



A Settlement & Investment Strategy for Burnie to 2026

Prepared for





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Choice Location Strategists is a multi-disciplinary consulting practice offering services in property economics, site selection, retail analytics, planning, research and project feasibility across a broad spectrum of property asset classes throughout Australia. The firm's strength is derived from the extensive experience and expertise of its personnel, its methodological rigour and its total independence from competing interests. Choice Location Strategists works with the private sector, all levels of government and not for profit sector to provide bespoke, research-based strategic advice to help our clients realise their property objectives.



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Executive Summary

The *Burnie Settlement & Investment Strategy* is an important planning initiative of Burnie Council and represents an integrated approach to future land use planning, urban development and investment across the Burnie municipal area.

Originally released in 2007, the Strategy is intended to guide development and investment decisions in Burnie in a manner that will provide a pattern of settlement and infrastructure provision that is achievable, orderly, economic and sustainable, and that will be relevant to future needs, capabilities and potentials.

In the intervening nine years since the Strategy was released the city's economic landscape has undergone a marked transformation as large and long-established industries have respectively ceased or markedly scaled back operations. This has been offset at least in part by the entry of new retail and service industry.

Burnie is situated within and forms a major regional centre to Tasmania's Cradle Coast Region, which occupies the western third of Tasmania.

Burnie's historic development and growth has been strongly linked to major industry, particularly pulp and mining.

The city's long-established function as a major Tasmanian industrial centre is reflected in both the physical pattern of land use, and in the culture and character of its community. Its comparatively compact settlement pattern has largely been shaped by the varied local topography. Industrial land is fragmented across a number of the flatter areas of the coastal plain, while commercial development is largely concentrated in a compact and well-defined Central Business District.

The overarching purpose of the strategy is to provide a sustainable land use planning framework that builds on Burnie's competitive advantages, responds to future drivers and influences, encourages local economic and employment growth, recognises community, landscape and environmental values and seeks to address land use planning challenges to position Burnie as prosperous and liveable regional city and preferred location in Tasmania and Australia for people to live, work and invest.

The Strategy is intended to provide

"A forward-looking sustainable and efficient land use planning and development framework that leverages competitive advantages, encourages local economic and employment growth, recognises community, landscape and environmental values, and addresses land use challenges to position Burnie as a prosperous and liveable regional city and a preferred location in Tasmania and Australia for people to live, work and invest."

This revised and updated Strategy is drafted within the framework of the Tasmanian Resource Management and Planning System and informed by and builds upon the original Strategy adopted in 2007 and subsequent planning policy developments and documents.

The use and development of land within the City of Burnie is regulated by the *Burnie Interim Planning Scheme 2013*. The Scheme assigns all land within the municipal district into one of 17 zones for establishing the purpose for how land may be used or developed into the future.



Burnie's greater reliance on manufacturing and resources, utilities and construction sectors distinguishes the city from the balance of Tasmania. A comparatively small number of larger businesses account for a large share of employment and a much larger share of regional sales derived from export markets.

Health care and social assistance, manufacturing, retail trade, education and training and public administration and safety are the five largest industry sectors by employment.

Job losses and diminished employment opportunities arising from the loss of long established manufacturing entities including the Paper Mill and Caterpillar largely account for the population contraction of the last two decades. The population appears to have stabilised more recently. Population growth remains negligible to modest.

Burnie's household mix is changing, with an increasing prevalence of smaller and child- less households. This has implications for the type of housing required. However, past medium-density housing development has not enjoyed strong market support.

The recent trend to smaller households is anticipated to continue over the decade to 2026 giving rise to a projected demand for an additional 590 dwellings (or 59 per annum) over the period on the medium (trend) growth estimate. This is consistent with recent historical trends. 570 vacant residential lot sales over the decade to end-2015 or an average 57 lots annually. Three localities on the fringe of the Burnie urban area: Romaine, Shorewell Park and Park Grove accounted for 60% of all vacant residential sales over calendar years 2014 and 2015.

Burnie's population is ageing, creating additional demand for health services and age- appropriate housing options including more independent and assisted living units.

The expansion and relocation of the UTAS Cradle Coast Campus to West Park is anticipated to give rise to a forecast 2 000 additional students and academics including a component of international students with associated accommodation requirements which is anticipated to give rise to demand for additional appropriately located, designed and affordable student housing options.

The structure and form of a development influences the cost of the installation of infrastructure and efficiency and viability of public transport delivery. An objective remains the maintenance of a compact and coherent urban settlement area with incremental growth on the urban fringe.

Burnie has a legacy of uncoordinated, fragmented industrial development that predates the adoption of town planning. The resultant pattern has adverse impacts on supply, function and amenity.

Manufacturing, processing and bulk storage and handling activities are to be encouraged to cluster in locations where there is a clear advantage for industry through the availability of large, suitable land sites, proximity to resource or workforce, secure access to available or planned transport and utility infrastructure, an established pattern of industrial use and a reasonable ability to buffer against impact on other land uses. It is intended that the remainder of the former paper mill site at South Burnie be retained for industrial purposes in accordance with a General Industry zone.

The conversion of residual residential uses in Wivenhoe to industrial is to be encouraged.

