

Regional Strengths and Infrastructure Gaps

Regional Analysis:
Tasmania



Table of contents

6.6 Tasmania	441
6.6.1 Tasmania	442

References	455
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6.6 Tasmania



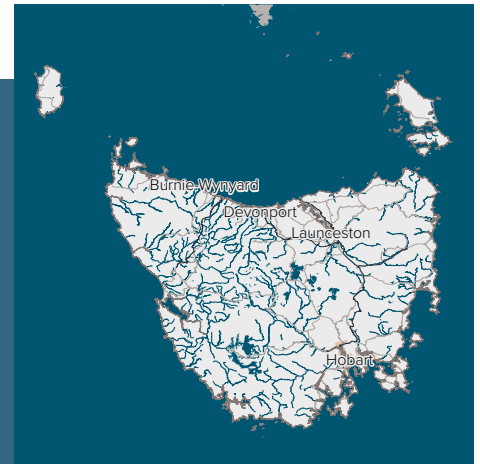
Hobart, Tasmania

6.6.1 Tasmania

Tasmania represents 0.9% of the nation's total land area and 2.1% of the nation's population^{1,2}. The state, which includes many offshore islands is home to a growing population who benefit from a high quality of life, significant rainfall, quality further education offerings and access to exceptional natural environments which attract a global audience. Tasmania has seen significant growth in population and visitation over recent decades, as well as economic diversification with the growth of exports, manufacturing and healthcare, alongside the emergence of digital and creative industries. However, this growth has increased demand for housing and with this created growing challenges of housing affordability.

Connectivity across Tasmania and with the mainland will be vital for the continued development of industries of all sectors. Tasmania is well positioned to capitalise on opportunities for increasing renewable energy production alongside the development of circular economy opportunities. Maintaining and enhancing liveability through increasing access and quality of services to enhance quality of life is a high priority supported by improving healthcare, education and digital connectivity.

Infrastructure Australia acknowledges the limitations of capturing the breadth and diversity of issues across a single geographic area for the entire state of Tasmania.



Mt Wellington Lookout, Hobart, Tasmania

Strengths

Key existing assets

Economic	Gateway ports	Airports and seaports are vital to the accessibility and economy of Tasmania and include the main freight ports of Burnie, Bell Bay and Devonport, and Port of Hobart (which also services Antarctic departures and arrivals), as well as Launceston and Hobart airports.
	Energy infrastructure	The Basslink Interconnector improves energy security on the mainland and provides economic value for Tasmania alongside significant hydropower and wind assets.
	Water infrastructure	Tasmania has nearly 13% of Australia's total water resource, with large-scale irrigation systems to ensure the competitiveness of water-intensive industries. ³
	Tourism brand	Tasmania is internationally recognised for its natural environments, high-quality produce and unique lifestyle offering.
Natural	Natural environments	World Heritage listed sites and conservation areas cover much of Tasmania.
	Natural resources	High-grade mineral deposits include copper, silver, gold, tin, lead, zinc, magnetite and ultra-high purity silica flour.
	Climate and topography	A mild seasonal climate, reliable rainfall and fertile soils enable the production of premium food, beverages and other products through the valuable agriculture, forestry and fishing sectors.
Social	Education and research institutions	The University of Tasmania provides tertiary education, research and innovation opportunities for the state, including the Institute for Marine and Antarctic Studies. CSIRO and the Menzies Centre also have significant research institutions in Hobart.

