania as a whole, are generally younger, have lower median household income, lower household size, and are more likely to own their own home. Housing costs in terms of average monthly mortgage repayments and weekly rents in the municipality are significantly lower than Tasmania as a whole.

Relatively high shares of the municipality's workers are employed as technicians and trades workers, with a low share employed as managers and professionals. The significantly larger share of persons employed in the primary sector can be attributed to the mining activities in the municipality.

Table 4: West Coast Council Socio-Economic Characteristics, 2016 & 2011 Census

Category	Queenstown	Strahan	Zeehan	Rosebery	Tullah	West Coast	Tasmania
Income (2016 Census)							
Median household income (weekly)	\$764	\$1,312	\$971	\$1,227	\$820	\$910	\$1,100
Age Structure (2016 Census)							
Children aged 0-14	18.0%	17.2%	20.3%	12.9%	11.0%	18.5%	17.7%
People aged 65 years and over	18.5%	17.5%	13.5%	21.1%	23.4%	17.1%	19.4%
Median Age (years)	45	41	42	41	46	44	42
Dwelling Structure (2016 Census)							
Separate house	95.1%	98.2%	91.9%	97.9%	43.5%	92.7%	87.6%
Occupancy rate	72.4%	65.0%	70.7%	56.9%	57.8%	65.1%	86.0%
Average household size	2.1	2.2	2.1	2.1	2.0	2.1	2.3
Tenure Type (2016 Census)							
Owned outright	47.5%	33.7%	34.9%	37.4%	50.0%	41.9%	35.7%
Owned with a mortgage	22.3%	27.4%	28.1%	22.1%	24.3%	24.1%	33.5%
Rented	26.2%	30.5%	34.6%	37.0%	25.7%	29.7%	27.3%
Other tenure type	0.4%	1.1%	1.4%	3.5%	0.0%	0.7%	0.8%
Housing Costs (2016 Census)							
Median monthly mortgage repayment	\$495	\$942	\$560	\$531	\$876	\$673	\$1,300
Median weekly rents	\$150	\$220	\$160	\$100	\$140	\$135	\$220
Occupation (2011 Census)							
Managers & professionals	19.3%	25.7%	12.4%	18.8%	21.8%	19.5%	31.4%
Clerical & sales workers	26.8%	26.6%	19.5%	22.6%	25.3%	24.6%	35.3%
Technicians & trades workers	19.9%	13.1%	15.1%	15.3%	24.1%	17.7%	15.1%
Machinery operators & drivers	19.4%	11.3%	30.2%	29.8%	21.8%	21.8%	6.8%
Labourers & related workers	14.5%	23.2%	22.8%	13.5%	6.9%	16.3%	11.5%
Industry of Employment							

(2011 Census)							
Primary sector	29%	25%	34%	50%	37%	34%	6%
Secondary Sector	10%	10%	15%	6%	7%	11%	17%
Tertiary sector	61%	65%	51%	44%	56%	56%	77%
Producer services	13%	11%	5%	7%	20%	10%	20%
Consumer services	48%	54%	46%	36%	36%	45%	58%

Source: ABS Census of Population & Housing 2011 and 2016

4.2.2.4. Key Economic Indicators

A range of key economic indicators and data sets relevant to West Coast Council's land development context as articulated by the Essential Economics team, are provided in this Section and include Gross Regional Product (GRP) by industry sector (Table 5); employment by industry sector (Table 6); labour force and unemployment trends based on Australian Department of Employment small area figures (Table 7 and Figure 8); and building approvals by sector (Table 8).

The information provided can be summarised as follows:

- Gross revenue/ output in the West Coast in 2016 totaled approximately \$900 million, with total employment involving around 2,200 jobs (2016 Census data not yet available).
- Mining is the key industry in the West Coast municipality in terms of both GRP and employment. Over half (58.6%) of the municipality's total GRP can be attributed to mining.
- Although the number of jobs and share of employment in the mining industry increased from 2006 to 2011, it is understood that employment has subsequently declined due to the closure of some mining operations, including Mount Lyell at Queenstown. Note, the ABS Census data for employment by industry for 2016 will become available later in 2017.
- Although secondary to mining, the accommodation and food, retail, and education & training sectors are also significant in terms of local employment. Tourism is a significant factor, which contributes to investment and employment outcomes in the accommodation, food and retail sectors on the West Coast.
- The number of unemployed persons on the West Coast increased by 5.9% from 2011 to 2016, and this can be significantly attributed to the closure of some mining operations, including Mount Lyell. Local unemployment increased significantly post-2011 to a high of 11.1% in December 2012, and has subsequently declined to 7.8% as at December 2016.
- Building approvals data is an economic proxy used to gauge building and development activity for a region. Overall, West Coast municipality has very low levels of residential, commercial and industrial development activity relative to the West & North West (SA4) region. A moderate level of building and development

activity occurs in the municipality in terms of visitor accommodation and this activity is almost wholly located at the tourist hub of Strahan and predominately comprises works on existing dwellings/accommodation.

Table 5: Gross Revenue/ Output by Industry Sector in West Coast Council, 2016

Industry	Gross Regional Product	Share
<u>Typically Located in Activity Centres</u>		
Retail Trade	\$12.5m	1.4%
Accommodation & Food Services	\$46.2m	5.1%
Financial & Insurance Services	\$7.1m	0.8%
Rental, Hiring & Real Estate Services	\$41.4m	4.6%
Professional, Scientific & Technical Services	\$5.6m	0.6%
Public Administration & Safety	\$16.8m	1.9%
Health Care & Social Assistance	\$7.6m	0.8%
Arts & Recreation Services	<u>\$2.5m</u>	0.3%
Sub-total	\$139.7m	15.5%
<u>Typically Located in Industrial Areas</u>		
Manufacturing	\$49.7m	5.5%
Construction	\$60.2m	6.7%
Wholesale Trade	\$6.8m	0.8%
Transport, Postal & Warehousing	<u>\$23.3m</u>	2.6%
Sub-total	\$140.0m	15.6%
<u>Other Industries</u>		
Agriculture, Forestry & Fishing	\$21.2m	2.4%
Mining	\$527.1m	58.6%
Electricity, Gas, Water & Waste Services	\$29.3m	3.3%
Information Media & Telecommunications	\$2.1m	0.2%
Administrative & Support Services	\$19.0m	2.1%
Education & Training	\$12.8m	1.4%
Other Services	<u>\$8.0m</u>	0.9%
Sub-total	\$619.5m	68.9%
Total	\$899.2m	100%

Source: REMPLAN

Table 6: Employment by Industry in West Coast (C), 2006 and 2011

Industry	2006		2011	
	Jobs	Share	Jobs	Share
<u>Typically Located in Activity Centres</u>				
Retail Trade	140	6.9%	140	6.1%
Accommodation & Food Services	340	16.7%	300	13.1%
Financial & Insurance Services	10	0.5%	10	0.4%
Rental, Hiring & Real Estate Services	10	0.5%	10	0.4%
Professional, Scientific & Technical Services	40	2.0%	30	1.3%
Public Administration & Safety	110	5.4%	110	4.8%
Health Care & Social Assistance	100	4.9%	80	3.5%
<u>Arts & Recreation Services</u>	<u>20</u>	<u>1.0%</u>	<u>20</u>	<u>0.9%</u>
Sub-total	770	37.9%	700	30.6%
<u>Typically Located in Industrial Areas</u>				
Manufacturing	100	4.9%	80	3.5%
Construction	100	4.9%	110	4.8%
Wholesale Trade	20	1.0%	20	0.9%
<u>Transport, Postal & Warehousing</u>	<u>120</u>	<u>5.9%</u>	<u>90</u>	<u>3.9%</u>
Sub-total	340	16.7%	300	13.1%
<u>Other Industries</u>				
Agriculture, Forestry & Fishing	60	3.0%	60	2.6%
Mining	570	28.1%	900	39.3%
Electricity, Gas, Water & Waste Services	30	1.5%	40	1.7%
Information Media & Telecommunications	10	0.5%	10	0.4%
Administrative & Support Services	50	2.5%	70	3.1%
Education & Training	140	6.9%	140	6.1%
Other Services	60	3.0%	70	3.1%
Sub-total	920	45.3%	1,290	56.3%
Total	2,030	100.0%	2,290	100.0%