Transport and storage activities are to be promoted in locations with access to strategic transport infrastructure and main freight corridors including sea and airports, major road junctions and rail yards.



Demand for industrial land is comparatively modest, estimated at 1 900 m² per annum.

Burnie CBD is a regional hub to that part of the Cradle Coast region west of Devonport. In a retail sense, Burnie CBD functions as a 'sub-regional' centre, anchored by Kmart and Target discount department stores and Coles and Woolworths supermarkets.

Negligible population growth, comparatively high operating cost and a lack of available sites is constraining the CBD's ability to attract new commercial and retail activity and investment.

The recently formulated Burnie Town Centre Master Plan presents a programme of initiatives to rejuvenate the CBD, building on its strong existing identity and character. The implementation of the its initiatives is anticipated to enhance the internal connectivity of the CBD and fostering it as a vibrant and active town centre thereby enhancing its attraction as a regional destination for retail and related activities.

Likewise, the relocation of an expanded UTAS Cradle Coast Campus to West Park on the north western edge of the CBD is anticipated to provide significant additional patronage to the CBD, presenting opportunities for food and beverage operators and retailers oriented to the young-adult market. The relocation presents a back fill opportunity for alternative uses for the existing Mooreville Road campus.

The CBD is constrained in its ability to accommodate new larger format retail entrants by the lack of available land and the uneconomic cost of site aggregation.

Leading national large-format retailers are presently comparatively under-represented in Burnie, according to a survey undertaken by Choice Location Strategists. It found that Australian cities of comparable size to Burnie typically had an average 8.3 national brand large format retailers to Burnie's 6.

The accommodation of new large format retail in Burnie is constrained by a comparative scarcity of available, suitably zoned land and the uneconomically high cost of site aggregation. Only six commercial sites sold in Burnie in the decade to 2015 (LIST), and all of these involved parcels with an area of less than 1 000 m², too small for a conventional large format retail offer.

Burnie has a comparative lack of 4+ graded accommodation which is considered an inhibitor of the City intercepting more overnight stays by affluent visitors.

Future tourism development should increase the profile of Burnie as a tourism destination and address market gaps, particularly in the 4 star plus sector.

High-capacity visitor accommodation should be located in major settlement centres and key tourist locations.

Burnie is well endowed with cultural and recreational infrastructure. 96 hectares is zoned for Community Purposes in the Burnie Interim Planning Scheme.

Burnie contains a wealth of natural features, resources and landscapes that have underpinned and sustained the city's economic and population growth since settlement. The region is made up of a diverse range of landscape elements including coastal plains, escarpments, rivers and a natural coastline. The comparatively flatter coastal landscapes have long been the areas most sought after for settlement giving rise to land use competition.

Areas of high environmental significance and value are recognised through the reservation of land in national parks, wilderness and other conservation reserves.



There is a scarcity value to land unconstrained by environmental considerations. The planning imperative is to ensure that this land is utilised to its greatest advantage.

Primary production is recognised as the priority purpose of rural land and use or development that does not have a need or reason to be located on rural land or which is likely to interfere or conflict with rural resource use is to be limited.



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1. Introduction

The *Burnie Settlement & Investment Strategy* ('the Strategy') is an important planning initiative of Burnie Council and represents an integrated approach to future land use planning, urban development and investment across the Burnie municipal area.

Originally released in 2007, the Strategy is intended to guide development and investment decisions in Burnie in a manner that will provide a pattern of settlement and infrastructure provision that is achievable, orderly, economic and sustainable, and that will be relevant to future needs, capabilities and potentials.

The overarching purpose of the strategy is to provide a sustainable land use planning framework that builds on Burnie's competitive advantages, responds to future drivers and influences, encourages local economic and employment growth, recognises community, landscape and environmental values and seeks to address land use planning challenges to position Burnie as prosperous and liveable regional city and preferred location in Tasmania and Australia for people to live, work and invest.

In the intervening nine years since the Strategy was released the city's economic landscape has undergone a marked transformation as large and long-established industries such as the pulp and paper mill and mining equipment manufacturer, Caterpillar have respectively ceased or markedly scale back operations. This has been offset at least in part by the entry of new retail and service industry, including the opening of the Maker Centre and North West Tasmania's first Bunnings Warehouse. Statewide, the planning system has undergone reform giving rise to a more consistent planning framework and new local planning schemes.

Given the changed local circumstances and cognisant of developments in the macro-economic and political environment, Council has determined that a review of the Strategy is appropriate to ensure that the Strategy remains current and relevant over the decade ahead to 2026. Council remains committed to the core purpose and principles of the original strategy but intends that the review take a fresh look at the information and assumptions underpinning it as well as Burnie's changed circumstances and broader planning, societal and economic trends.

1.1 Report Structure

This report is structured as follows:

Chapter 1 introduces the project scope and methodology.

Chapter 2 describes Burnie and posits the city in its regional context.

Chapter 3 articulates an overarching strategic framework and planning context.

Chapter 4 examines and addresses Burnie's economic challenges.

Chapter 5 examines Burnie's demographic and housing challenges Chapter 6 addresses Burnie's Settlement Patterns & Urban Character

Chapter 7 addresses Burnie's Employment Land & Industrial Activity, including the appropriate role of the former Paper Mill site.