Key regional growth industries

<p>Energy</p> <p>The sector is undergoing growth and expansion, driven by hydropower and wind generation activities. Tasmania's existing reliable renewable energy sector presents significant opportunities to establish competitive green hydrogen production.⁴ Tasmania has reached the milestone of 100% renewable energy generation, with a target to double the installed renewable generation capacity by 2040.⁵ The vision to produce more renewable energy than needed creates further opportunities for export back to mainland Australia via the existing Basslink Interconnector and new interconnection and supporting on-island transmission upgrades (Project Marinus).⁶</p>	<p>Tourism</p> <p>Tasmania's strong tourism industry was able to attract over 1.3 million visitors and \$2.54 billion in visitor spending during 2019 pre COVID-19 pandemic.⁷ Interstate visitation remained strong despite border restrictions, with every month of 2021 recording higher than average spend per domestic visitor compared to the same months in 2019⁸. The state has a reputation for world-class national parks, reserve land and First Nations land,⁹ with almost 25% of the state classified as World Heritage.¹⁰</p>
<p>Knowledge sector</p> <p>The state continues to build research and innovation capability, and grow international education exports, which was valued at \$376 million in 2017.¹¹ Building a diverse science research community alongside the state's proximity to Antarctica and the Southern Ocean have resulted in unique expertise in a number of scientific areas.^{12,13}</p>	<p>Healthcare and social assistance</p> <p>Healthcare and social assistance is the largest employing industry in Tasmania¹⁴, with employment in the sector projected to grow by 9% from 2020-25.¹⁵ The aged services sector is highly engaged in workforce training.¹⁶</p>

Infrastructure gaps



Sector: Social infrastructure

Sub-sector: Housing

Infrastructure gap: Availability, diversity and affordability of housing

The COVID-19 pandemic has seen new challenges for the supply of housing, especially for lower income tenants in the private rental market.¹⁷ However, the pandemic is not the only driver impacting housing in Tasmania, with market shifts also creating strong demand for short stay accommodation. The complexity of these challenges including increasing rental prices, increased property prices, competition between applicants for tenancies, homelessness and social housing supply and demand were explored in the *Inquiry into Housing Affordability* by the Parliament of Tasmania in 2020.¹⁸ A new Tasmanian Housing strategy is currently being developed.

Housing unaffordability is an issue across Tasmania. The 2021 Rental Affordability Index identifies that Greater Hobart is the least affordable metropolitan area in Australia and the only capital city where the average rental household would be considered in rental stress.¹⁹ Further exacerbating the issue is a high proportion of low-income households, wage stagnation and a high degree of reliance on income support benefits, whilst housing prices continue to rise.²⁰ Key priorities identified in *Tasmania's Affordable Housing Action Plan 2019-2023* include new supply, improved access and responsive services.²¹

Key facts:

1 in 3

households renting were living in rental stress in 2019.²²



75%

of Tasmanians accessing homelessness services do so as a result of difficulties related to accessing accommodation.²³



The Tasmanian Government has invested in an increase of social housing stock by

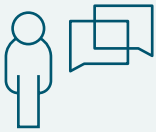
3,500

by 2027, including 1,500 by the end of June 2023.²⁴



Impact:

- Low availability of affordable housing stock can bring about difficulties in attracting and retaining skilled workers.²⁵
- Accompanied by low-skilled wage stagnation, housing unaffordability may encourage further social stratification as quality housing is afforded by fewer residents.²⁶
- A lack of affordable housing availability can bring about housing insecurity, which can result in detrimental health and wellbeing outcomes as well as reduced community engagement.²⁷



Consultation feedback:

Workshop participants prioritised a need to deliver improved access to affordable and social housing across Tasmania. This was noted to be an issue both in growing urban areas, such as Hobart and Launceston, and in smaller communities throughout the state. Collectively, the group expressed concerns that this issue would continue to worsen for the region in the face of a growing population and rising cost of living, noting that Tasmania's quality of life – a key strength – may be jeopardised.

Stakeholders also noted the importance of quality housing in attracting skilled workers, where this is impacting liveability. This problem was seen as being an impediment to driving economic growth in the region, as attracting and retaining skilled workers requires access to affordable accommodation, as well as being an exacerbator of growing socioeconomic disparity amongst the population.