Source: REMPLAN with ABS Census of Population & Housing 2006 & 2011

Note: Figures Rounded. ABS 2016 Census data not published for employment as at July 2017

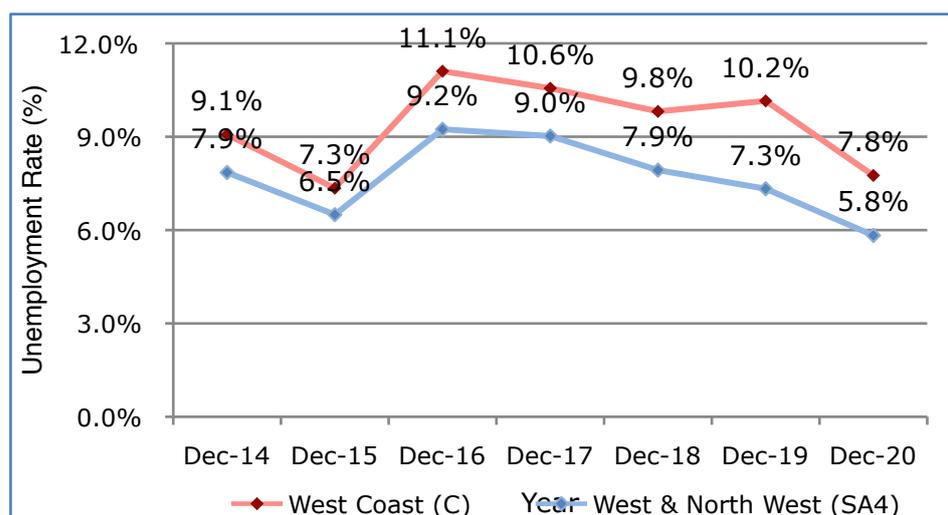
Table 7: Labour Force & Unemployment, West Coast (C), West & North West (SA4)

Category	2011 (December)	2016 (December)	Change 2011-2016 (No.)	Change 2011-2016 (%)
West Coast (C)				
Unemployed (No.)	170	180	10	5.9%
Labour Force (No.)	2,360	2,320	-40	-1.7%
Unemployment Rate (%)	7.2%	7.8%	-	-
West & North West (SA4)				
Unemployed (No.)	3,410	3,240	-170	-5.0%
Labour Force (No.)	52,520	55,660	3,140	6.0%
Unemployment Rate (%)	6.5%	5.8%	-	-

Source: Australian Government Department of Employment – Small Area Labour Markets (December Qtr 2016)

Note: Figures Rounded

Figure 8: Unemployment Rate, West Coast (C), West & North West (SA4)



Source: Australian Government Department of Employment, – Small Area Labour Markets (December Qtr 2016)

Table 8: Building Approvals by Sector, 2011 – 2017

Category	July 2011 - March 2017 (Total)		West Coast (C) Share of West & North West (SA4) (%)
	West Coast (C)	West & North West (SA4)	
<i>New Dwellings (No.)</i>			
Residential (No.)	28	2,494	1.1%
<i>Total Works (\$million)</i>			
Residential	\$8.0m	\$722.2m	1.1%
Commercial	\$2.0m	\$161.1m	1.2%
Industrial	\$3.9m	\$202.4m	1.9%
Short-Term Accommodation	\$1.8m	\$16.7m	10.7%

Source: Australian Bureau of Statistics – www.data.abs.gov.au

4.2.3. Key Industries

The economic context of the West Coast is informed to a large extent by the dual drivers of mining and tourism. These drivers are important considerations in determining the optimum land use zoning outcomes for the West Coast municipal area.

4.2.3.1. Mining

A broad range of minerals are mined in the West Coast including copper, gold, silver, zinc and nickel. Mining contributes significantly to the municipality in terms of the total number of jobs it generates, as well as flow-on effects to other industries such mining aligned trades/construction, and local retail and accommodation.

The following mines are currently operational in the West Coast:

- Rosebery Mine – This mine employs approximately 485 persons, with around 50% being contractors. Although it is understood that a new tailings dam has extended the mine’s lifespan, the current deposit is expected to be extinguished by 2023 (Rosebery Fact Sheet, MMG).
- Renison Bell Mine – It is understood this mine employs around 200 workers and has a lifespan of around ten years.
- Henty Gold Mine – It is understood this mine employs around 100 workers. The lifespan of the mine is unknown.

In addition to the mines noted above, the following mines are closed at the present time but potential exists for their re-opening:

- Mount Lyell Mine – Operated by CMT (Copper Mines Tasmania), this mine is located at Queenstown and has historically been the largest employer in the

town. The mine was shut down in 2014 and is currently in 'care-taker' mode. A small number of workers (understood to be around 25) have subsequently been undertaking maintenance activities on-site. The Tasmanian Government in April, 2017 committed \$9.5 million in funds for projects aimed at re-starting the mine. It is understood that if the mine were to re-start it would employ around 100 persons and have a lifespan of approximately 20 years.

- Avebury Mine – This mine opened in 2006 but subsequently ceased operations in 2009 due to weak nickel prices. The mine is in 'care-taker mode' and would potentially employ 120 workers if re-opened (The Mercury, Zeehan nickel mine dusts off cobwebs as optimism returns to West Coast town, 17/4/2014)

Potential exists for the establishment of a new tin mining operation in the Zeehan region by Stellar Resources and brought about by a recent rise in commodity prices. An estimated 150 to 200 jobs would be generated on-site (ABC News, Tasmanian mining sector looks up as rising commodity prices drive new projects, 18/1/2017). A new tin mine and processing facility by Ten Star Mining is also proposed near Zeehan and has recently been granted approval by the Tasmanian Environmental Protection Authority.

The viability of mining in the municipality is intrinsically linked to the fluctuations of global commodity prices and cannot be accurately predicted in the long-term. Mines in the region shut down or temper production when marginal revenue is at unsustainable levels due commodity price downturns. The closure of Avebury Mine in 2009 is a recent example. Equally, the region's mining activity has potential to increase when commodity prices are favorable.

However, it is apparent that both the Rosebery and Renison Bell mines are nearing the end of their life spans and will likely cease operations in approximately ten years if new deposits cannot be established. The future closure of these mines would significantly impact adversely on local employment and have significant adverse flow-on effects to the local West Coast economy, including take-up rates of residential, commercial and industrial land.

Approximately 44% of the local mining workforces are not permanent residents of the West Coast municipality, i.e. they are 'drive-in-drive-out workers' (ABS, Census of Population and Housing, 2011). The income earned by these non-residents workers in local mines and then spent elsewhere in Tasmania or Australia is an 'economic leakage' and reduces the total wealth of the West Coast region.

In this regard, it is important that the West Coast has a level of livability and service provision that encourages these workers to reside in the municipality permanently. The provision, quality and mix of local retail and commercial business are among aspects that contribute to the municipality's general livability and assists in attracting new residents.

4.2.3.2. Tourism

Tourism in West Coast Council is largely centered on Strahan and to a lesser extent on Queenstown. In addition, the small coastal settlements of Trial Harbour and Granville Harbour swell with holiday makers in the summer holiday period and Easter.

Strahan is the gateway to the world renowned Wild Rivers National Park and is the dominant location in the municipality for overnight accommodation ranging from higher-end hotels/motels (Strahan Village and Risby Cove), to budget motels,

caravan parks, and a vast array of bed & breakfast and Airbnb options.