Chapter 8 addresses Burnie's Retail & Commercial Activity Chapter 9 addresses Tourism & Hospitality Chapter 10 addresses Transport Infrastructure Chapter 11 addresses Community Infrastructure



Chapter 12 addresses Environmental & Natural Resource Challenges, and

Chapter 13 addresses Primary Production.

1.2 Project Methodology

The project proceeded in six stages, as follows.

Stage 1: Project commencement

The project commenced with an inception meeting between Council's project steering committee and Choice Location Strategists at which the project's objectives were discussed. A literature review and data collection phase was undertaken to address information gaps.

Stage 2: Site Visits and Stakeholder Consultation

Site visits were undertaken to major infrastructure, commercial, industrial and retail precincts. A survey of retail and commercial floor space in the key retail and commercial precincts. Face to face and phone interviews were undertaken of stakeholders nominated by the project reference group which included representatives of Council, the Tasmanian government, chamber of commerce, real estate agents and major businesses and employers.

Stage 3: Economic and Social Profile

Census data, resident population estimates, business counts and other published economic and demographic data were reviewed to formulate an economic and social profile of Burnie and the wider Cradle Coast region.

Stage 4: Land Use and Infrastructure Market Assessments

An assessment of market demand and needs for residential, retail, commercial, industrial, community and tourism facilities was undertaken based on trend analysis and forward projections subject to alternate assumptions. This assessment provided the basis for an assessment of future infrastructure needs and land use planning settings.

Stage 5: Settlement and Investment Strategy

The revision of the Strategy was informed by the findings of stages 2 to 4 in consultation with Burnie City Council and the project steering group.

Stage 6: Reporting and Presentation

The finalisation process for the Settlement and Investment Strategy involves the presentation of the draft report to and its review by Council with refinements based on feedback provided.

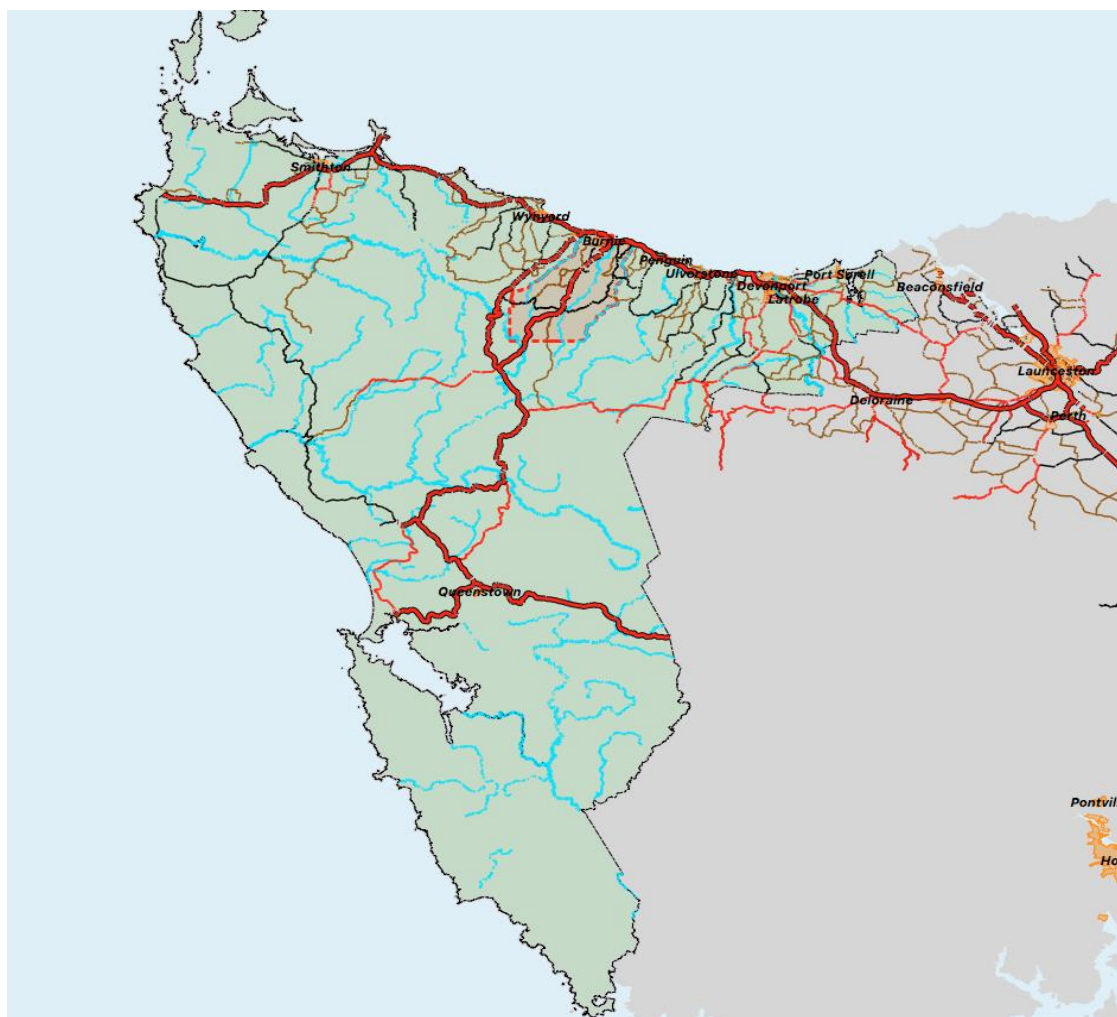


2. Location and Context

Burnie is situated within and forms a major regional centre to Tasmania's Cradle Coast Region. Occupying the western third of Tasmania and the western Bass Strait islands, Cradle Coast Region encompasses an area of 22 520 km² including the municipal areas of Kentish, Latrobe, Devonport City, Central Coast, Burnie City, Waratah Wynyard, Circular Head, West Coast and King Island.