Sector: Social infrastructure

Sub-sector: Health and aged care

Infrastructure gap: Access to and capacity of health and aged care infrastructure

Existing pressures on the health system is not likely to decrease in the near future, with a predicted quadrupling of the population aged over 85 and a doubling of those aged over 65 by 2056.²⁸ However, the region benefits from having a single primary health network, a unique position which presents an opportunity for implementation of meaningful reform if this strategic, whole-of-system lens is applied.²⁹

Experiences in engaging with health infrastructure vary across different socioeconomic groups in the region, with more socially disadvantaged groups experiencing increased prevalence of adverse health risk factors and higher rates of disease and avoidable death than more advantaged groups.³⁰ Tasmanians will benefit from the more equitable distribution of resources to fairly achieve and maintain health and wellbeing.³¹

Key facts:

Tasmania had the highest ambulance services response times in relation to other States (2019-20).³²



Tasmanians can wait approximately

20 days

more than the Australian average for elective surgery in a public hospital.³³



First Nations Tasmanians are

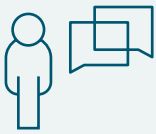
20%

more likely to be admitted to hospital than other Tasmanians.³⁴



Impact:

- Tasmania experiences higher rates of chronic conditions as compared to all other Australian jurisdictions.³⁵ The state aims to become the nation's healthiest population by 2025,³⁶ a transformation which will include improved access to and capacity of health infrastructure.
- Responding to the large and growing mental health burden in our communities is a priority.³⁷ The age standardised suicide rate is higher than the national rate.³⁸ Tasmania's suicide rate reached 19.5 per 100,000 people in 2019, up from 14.5 in 2018.³⁹
- It is increasingly difficult to plan for new health infrastructure, as constraints associated with redeveloping existing sites while managing continuing care will remain challenging, but infrastructure in the future must be flexible, scalable and adaptable to respond to changing clinical delivery.⁴⁰



Consultation feedback:

Workshop participants considered access to and capacity of health infrastructure to be a crucial element in meeting the demands of the region's growing and ageing population. Reducing average length of stay and improving bed productivity was also noted. Many stakeholders expressed the view that the region's high quality of life and liveability were key components in the region's identity and appeal – elements which rely in-part on access to quality health infrastructure.

Stakeholders also noted that Tasmania's population and services are quite dispersed, with under half of the population living in Greater Hobart. This has led to difficulties in provision of services in the outer regional areas.



Sector: Social infrastructure

Sub-sector: Education (early, primary and secondary)

Infrastructure gap: Capacity, quality and accessibility of early, primary and secondary education

Tasmania's primary and secondary school system has some of the lowest rates of high performers in the country.⁴¹ The region also suffers from below-average secondary school completion rates,⁴² and the lowest adult literacy rates of any jurisdiction in Australia.⁴³

A lack of high schools in the region to offer education beyond grade 10 has been an impediment to secondary school completion rates, although reform measures are underway to address this issue.⁴⁴ A State Government initiative to extend all high schools to year 11 and 12 is in final stages of implementation, improving greater local choices to students.⁴⁵ The education system also faces challenges with ageing school infrastructure and facilities, with investments including the revitalisation of learning spaces in many of the region's institutions.^{46, 47}

Attracting and retaining qualified specialist teachers, particularly in mathematics, has also been a long-standing issue for the state.⁴⁸ A factor in attracting this workforce is having high-quality education facilities with sufficient resources to deliver a robust program of learning. Further, the provision of this infrastructure supports a high standard of liveability in the region so as to present Tasmania as being a competitive option for relocation.⁴⁹

Key facts:

75%

of Tasmanian students agree that continuing post-grade 10 is important.⁵⁰



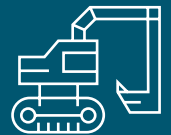
44%

of Tasmanians aged over 16 have not completed schooling beyond grade 10.⁵¹



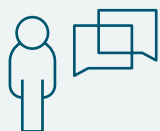
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major education infrastructure projects are currently in the planning, design or construction phase.⁵²



Impact:

- High-quality spaces and facilities for learning have been shown to contribute to improved educational attainment levels and engagement.⁵³
- A lack of available resources – particularly in terms of facilities and levels of staffing – are significant contextual elements in determining whether a student decides to leave school early or completes secondary education.⁵⁴
- Access to quality education varies significantly across Tasmania, with Index of Education and Occupation scores (designed to reflect the educational and occupational level of communities) varying dramatically across the region in representing the most disadvantaged to most advantaged quintiles of society.⁵⁵
- The Department of Education has implemented and is undertaking actions to address these challenges. For example, in 2020 a dedicated Asset Management System (AMS) was implemented, which includes condition audits of all facilities. This data, together with building age, occupancy and capacity information allows for modelling to provide a long-term view of the educational assets and is used in the State Budget submission process.