The township has an idyllic water-front setting, with majority of its retail and accommodation components overlooking the working harbour. The main tourist draw card is the Gordon River cruises, which are offered by several companies and operate daily, departing from the harbour. The West Coast Wilderness Railway, which runs between Queenstown and Strahan is another significant tourist draw card, as well as a wildlife cruise to Bonnet Island.

Queenstown also receives significant visitation due to its quirky setting and mining history, although visitors tend to be 'passers-by' due to a relatively limited provision of overnight accommodation options. In addition to the West Coast Wilderness Railway, the town's Gallery Museum is of specific interest to visitors.

In terms of tourist visitation it is understood that the West Coast has lost market share in the last 15 years to the balance of the Tasmania. At present, the West Coast is not promoted as part of the three-day Tasmania motor holiday, which typically comprises Hobart, the East Coast, Launceston and Cradle Mountain.

Tourism is seasonal, but important in terms of providing local employment opportunities in the retail and accommodation sectors, particularly for the municipality's younger unskilled residents. Visitor estimates in recent years for the West Coast and other prominent tourist locations are shown in Table 9.

The municipality's annual average growth in visitors from 2013 to 2016 was 7.6% and this is higher than that recorded for Tasmania as a whole at 6.2%. However, the West Coast attracts a substantially smaller increase in visitors than both Cradle Mountain (11.8% per annum) and the Tasmania's East Coast (10.1% per annum). The total number of visitors to the area in 2016 was approximately 185,000 visitors and this is approximately one-half that of the 353,000 visitors to the East Coast.

Table 9: West Coast Council Visitor Estimates, 2013-2016

Region	2013	2014	2015	2016	Average Annual Growth 2013-2016
West Coast (C)					
Queenstown	105,280	112,050	121,260	134,640	8.5%
Strahan	114,300	129,650	133,320	135,400	5.8%
Zeehan	73,010	75,830	86,700	80,990	3.5%
Rosebery	69,950	72,530	74,410	75,900	2.8%
Tullah	61,260	63,040	64,650	72,360	5.7%
Balance	34,730	31,150	39,080	37,650	2.7%
West Coast (C) Total	148,290	162,890	173,260	184,800	7.6%
Other Locations					
Cradle Mountain	154,840	180,190	195,030	216,430	11.8%
Launceston (City)	431,830	422,310	481,520	539,250	7.7%
East Coast (Total)	264,300	284,330	321,870	352,680	10.1%
Hobart (City)	736,550	783,790	857,210	894,280	6.7%
Total Tasmania	1,033,590	1,068,050	1,153,300	1,236,380	6.2%

Source: Tourism Tasmania, *Tasmania Visitors Survey*

Note: Includes visitors aged 14 years and over

4.3. What are the strengths, weaknesses, opportunities and threats within the local strategic planning context?

In considering the best strategic land use planning options for the future of the West Coast, it is important to have regard to the overarching strengths, weaknesses, opportunities and threats for the region.

4.3.1. Strengths

Key strengths for the municipality are as follows:

- Established mining region with potential for new investment in the sector (opening of new Stellar Resource mine, re-opening of Mt Lyell Mine)
- Established tourism industry centered upon Strahan with growth potential
- Established aquaculture industry at Strahan which has observed significant investment in recent years (\$10 million Aquaculture Hub at Smiths Cove)
- Region has a unique history and natural setting – both of which can be leverage by the tourism sector

4.3.2. Weaknesses

The weaknesses that need to be addressed are:

- Small population in long-term trend decline (1988 Pop. = 9,310; 2016 Pop.= 4,430 approx.)
- Lack of a critical mass of population in each town to support and attract major businesses
- Minimal local investment in retail, commercial or industrial sectors
- Viability of local mining operations is exposed to fluctuations of volatile commodity prices.
- Significant 'drive in-drive out' workforce in the mining sector is a 'income leakage' from
- 'Tired' town centres with a high vacancy level across most towns
- Provision of 'local service' industrial land appears limited for the Council as a whole
- Topography constrains developable land supply in some towns

4.3.3. Opportunities

There are various opportunities for the municipality. These include:

- Potential to increased local investment in commercial, retail and industrial sectors
- Potential for local retail sector to leverage from future tourism opportunities
- Potential for Queenstown, Zeehan and Rosebery to develop a greater tourist offering centered upon each towns unique history and environs
- Potential to attract new residents based on the regions rural lifestyle and wilderness values.

4.3.4. Threats

The threats that needs to be addressed are:

- Continued decline in population leading to lack of investment and loss of services
The regional economy's exposure to the mining sector
- Continued ageing of the workforce

4.4. Preliminary land supply considerations

Based on the strengths, weaknesses, opportunities and threats analysis for the municipality, a preliminary assessment of the land supply considerations for residential, retail/ commercial and industrial land has been undertaken.

For Queenstown, the current supply of residential land appears to be sufficient (although constrained by the topography). The current supply of retail/ commercial land also appears to be sufficient. The industrial supply of land appears to be limited. On this basis, opportunities to secure land suitable to accommodate local service industrial activities (ie trades related, engineering, mining sector service, warehousing and storage) need to be explored.

For Strahan, the current supply of residential land appears to be sufficient. The retail/ commercial supply of land appears to be limited. There is potential that more land may be required for future needs. The current supply of 'general industrial' land on Ocean beach Road is heavily vegetated and would require clearing. There is potential to explore other locations that may better accommodate 'local service' industrial uses.

For Zeehan, the current residential supply seems to be sufficient. From a retail/ commercial perspective, the current supply of 'local business' zoned land appears to be sufficient. There is however, the potential for stronger strategic guidance pertaining to this land being the 'focal point' of retail commercial activity. The current supply of 'light industrial' and 'general industrial' zoned land appears to be sufficient.

For Rosebery, the current supply of residential land appears to be sufficient, although this is constrained by the topography. From a retail/ commercial perspective, the current supply of 'local business' zoned land appears to be sufficient. There is however, no supply of industrial land (other than that associated with the Rosebery mine). On this basis, there is potential to explore locations that could accommodate local service industry however, possibilities may be constrained because of the topography.

For Tullah, the current supply of residential land is considered sufficient. There is however, the capacity to accommodate substantial future residential growth in Tullah in the future. From a retail/ commercial perspective, there is no 'local business' zoned land located in the town. Both Farrell and Peters Streets activity nodes are zoned 'general residential'. An appropriate supply of land is available in both locations for retail/ commercial activities. On the industrial front, there is no supply of industrial zoned land although industrial activity is located on land directly south of the recreation reserve. The demand may not exist to warrant a supply of industrial land in this location.

4.5. Having regard to the West Coast Community Plan 2025 and the existing broader State and Regional Planning Policies, what are the key considerations for the future land use planning within the West Coast?

With a focus on residential, retail/ commercial and industrial land in the context of the objectives of the *West Coast Community Plan 2025*, the key implications are highlighted below.

4.5.1. Residential zoning implications

West Coast has a generous supply of land that is appropriate for residential development across all towns and settlements. This supply is anticipated to comfortably accommodate future demand for residential land, which is expected to be low and generally in-line with historic trends.

As discussed previously, in recent years Strahan observed a significantly higher rate of new dwelling construction than the balance of the municipality due to the town's tourism and holiday-maker context, although this has not materialised in significant uptake of vacant lots.

It would be expected that if a significant long-term uplift in demand for development of vacant lots was to occur in the future on the West Coast, Strahan would be a likely location. This could potentially materialise if Strahan's tourism profile and market share were to increase beyond existing levels, due to holidaymaker accommodation stock being accommodated on residential land (and the rise of Airbnb has intensified this effect).

If the uptake of vacant lots was to increase to (say) four lots annually – a significant increase on the rate of uptake from 2011-15 based on surveys of aerial imagery (1 lot per year) – the existing supply would still be sufficient to accommodate 28 years of development.