Comprising an area of 611 square kilometres (ABS, 2011), the City of Burnie is a municipality located on Tasmania's north west coast and bounded on the north by Bass Strait. The municipality extends approximately 13 kilometres west-northwest to east-northeast and inland approximately 36 kilometres. It encompasses the port city of Burnie and localities of Ridgley and Heybridge.

Figure 2.1: Burnie in the Cradle Coast Region



Source: Choice Location Strategists

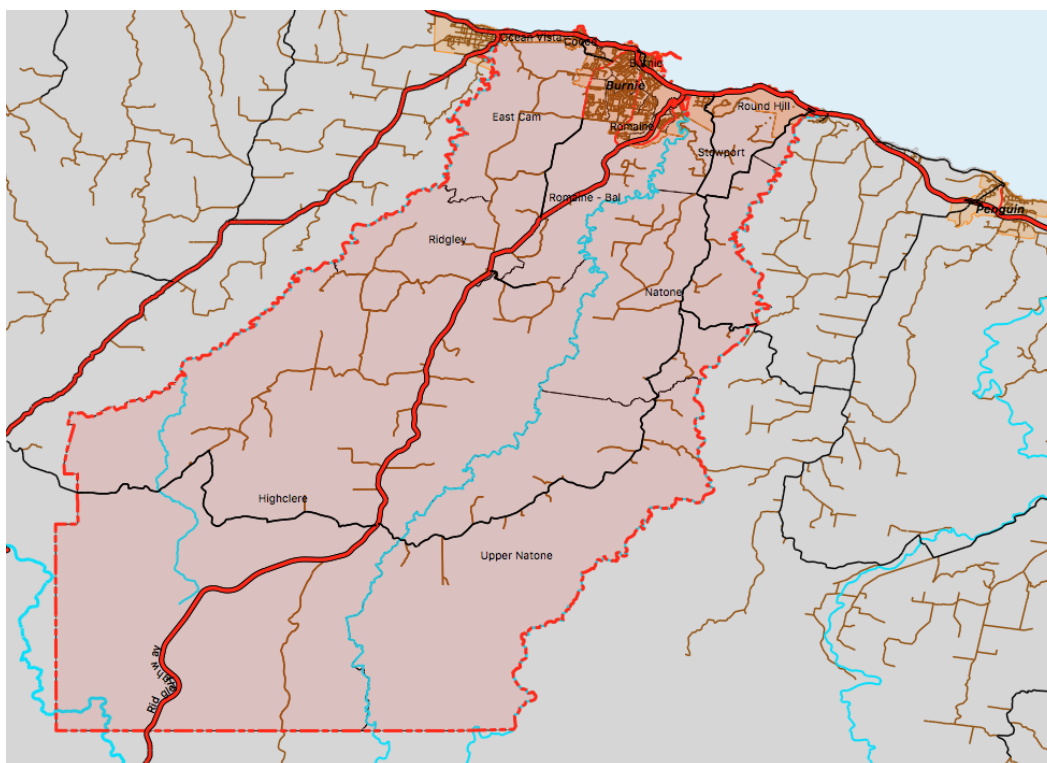
Burnie's long-established function as a major Tasmanian industrial centre is reflected in both the physical pattern of land use, and in the culture and character of its community. Its comparatively compact settlement pattern has largely been shaped by the varied local topography. Industrial land is fragmented across a number of the flatter areas of the coastal plain, while commercial development is largely concentrated in a compact and well-defined Central Business District demarcated by the highway alignment.



The main residential areas of Burnie are located south and south-west of the CBD and east-west along the coastal strip. The majority of the population and residential development is distributed in the southern and western upland sides of the City. Recent residential developments and land set aside for future residential development is also located toward the western side of the existing urban footprint.

Historically there were four settlements making up Burnie: Burnie (Emu Bay), Heybridge, Cooee and Somerset, with isolated farms and fish works on the foreshore. Cooee emerged the 1880s as a halfway point between Burnie and Somerset.

Figure 2.2: City of Burnie



Source: Choice Location Strategists

Camdale, originally part of the settlement around the Cam River (known variously as Cam River, Somerset, Port Maldon) grew with the growth of Somerset.

Parklands was a 1920s garden suburb extension of Burnie, the subdivision prompting Council's acquisition of Burnie Park. Ocean Vista, a stand-alone subdivision was a westerly extension of Cooee coinciding with post war extension of Cooee southwards. There has been recent subdivision on the escarpment above Parklands and Cooee.