Consultation feedback:

Consultation with key stakeholders revealed quality education infrastructure to be of significant concern in the region, with many expressing concerns regarding the lower than average literacy and secondary school completion rates.

In light of a growing population and a desire to attract skilled workers and their families to the region, the need to optimise capacity and quality of the state's educational offering was seen as a key enabler of growth.

Workshop participants also noted growing socioeconomic inequality as being a significant issue for the region and considered inequitable access to high-quality education to be a contributing factor in this widening gap. Delivery of improved infrastructure and attraction of highly qualified teachers were noted as key challenges facing the region.



Sector: Telecommunications

Sub-sector:

Infrastructure gap: Broadband and mobile connectivity

Tasmania’s low population density and challenging terrain are obstacles to providing levels of digital connectivity for its population at a comparable level to elsewhere in Australia.⁵⁶ These conditions have resulted in single-carrier market dominance, the persistence of blackspots or patchy and unreliable services, and vulnerability in the event of natural disasters.⁵⁷ Stakeholders highlight these challenges still persist despite significant infrastructure investments over recent years.⁵⁸

Digital inequity is a significant issue for employers who struggle to attract and retain staff and their families.⁵⁹ This, in turn, not only impacts the productivity and profitability of industry, but also negatively impacts the prosperity of regional communities and the feasibility of various government services.⁶⁰

The ability to respond to infrastructure programs and funding opportunities is limited by multiple factors, including the smaller scale of Tasmania’s local governments limiting access to human and financial resources these jurisdictions have to proactively identify gaps, priorities, and preferred solutions.⁶¹ This leads to carrier-led responses to government initiatives that either miss areas of need or deliver solutions mis-matched to community expectation and need.⁶²

The Tasmanian Government, as part of its response to the COVID-19 pandemic, created the Premier’s Economic and Social Recovery Council’s (PESRAC).⁶³ PESRAC’s final report identified digital infrastructure (recommendation number 10) and digital inclusion (recommendations 34 and 35) as priority areas for action to address the digital divide in Tasmania.⁶⁴

Key facts:

According to the 2021 Australian Digital Inclusion Index (ADII), Tasmania was the least digitally included state overall, scoring 66 against a national average of 71.1. Every local government area in Tasmania scored below the national average, with the exception of central Hobart.⁶⁵



More than 65,000 Tasmanians are unable to participate online.⁶⁶ Barriers to participation online include access to affordable internet, digital literacy, appropriate equipment, or services.

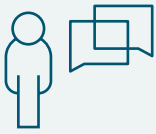


Many of the most digitally disadvantaged communities are located within jurisdictions that have limited capacity to provide financial contributions to support applications, advocate for program inclusion, or identify and prioritise funding needs.⁶⁷



Impact:

- Lack of digital connectivity constrains the ability of some Tasmanians to participate fully in society by limiting access to services delivered digitally, such as education, health, remote work and banking.⁶⁸
- Gaps and black spots in mobile connectivity limit business and tourism.⁶⁹
- Digital connectivity is critical in responding and recovering from natural disaster and other emergencies and in maintaining the safety of the community and visitors.⁷⁰ Tasmania has large areas that are prone to severe flooding, wind and storms and bushfires. During these events, landlines, internet services and mobile services are often impacted, through the destruction of network components, disruptions to supporting network infrastructure or through network congestion both during and after the event.⁷¹



Consultation feedback:

Stakeholders highlighted the importance of digital connectivity, noting that 5G and NBN coverage are still not secured in some areas, with mobile blackspots commonplace.

Engagement undertaken for the PESRAC Final Report highlighted digital connectivity and inclusion as strong themes. The report notes a recurring consultation theme relating to under-investment in digital infrastructure, resulting in poor coverage in some areas. It was highlighted that during COVID-19 restrictions, many individuals and organisations in Tasmania successfully shifted to working from home and, even as restrictions eased, many continued to work flexibly including with the use of video conferencing services. However, this was not a universal experience, with many Tasmanians not having access to digital networks, devices and literacy that makes such a transition possible.



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