For other towns and settlements in the municipality, mining activity and expectations about future mining activity would be the dominant driver of residential demand, as it has been historically. In particular, Queenstown, Zeehan and Tullah have a generous supply of vacant lots and would comfortably accommodate a significant uptake in residential land. Although Rosebery's supply of vacant residential land is limited, Tullah and Zeehan are well located and have sufficient supply to accommodate demand that may be directed from Rosebery.

Tullah's proximity to Burnie relative to the balance of the West Coast municipality means that Tullah could potentially be a future location for residential growth. If this was to occur, the town would have to significantly improve its retail and service offer beyond existing levels. In any case, if significant demand did materialise the supply of General Residential Zone land, plus the vacant residential land in the Rural Resource Zone, would be sufficient.

The small settlements of Trial Harbour and Granville Harbour are primarily holiday destinations and are unlikely to experience any significant uptake in residential land.

In summary, the currently supply of vacant land appropriate for residential development is sufficient relative to likely future demand on the West Coast. Thus, the implications for future zoning of residential land relate to the rezoning of the Rural Resource land in townships/settlements, which is used for residential purposes, to an appropriate residential zone.

For Zeehan, this may be a zone that is consistent with the Rural Resource Zone that allows for low density residential to maintain a 'rural residential' character. For Tullah's Rural Resource Zone where residential zoning may be more appropriate, a 'holding zone' may be permitted to keep development patterns from being fragmented until such a time when supply of the Rural Resource land for residential purposes is warranted. For Granville Harbour and Trial Harbour, consolidating residential land in Rural Resource and Low Density Residential Zone into one consolidated residential zone may be appropriate.

The implications for future zoning in relation to each township/settlement are

summarised in Table 10.

Table 10: Implications for Future Zoning of Residential Land

Town	Comment/Implication
Queenstown	<ul style="list-style-type: none"> Sufficient supply in General Residential Zone
Strahan	<ul style="list-style-type: none"> Sufficient supply in General Residential Zone May consider long-term future direction of residential growth
Zeehan	<ul style="list-style-type: none"> Sufficient supply in General Residential Zone Investigate zoning residential supply in the Rural Resource zone to an appropriate zone which is consistent with the land's low density residential character
Rosebery	<ul style="list-style-type: none"> Sufficient supply in General Residential Zone
Tullah	<ul style="list-style-type: none"> Sufficient supply in General Residential Zone Rural Resource Zone supply to be identified for future growth and zoned accordingly The use of a 'holding zone' is an outcome, which could be investigated with regard to the residential land supply in the Rural Resource Zone.
Trail Harbour & Granville Harbour	<ul style="list-style-type: none"> Sufficient supply of land appropriate for residential development in both the Low Density Residential Zone and Rural Resource Zone Preference to consolidate residential land under one zone

Source: Essential Economics

4.5.2. Retail/ commercial zoning implications

The implications for future zoning of retail and commercial land in each of the West Coast townships of Queenstown, Strahan, Zeehan, Rosebery and Tullah have been assessed.

For Queenstown, the existing quantum of land in the General Business zone is sufficient to accommodate a future uplift in retail/commercial development. Visitor accommodation should be encouraged (either new development or in existing heritage buildings) to attract higher levels of overnight visitation, associated on-street activity and higher levels of retail spending.

In Strahan, the existing quantum of land in the Local Business zone is sufficient to accommodate a future uplift in retail/commercial development with around 1,300m² of vacant land available between the existing IGA Express and BP Service Station. A further 0.51ha of vacant land abuts Reid Street, opposite the IGA Express. Combined, these parcels could accommodate 2,500m² of ground floor retail/commercial floor space

- A retail/commercial zone (say Local Business) may be appropriate for Innes Street retail node, which currently contains a takeaway café and a dry cleaner.
- For Zeehan, the existing amount of Local Business Zone land is sufficient to meet the town's retail role. The possibility may exist for zoning the General Residential land accommodating the IGA Express supermarket and Hemskirk Motel Hotel to Local Business. It may be possible for the small area of General Residential land that accommodates Hotel Cecil, GBE offices and United Service Station to be zoned Local Business as a secondary retail node.
- It is important that the planning framework should minimise the continuation a fragmented retail and commercial land use patterns along Main Street by directing retail/commercial development to appropriately zoned nodes or focal points, rather than allowing dispersed retail activities.

For Rosebery, the prevailing quantum of land in the Local Business zone is sufficient to accommodate likely future retail/commercial development and activity. The possibility may develop for an extension to the Local Business zoned precinct to include land abutting Agnes Street (to the south) between Arthur Street and Primrose Street. This land contains a number of shop fronts and effectively forms part of Rosebery's town centre.

In Tullah, currently, no land is specifically zoned for business use. It would be appropriate for the Farrell Street retail/commercial node to be zoned for business use. It may also be warranted for a business or mixed-use zone to be applied to General Residential land abutting the Murchison Highway between Ardyn Street and Elliot Street, which includes the Tullah Tavern.

4.5.3. Industrial zoning implications

In view of West Coast's historic, long-term trend for a decline in population numbers, the municipality's narrow industry base and limited employment opportunities, it is critically important that a sufficient supply of industrial land (in relation to both location and type) is available to accommodate economic growth and to generate employment. Other important aspects relating to industrial land planning and development include supporting consolidated land use patterns and minimising the potential for land use conflict.

Although the municipality has experienced low levels of industry-related building and investment, as well as a low level in the uptake of vacant lots zoned for industrial use in recent years, it is apparent that the supply of industrial land is limited, particularly for Queenstown, Strahan and to a lesser extent Rosebery and Tullah, owing to the fact that the West Coast covers an extensive area. An increase in supply would not be expected to undermine the financial viability of existing industrial precincts.

Accordingly, it would be prudent for Council to secure additional industrial zoned land for local service use in the Shire's southern reaches (Queenstown and Strahan) and to a lesser extent in Rosebery and Tullah. It is of particular importance that a new industrial precinct be established in Queenstown due to the town's important role as the major population and service hub for West Coast, and having regard for the town's existing industrial land where new investment and development is limited by a range of factors.

It is understood the potential for accommodating an industrial precinct at the Queenstown Airport has been discussed by Council for some time. In 2010, a report titled 'Strategic Directions - West Coast Impact and Opportunity Study' (Regional

Redevelopment Company) recommended the Airport site as a future industrial precinct adjacent to Council-owned land. It appears that the site would be suitable for local service industrial development, having regard for the land area involved, and the site's relatively flat and unencumbered topography, with access to the Lyell Highway.

An area of land (6.6ha) in the General Industrial zone is available at Strahan, adjacent to Ocean Beach Road (to the west of the township). However, the majority of this land is heavily vegetated (thus involving higher development costs) and is not subdivided. As a result, the availability of potential industrial land servicing the township, which has lower development costs should be explored. Alternative sites may include land at the Strahan Airport or an area of Rural Resource Zoned land located directly west of the Manuka River and north of Harvey Street.

Although Zeehan has a reasonable supply of vacant General Industrial Zoned (15ha), the town's Light Industrial precinct only has 0.3ha supply (3 lots). While the take-up of vacant lots in this precinct has been low, further supply is warranted due to the lack of industrial land in the nearby Rosebery and Tullah. Vacant land in the Rural Resource Zone is located directly south the existing precinct, between Shaw Street and Dodd Street, and should be investigated as a possible extension of the Light Industrial Zone.

Neither Rosebery nor Tullah has land zoned for General or Light industrial use. While the possibility of establishing a small industrial precinct at one of these locations should be investigated, it is acknowledged an appropriate site may not exist in either township. In this case, demand for industrial land that would otherwise locate in Rosebery and Tullah would be accommodated by Light Industrial and General Industrial precincts at Zeehan due to this town's relative proximity to the other two townships.

The implications for future zoning of industrial in relation to each township/settlement are summarised in Table 11 overleaf.