The urban areas are distinguished in part by 'landscape separators', remnants of the open areas that separated the original settlements.

Industrial land is fragmented across a number of the flatter areas of the coastal plain, while commercial development is largely concentrated in the Central Business District. Recent residential developments and land set aside for future residential development is also located toward the western side of the existing urban footprint.



3. Strategic Framework

3.1 Strategic Purpose

The Burnie Settlement and Investment Strategy presents a framework for the future development of Burnie from a land use and investment perspective. It is intended to provide

“A forward-looking sustainable development framework and efficient land use planning system that leverages competitive advantages, encourages local economic and employment growth, recognises community, landscape and environmental values, and addresses land use planning challenges to position Burnie as a prosperous and liveable regional city and a preferred location in Tasmania and Australia for people to live, work and invest.”

The primary purpose of the Strategy is to ensure that adequate and appropriately located land is available to accommodate the projected housing and employment needs of Burnie’s population in the decade through to 2026. The Strategy sets the policy framework intended to guide development and investment decisions resulting in a pattern of settlement and infrastructure provision that is achievable, orderly, economic, sustainable and relevant to future needs, capabilities and potentials.

3.2 Strategic Context

This revised and updated Strategy is drafted within the framework of the Tasmanian Resource Management and Planning System and informed by and builds upon the original Strategy adopted in 2007 and subsequent planning policy developments and documents. These include the Tasmanian Government’s regional planning reform program, *The Cradle Coast Regional Land Use Strategy 2010 – 2030* and the *Burnie Interim Planning Scheme* and *Making Burnie 2030*.

The Tasmanian Resource Management and Planning System is intended to provide a logical and consistent strategic policy and statutory process that will assist all levels of government, industry and the community to set common goals, balance competing interests, and manage the impacts of land use and development in support of the State’s long-term economic, environmental and social goals.

The Cradle Coast Regional Land Use Strategy 2010 – 2030 is intended to guide the land use planning process in the Cradle Coast Region over the twenty years to 2030 and beyond and inform the purpose and content of local planning schemes.

Formulated in September 2011, *Making Burnie 2030* is community strategic plan which articulates a number of strategic objectives grouped under broad future direction statements. It includes community profile indicators with baselines and aspirational targets for 2030.



3.3 Strategic Principles

From this strategic and policy framework the following set of planning principles for Burnie have been distilled which are elaborated upon in the body of the Strategy.

Land Use

Land is to be used in the manner best matched to its highest capacity to support social, cultural and economic endeavour while always protecting the health of the environment.

Adequate land is to be provided for –

- Housing
- Economic activity
- Community purposes
- Conservation
- Primary production

A Compact City

- Established settlement areas are to be the focus for growth and development.
- Land supply is to be matched to need and sufficient land is to be supplied within the designated urban settlement boundaries to meet the needs of a time horizon of not less than 10 years but not exceeding 20 years.
- Areas of expansion should be contiguous with established settlement areas.
- and release should be sequenced progressively and consistent with the capacity and orderly provision of infrastructure.

Housing

- Sufficient land to accommodate forecast housing demand for at least 10 years is to be identified. In addition to greenfield sites, this may be through infill, redevelopment or increased densities.
- Choice and diversity in the location, form and type of housing is to be facilitated.

Industry & Employment

- In relation to manufacturing and processing activities, a distinction needs to be made between export-focused industry and local service industry.
- Manufacturing, processing and bulk storage and handling activities should be clustered in locations where there is a clear advantage for industry through the availability of large, suitable land sites, proximity to resource or workforce, secure access to available or planned transport and utility infrastructure, an established pattern of industrial use and a reasonable ability to buffer against impact on other land uses.
- Transport and storage activities should be promoted in locations with access to strategy transport infrastructure and high productivity vehicle access freight corridors including sea and airports, major road junctions and rail yards.
- Industrial land should be protected from encroachment by large format retail activity.



Tourism

- Burnie aspires to provide ‘a five-star visitor experience on the edge of adventure’.
- High-capacity visitor accommodation should be located in major settlement centres and key tourist locations.
- In addition to meeting local demands Burnie is a focus for the provision of regional business, commercial and community services in the Cradle Coast Region.

Retail and Commercial Activity

- Retail provision should be proportionate to the settlement size and its function as a regional and district centre.
- The integrity, viability and vitality of its established commercial centres is to be maintained by locating new business and commercial development on land within or immediately contiguous with existing town centres and commercial zones.
- Bulky and large format retailing is to be provided in designated locations. Conventional retailing is to be encouraged within and restricted beyond town centres.
- The supply of appropriately zoned land should be sufficient to accommodate new entrants and emerging business models. This may entail the repurposing of underutilised land found to be superfluous to current or anticipated requirements in its current zone setting.
- Proposals for major business or commercial developments outside designated town centres need to be supported by demonstration of need and of an absence of suitable alternative sites and of an adverse effect on established town centres and the regional pattern of retail service provision.

Primary Production

- Primary production is recognised as the priority purpose of rural land and use or development that does not have a need or reason to be located on rural land or which is likely to interfere or conflict with rural resource use is to be limited.
- Uses or development that is directly associated with and subservient to rural resource uses is to be facilitated.
- As a community and commercial services centre to the broader Cradle Coast Region, effective, efficient and integrated transport linkages that connect Burnie with the state, region and world are critical.