Table 11: Implications for Future Zoning of Industrial Land

Town	Comment/Implication
Queenstown	<ul style="list-style-type: none"> No supply exists in the current General Industrial zoned land. Investigate the potential for an industrial precinct at the Queenstown Airport (or another appropriate site) to accommodate local service industry. The establishment of new consolidated industrial precinct would take priority over fragmented industrial land development responses (e.g. the relocating of Gasperic Contracting to the Queenstown Hockey Oval).
Strahan	<ul style="list-style-type: none"> Existing supply of General Industrial zoned land is uncleared and has no occupants (apart from the Waste Transfer Station). Investigate the potential for an industrial precinct at a site with less development constraints (in terms if ease of development and cost). The Strahan Airport and Vacant Rural Resource (shown in Figure 5.6) are both alternatives for consideration.
Zeehan	<ul style="list-style-type: none"> Sufficient supply in General Industrial Zone. Supply of vacant land in the Light Industrial Zone is limited. Investigate the potential for this precinct to be extended. Note that Zeehan will continue to accommodate demand (although limited) from Rosebery and Tullah if industrial land cannot be secured at either of these two locations into the future.
Rosebery	<ul style="list-style-type: none"> No land zoned for industrial use. Consider the potential for local service industrial precinct to be located at the township (acknowledging that the township has only a limited supply of developable land).
Tullah	<ul style="list-style-type: none"> No land zoned for industrial use, although an industrial land use is located in the Rural Resource Zone south of Hean Street. Consider the potential for a local service industrial precinct to be located south of Hean Street and adjacent to the existing industrial use.

Source: Essential Economics

From an industrial perspective, acknowledging proximity to population centers, topography and accessibility the Queenstown and Strahan airport sites are worthy of some consideration. When assessing the viability of industrial land and associated opportunities that may arise these airport sites are important given the associated opportunities and even buffer constraints that are attached to airports as a land use option.

Refer to Figure 9 and Figure 10 below.

Figure 9: Queenstown Airport - Potential Future Local Service Industrial Site



Produced by Essential Economics with MapInfo and BingMaps

Figure 10: Strahan Airport - Potential Future Local Service Industrial Site



Produced by Essential Economics with MapInfo and BingMaps

4.5.4. Public park and recreational zoning implications

As with every town, public park and recreational zoned land is an important amenity and critical in maintaining liveable, healthy communities. Whilst an extensive survey and analysis of the existing public park and recreational zoned land in each of the towns was not undertaken as part of the scope of this project; from a strategic planning perspective, it is recommended that existing public park and recreational zoned land and associated uses are retained to ensure each community benefits from an acceptable level of amenity.

4.5.5. Rural and agricultural zoning implications

There are various parcels of Rural Resource zoned land in and around the different townships. Some are larger consolidated parcels, which depending on their agricultural rating should remain zoned for rural/ agricultural purposes. There also exist other small parcels of Rural Resource zoned land, which are scattered amongst other zones. It was not part of our brief to analyse and assess the viability of Rural Resource zoned land for rural and agricultural purposes. However, there is the opportunity as part of Council's implementation of the State Government's proposed changes to state planning policy framework and zone conversions and translations to amend some of the parcels of land, which may be anomalies from the previous scheme particularly where it is clear that land use conflicts may arise in the future.

5. CONCLUSIONS

In determining the strategic land use planning direction for the future of the West Coast there are three key questions that need to be addressed within the planning context for the municipality. These are:

- What is the current geographic and economics planning context for the West Coast?
- What are the strengths, weaknesses, opportunities and threats within the local strategic planning context?
- Having regard to the *West Coast Community Plan 2025* and the existing broader State and Regional Planning Policies, what are the key considerations for the future land use planning within the West Coast?

The West Coast is a unique area within the State of Tasmania.

It is concluded that there are a number of strengths and opportunities for the municipality of the West Coast despite current threats and opportunities that have emerged from the analysis and assessment of the local context associated with this strategic plan.

By way of summary, the key findings taking into account input from planning, economic and transport disciplines are:

- The West Coast is among the most isolated municipalities in Tasmania, located around a three-hour drive from Hobart and over two hours from Launceston.
- Geographically, the West Coast encompasses a large predominantly wilderness area of approximately 9,680 square kilometers. It has a rich mining history and various opportunities in the tourism sector.
- The West Coast has a small population of some 4,380 persons in 2017 and the total number has been in long-term decline for many years. Tasmania's official population projections *Tasmania and Its Local Government Areas (2014)* forecast a continuation in the decline in population.
- Actions must be taken to address the West Coast's trend of population decline. A stabilisation in population, or preferably some growth, is an outcome that should be sought to be achieved in the West Coast. Accordingly, population increase must be considered in terms of the West Coast Council's future land development context and strategic planning framework.
- The economic context of the West Coast is informed to a large extent by the dual drivers of mining and tourism. The viability of mining in the region is significantly informed by fluctuations in commodity prices.
- The West Coast has very low levels of residential, commercial and industrial development activity relative to the West & North West (SA4) region. Low levels of demand for residential, commercial and industrial land is a product of the municipality's low (declining) population and narrow industry and employment base.

- The West Coast accommodates some 10,010m² of shop front floor space. In the order of 38% of the municipality's retail floor space is located in Queenstown. A high level of shop front vacancy was observed for the municipality as a whole (18%) and in all centers apart from Strahan.
- Access to the area relies on the State Road Network, notably Lyell Highway (to Derwent Valley/Hobart) and Murchison Highway (to North West/Burnie and Launceston). Recent and on-going improvements to the State Road Network have improved access to the region.
- Strahan Airport provides for charter flight services only. Queenstown Airport is unregistered with use/landings subject to Council permission. Both airport sites have good road access, with opportunities existing for possible expansion.

Key implications for zoning in each major townships in the municipality are as follows:

Queenstown

- A sufficient supply exists in the General Residential Zone and General Business Zone.
- Investigate the potential for an industrial precinct at the Queenstown Airport (or another appropriate site) to accommodate local service industry, as the current General Industrial Zoned land is substantially developed.

Strahan

- Sufficient supply exists in General Residential Zone, although the future direction of residential growth may need to be considered in the long-term or when warranted by market demand.
- The existing quantum of land in the Local Business zone is sufficient. Parcels in the area of the IGA express and abutting Reid Street could accommodate the future development of some 2,500m² of ground floor retail/commercial floor space.
- Existing supply of General Industrial zoned land is unclear and has no occupants (apart from the Waste Transfer Station). Investigate the potential for an industrial precinct at a site with less development constraints (in terms if ease of development and cost).

Zeehan

- Sufficient supply exists in the General Residential Zone, General Industrial Zone and Local Business Zone.
- Investigate potential for low density residential land supply on land currently zoned Rural Resource
- The possibility may exist for zoning the General Residential land accommodating the IGA Express supermarket and Hemskirk Motor Hotel to Local Business, as well as the small area of General Residential land that accommodates Hotel Cecil, GBE offices and United Service Station.

- The supply of vacant land in the Light Industrial Zone is limited and the potential for this precinct to be extended should be investigated.

Rosebery

- Sufficient supply exists in the General Residential Zone and Local Business Zone.
- The possibility may develop for an extension to the Local Business zoned precinct to include land abutting Agnes Street (to the south) between Arthur Street and Primrose Street, which effectively already forms part of Rosebery's town centre.
- No land zoned for industrial use. Consider the potential for a local service industrial precinct to be located in the township, acknowledging that the township has only a limited supply of developable land.

Tullah

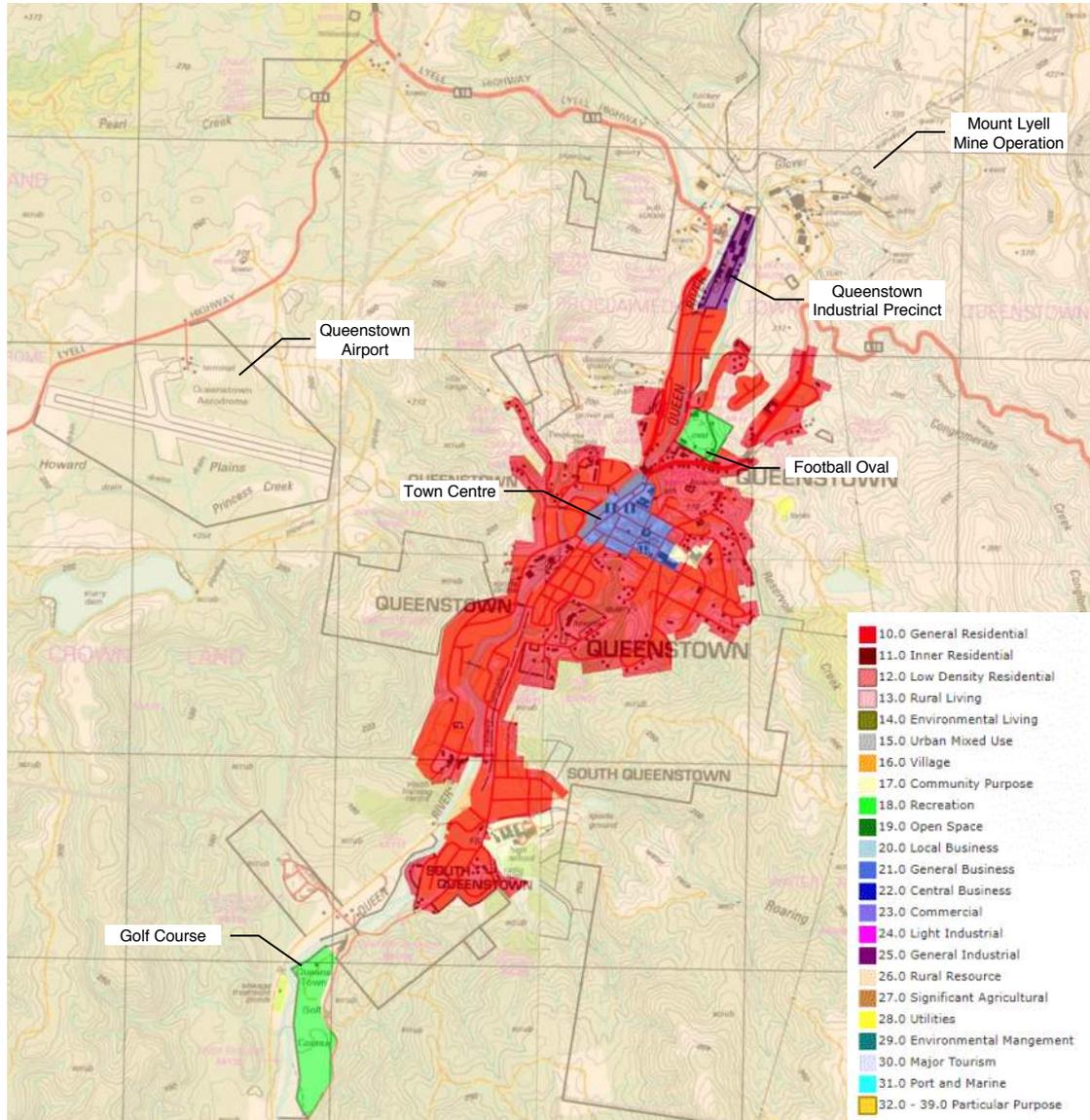
- Sufficient supply exists in General Residential Zone. These areas are supported by an established street network.
- Identify existing Rural Resource Zone land as future long-term residential growth area and zone accordingly (the use of a 'holding zone' may be warranted).
- It would be appropriate for the Farrell Street retail/commercial node to be zoned for business use. Rezoning of the General Residential land abutting the Murchison Highway between Ardyn Street and Elliot to a business or mixed use may be warranted.
- No land zoned for industrial use. Consider the potential for a local service industrial precinct to be located south of Hean Street and adjacent to the existing industrial use.

Granville Harbour and Trial Harbour

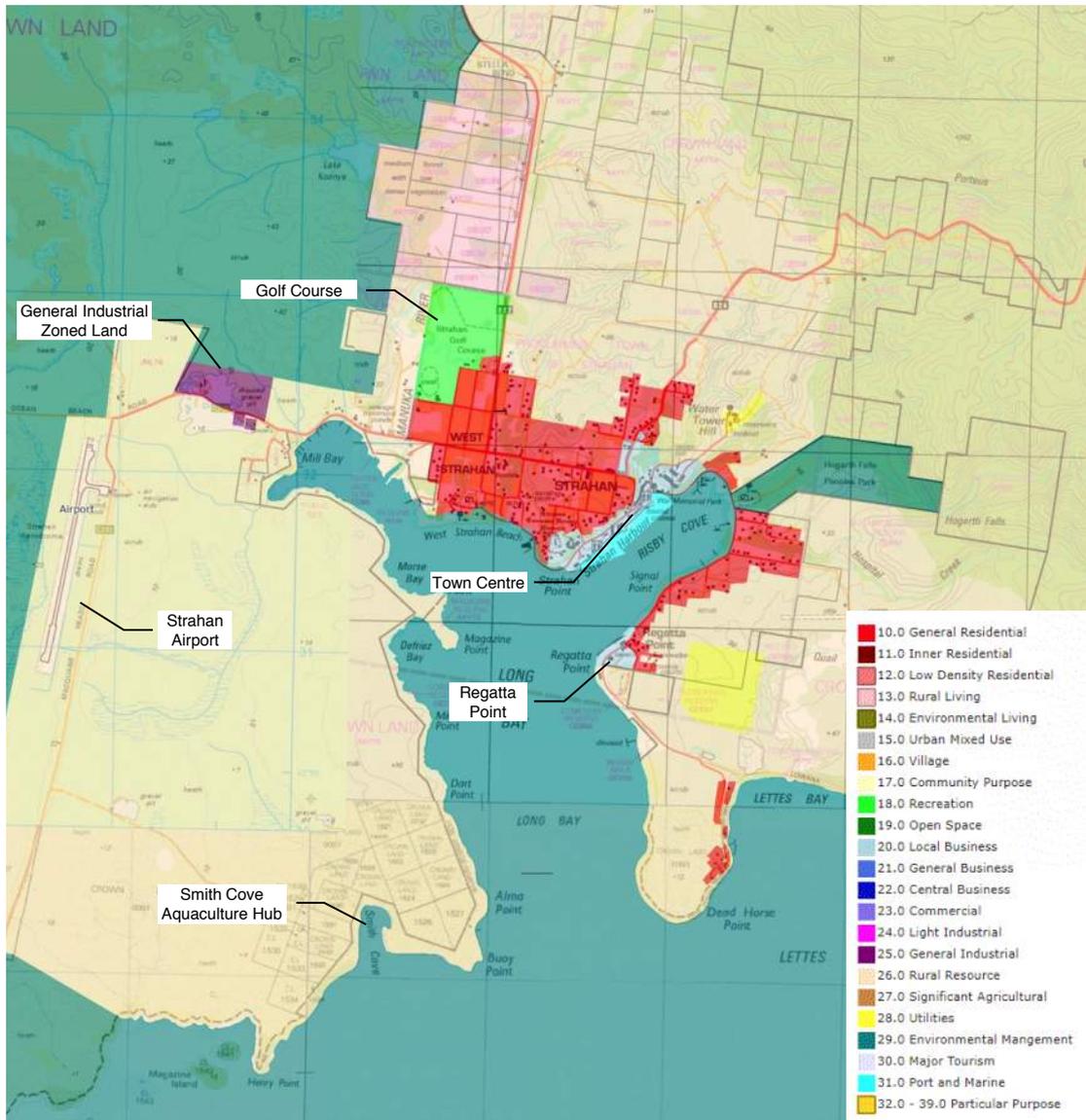
- Sufficient supply of land appropriate for residential development in both the Low Density Residential Zone and Rural Resource Zone.
- Access is limited to lower order/standard unsealed roads.
- Preference to consolidate residential land under one zone.