3.5 Burnie Interim Planning Scheme

The use and development of land within the City of Burnie is regulated by the *Burnie Interim Planning Scheme 2013* (the ‘Scheme’). It was declared on 16 October 2013 as part of the Tasmanian government’s planning reform program that aims to deliver contemporary and more consistent planning schemes across the state. The Scheme assigns all land within the municipal district into one of 17 zones for establishing the purpose for how land may be used or developed into the future. Table 3.1 outlines the intent of each zone.



Table 3.1: Zones & Intent

Zone	Purpose
General Residential Zone	Coinciding with the Burnie Urban Area, this zone is intended to provide fully serviced land for suburban density housing and allied activity in a suburban setting or small scale urban centre.
Low Density Residential	Located on Burnie's urban fringe, the Low Density Residential zone is intended to provide land for housing and allied activity to support and service the local community in areas constrained by limited availability of services or by environmental factors. Low Density Residential use may require lots larger than otherwise available within the General Residential zone.
Rural Living	To provide land for residential use on larger lots as a housing estate embedded within a rural setting attractive for living due to topography, aspect, outlook and proximity to urban centres. Lot sizes may range from a few thousand square metres to several hectares depending on site and locality characteristics and conditions.
Environmental Living	To provide for residential use or development in areas where existing natural and landscape values are to be retained. This may include areas not suitable or needed for resource development or agriculture and characterised by native vegetation cover, and where services are limited and residential amenity may be impacted on by nearby or adjacent rural activities.
Village Zone	To provide land for integrated business, residential and community purpose use in a small rural settlement
Community Purpose Zone	To provide land for community purposes uses such as education and health care that cannot be integrated within an alternate zone.
Recreation Zone	To provide land for sports, active recreation, and events that cannot be integrated within an alternate zone.
Open Space	To provide land for open space purposes including for passive recreation and natural or landscape amenity.
Local Business	To provide land for business, professional and retail activity servicing convenience needs of a local community.
Central Business	To provide land for business, civic, cultural and community, retail and refreshment, professional and tourist functions servicing a major centre of a region or sub-region.
Commercial	To provide land for bulky goods, large format retail and service industry serving the region or sub-region.
Light Industrial	To provide for manufacturing, processing, repair, servicing, storage and distribution of goods and materials if off-site impacts are minimal or can be managed to minimise conflict or impact on the amenity of any other use.



Zone	Purpose
General Industrial	To provide land for manufacturing, processing, repair, service, storage and distribution of goods and materials likely to impact on neighbouring uses.
Rural Resource	To provide land for primary production such as agriculture, forestry and mining and for other use or development that does not constrain or conflict with resource development, including resource processing
Utilities	To provide land for major utility installations and corridors, and may include complementary use
Environmental Management	To provide land for protection and conservation of land with significant ecological, scientific, cultural or aesthetic value, or significant likelihood of risk from as natural hazard.
Port and Marine	To provide land for port and marine activity related to shipping and transport of freight and passengers.



4. Economic Challenges

Burnie's greater reliance on manufacturing and resources, utilities and construction sectors distinguishes the city from the balance of Tasmania. A comparatively small number of larger businesses account for a large share of employment and a much larger share of regional sales derived from export markets (O'Brien, 2009). The resources, utilities and construction share of total turnover in the Burnie region is almost double the share for the rest of Tasmania, while manufacturing in Burnie also accounts for a relatively large turnover share. The globalization of markets has led to increasing pressure on many established industries in the Burnie region, decreasing the scale of some traditional economic activities and escalating the need for diversification of the industrial base to both maintain and increase regional prosperity.

Health care and social assistance, manufacturing, retail trade, education and training and public administration and safety are the five largest industry sectors by employment.

Burnie experienced a net loss of approximately 821 local jobs over the nine years to mid- 2015 with large nominal contractions in manufacturing (-390), administration and support (-275), retail trade (-165) and transport, postal and warehousing (-157). These were partially offset by employment gains in health care and social assistance (+95), education and training (+198), public administration and safety (+108) and accommodation and food services (+150).

Table 4.1 sets out an estimate of local employment by key industry sectors over time derived from census place of work data and business counts. Employment estimates for 2013 and 2015 are based on business counts and average work place size estimates.

Table 4.1: Burnie Employment by Industry 2001-2015, leading industry sectors

Industry Sector	2001	2006	2011	2013	2015	2006-2015
Health Care and Social Assistance	1 389	1 442	1 493	1 380	1 537	95
Manufacturing	1 395	1 652	1 289	1 152	1 262	- 390
Retail Trade	1 570	1 361	1 317	1 279	1 196	- 165
Education and Training	732	881	946	994	1 079	198
Public Administration and Safety		924	1 023	1 032	1 032	108
Accommodation and Food Services	295	540	576	637	690	150
Transport, Postal and Warehousing	542	592	486	596	435	- 157
Construction	373	453	421	387	371	- 82
Professional, Scientific and Technical Services		327	295	270	341	14
Sub-total		8 172	7 846	7 727	7 943	- 229
Other		2 263	1 977	1 950	1 671	- 592
Total Industries		10 435	9 823	9 677	9 614	- 821

Sources: Australian Bureau of Statistics – Work Place Data 2001, 2006 and 2011 Censuses, Business counts, Choice Location Strategists

Economic Challenges

Issue and Context	Objectives	Strategies	Actions
<p>Burnie is located within the Cradle Coast Region of North West Tasmania. Burnie and Devonport are the region's two major population centres and both fulfil a regional service role in terms of administration, commerce, employment, entertainment and community functions.</p> <p>Burnie functions as the regional centre to the western part of the Cradle Coast region. Burnie's historic development and growth has been strongly linked to major industry, particularly pulp and mining.</p> <p>The regional economy remains largely based on primary and secondary economic sectors, particularly agriculture, mining and manufacturing.</p> <p>Job losses and diminished employment opportunities arising from the loss of long established manufacturing entities including the Paper Mill and Caterpillar largely account for the population contraction of the last two decades.</p> <p>The population appears to have stabilised more recently. Population growth remains negligible to modest.</p>	<p>To reinforce Burnie's position as a major regional centre to the Cradle Coast Region and hub for trade, business, employment, transport, culture and leisure activities, health and education services.</p> <p>To promote Burnie's economic base.</p> <p>To support the operation of existing enterprise.</p> <p>To attract and retain new business to Burnie that leverages the city's skill base and supply chains.</p> <p>To foster diversity, growth and development for business and industry.</p> <p>To transition functionally obsolete precincts to more suitable alternative uses.</p> <p>To transition functionally obsolete precincts to more suitable alternative uses.</p>	<p>Formulate a business and residential attraction strategy highlights synergies and leverages Burnie's existing supply chain.</p> <p>Position Burnie as a cost-competitive place in which to establish and maintain a business.</p> <p>Selective rezoning of land identified as functionally obsolete for its current zone purpose to a higher and better use.</p>	<p>In consultation with business leaders, develop a marketing prospectus extolling the advantages and benefits of Burnie as a location to live and work and establish a business.</p> <p>Benchmark operating costs (rent, land tax, municipal and water rates) against comparable Australian urban centres.</p> <p>Arrange regular meetings between Council and local business leaders and commercial land owners to provide a forum for discussion of business operational issues.</p> <p>Advocate for more competitive freight options.</p> <p>In consultation with business leaders, develop a marketing prospectus extolling</p>



Issue and Context	Objectives	Strategies	Actions
	<p>To foster market and investment opportunities for business and industry;</p> <p>To provide increasing employment for existing and future residents;</p> <p>To provide education opportunities for existing and future residents;</p> <p>To encourage population growth to sustain and extend services;</p> <p>To ensure the provision of well-developed transport infrastructure;</p> <p>To provide for cost-effective infrastructure services.</p>	<p>Identify, address & reduce cost factors inhibiting new capital investment in Burnie.</p>	<p>the advantages and benefits of Burnie as a location to live and work and establish a business.</p> <p>Regular meeting between business leaders and council to identify opportunities and impediments.</p>

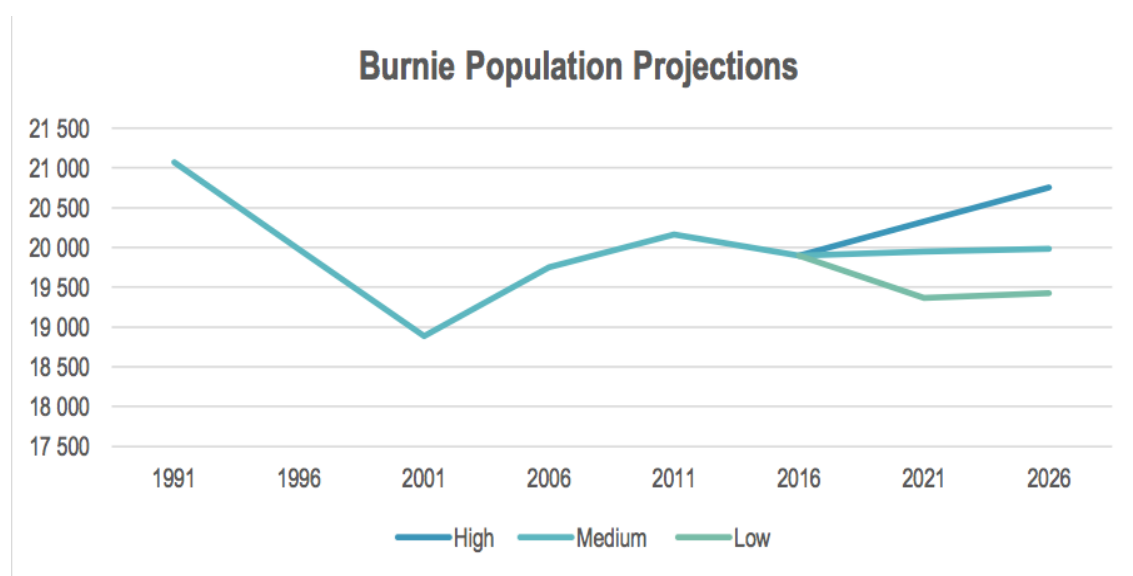
5. Demographic & Housing Challenges

The economic and population growth of Burnie are closely interconnected, with historic periods employment growth stimulating population growth as workers and their families are attracted to the region to take up employment opportunities. More recently, job losses and diminished employment opportunities associated with the decline of the local manufacturing base has discouraged new arrivals and encouraged some residents to move on in pursuit of opportunities elsewhere.