APPENDIX 1: Maps

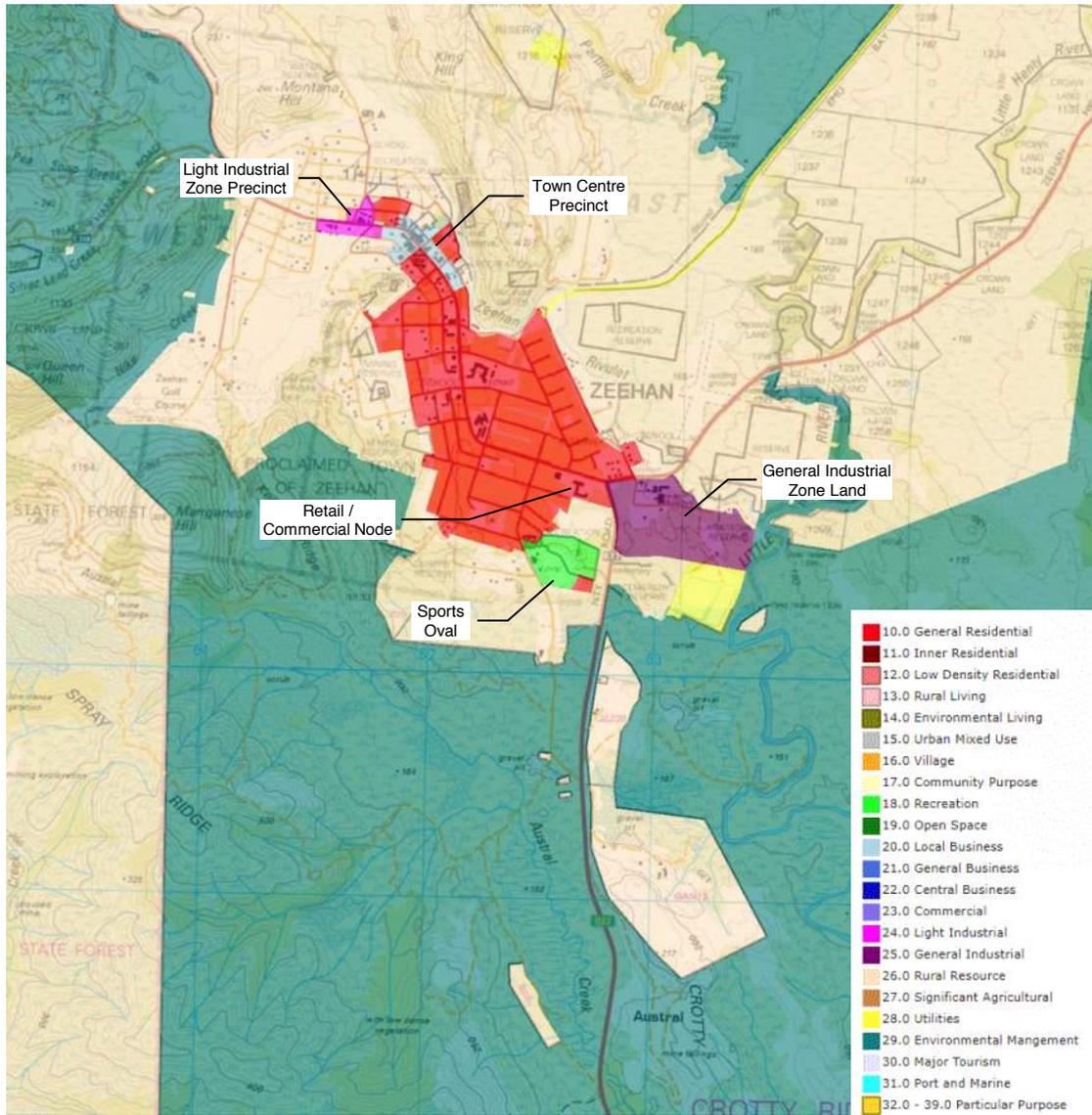
Tasmanian Interim Planning Scheme Zoning - Queenstown



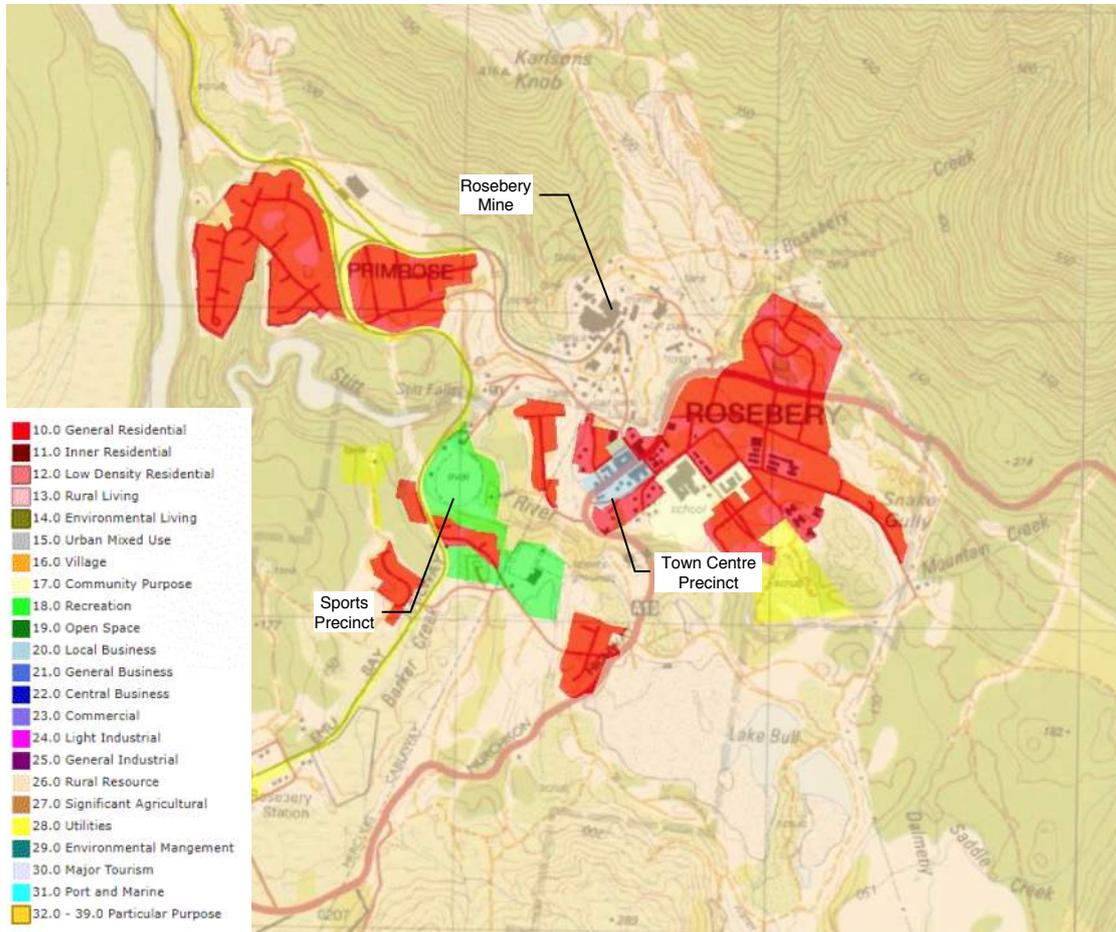
Tasmanian Interim Planning Scheme Zoning - Strahan



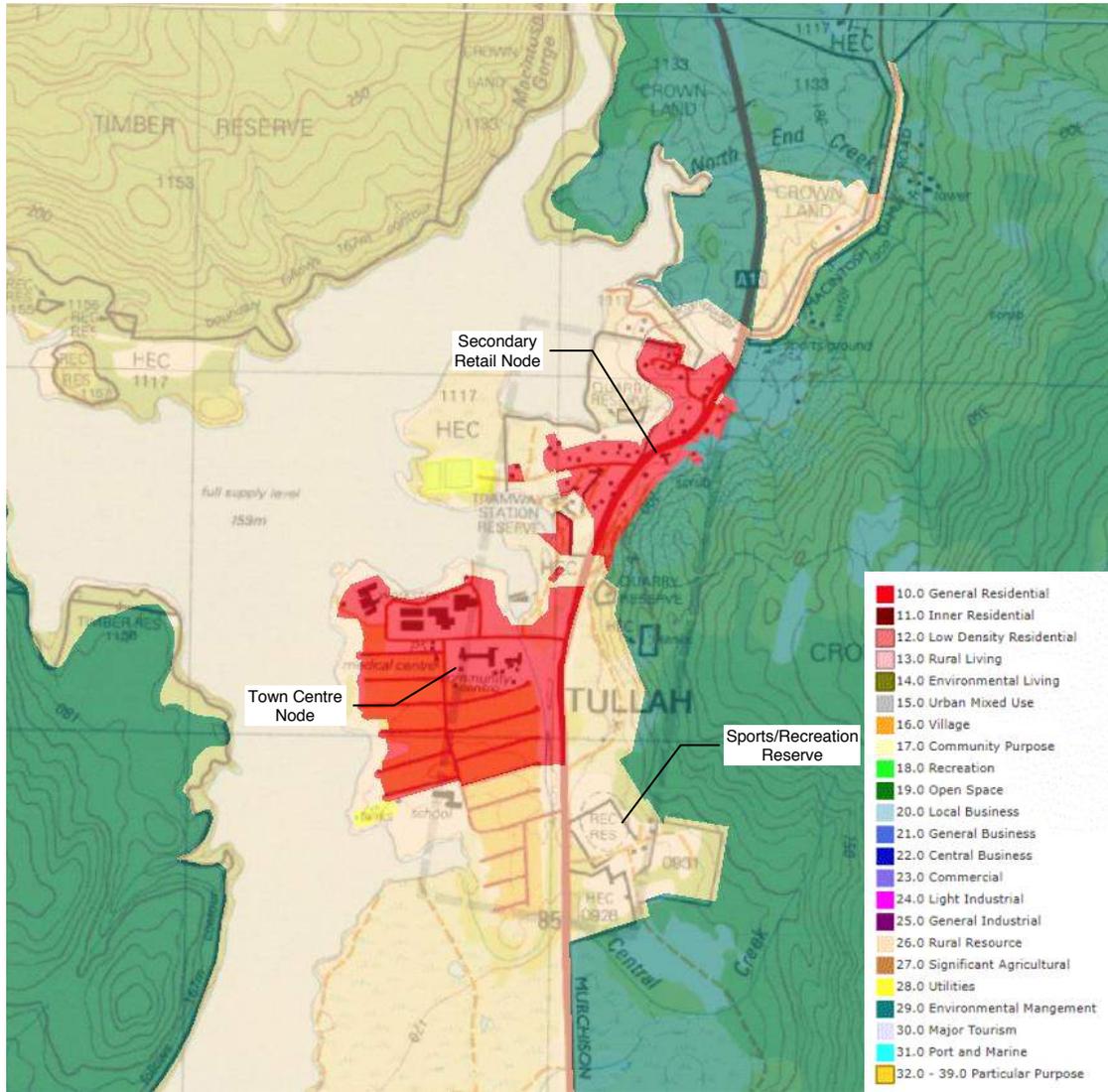
Tasmanian Interim Planning Scheme Zoning - Zeehan



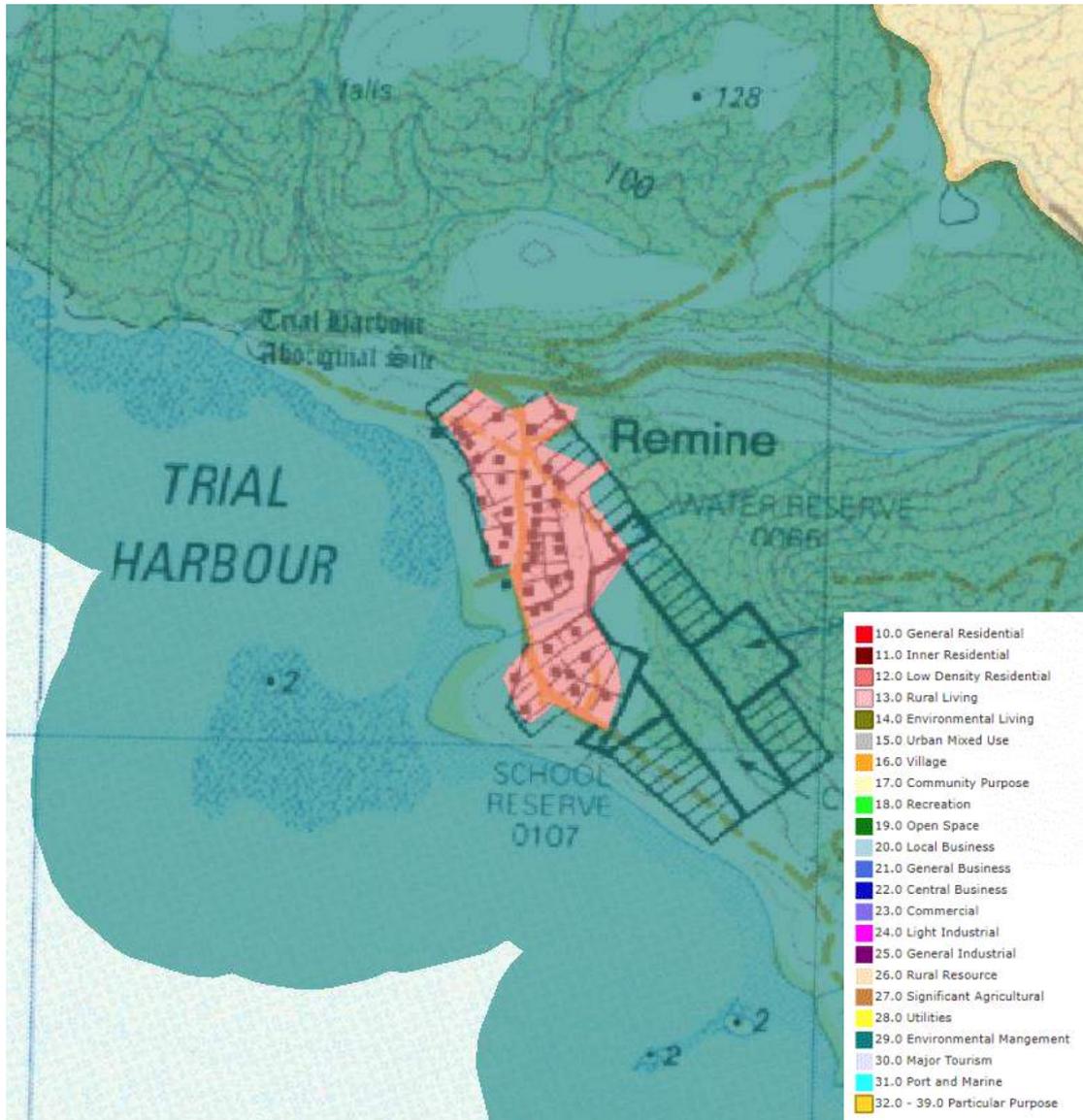
Tasmanian Interim Planning Scheme Zoning - Rosebery



Tasmanian Interim Planning Scheme Zoning - Tullah



Tasmanian Interim Planning Scheme Zoning – Trial Harbour



Tasmanian Interim Planning Scheme Zoning – Granville Harbour