These changing economic fortunes are reflected in Burnie's population which has fluctuated over the last two decades. Peaking at 21 071 in 1991, the municipality lost 2185 residents over the subsequent decade falling to a low of 18 886 in 2001 as the pulp and paper mill rationalised operations and reduced local employment opportunities.

The city's population recovered somewhat over the decade to 2011, gaining 1 278 new residents. A further modest decline of 264 was recorded over the five years to 2016 in the wake of large scale job losses associated with the paper mill's closure and off-shoring of mining equipment manufacturer, Caterpillar.

Figure 5.1: Estimated and Projected Population – City of Burnie 1991-2026



Sources: Australian Bureau of Statistics, Tasmanian Department of Treasury, Choice Location Strategists

The resident population at 30 June 2016 is estimated at 19 900. Based on trend analysis, this is anticipated to increase modestly to 19 949 by 2021 and 19 984 by 2026.

Notwithstanding a fall in the absolute resident population level over the 25 years to 2016, Burnie gained 626 additional households (or an average 25 annually) on the back of a secular trend to smaller household sizes. The average number of persons per occupied dwelling fell from 2.88 in 1991 to 2.50 in 2016.

The main residential areas of Burnie are located south and south-west of the CBD and east-west along the coastal strip. The majority of the population and residential development is distributed in the southern and western upland sides of the City. Recent residential developments and land set aside for future residential development is also located toward the western side of the existing urban footprint.

According to 2011 census Burnie had 8 623 dwellings of which 7 864 (91.2%) were occupied. The occupancy rate compares favourably with that of Hobart (90.3%) and the Tasmania overall (85.6%). The current stock of dwellings at mid-2016 is estimated based on the quantum of dwelling approvals since 2011 having regard to the historic relationship between total dwelling approvals and net gains in the housing stock as indicated by the census count.

Burnie's household mix is changing. The 2011 census found couple families without children outnumbered couple families with children for the first time following a sustained trend. Over the twenty years to 2016 Burnie gained an estimated 421 couple families without children but lost 706 couple families with children. Looking ahead to 2026, the city is anticipated to gain a further 307 childless couples offset by the loss of an estimated 322 couple families with children.

Single parent families have also been trending upwards over time, increasing by 182 over the 20 years to 2016. The other stand out gain has been in the number of lone person households, which increased by 503 over the 20 years to 2016 and are anticipated to increase by a further 345 over the decade to 2026.

The increasing prevalence of smaller households comprising couples without children, single parents or persons living alone, should, all things being equal, give rise to increased demand for smaller dwellings such as town houses, units or apartments. Somewhat perversely, demand for apartments as indicated by the total number occupied actually fell over the fifteen years to 2011 according to census data. Detached dwellings remain the prevalent and seemingly preferred housing type.

The recent trend to smaller households is anticipated to continue over the decade to 2026 giving rise to a projected demand for an additional 590 dwellings (or 59 per annum) over the period on the medium (trend) growth estimate. This is consistent with recent historical trends. Property Transaction Data from Land Information System Tasmania (the List) identified 570 vacant residential lot sales over the decade to end-2015 or an average 57 lots annually.

Table 5.1 extrapolates this increase in dwelling numbers into projected take up of residential land. An overall dwelling yield of 16-20 per hectare has been assumed based on 80% separate dwellings at 12-15 per hectare and 20% units and apartments at 40-50 per hectare. Trend demand would give rise to the projected take up of an estimated 6.9 hectares of residential land over the ten years to 2026. Demand would range from 3.8 hectares under the Low scenario to 10.6 hectares under the high.

Locations with coastal views and cost-effective flatter sites are preferred. Three localities on the fringe of the Burnie urban area: Romaine, Shorewell Park and Park Grove accounted for 60% of all vacant residential sales over calendar years 2014 and 2015.

Table 5.1: Projected indicative demand for residential land

Additional households	2011-16	Total		Average annual	
		2016-21	2021-26	2016-21	2021-26
Trend Growth	86	360	230	72	46
Low Scenario	86	117	234	23	47
High Scenario		513	404	103	81
Apportionment between Dwelling types					
Projected proportion detached dwellings		80%	80%		
Projected proportion units & apartments		20%	20%		
Projected dwelling yield per hectare					
Separate houses		12	15	2.4	3.0
Units & apartments		30	40	6.0	8.0
Blended		16	20	3.1	4.0
Projected Land requirements (hectares)					
Trend Growth		23	12	4.6	2.3
Low Scenario		7	12	1.5	2.3
High Scenario		33	20	6.6	4.0

Source: Choice Location Strategists

Table 5.2: Historic and forecast resident population and household numbers – City of Burnie

	1991	1996	2001	2006	2011	2016	2021	2026	1991-2011	2016-2026
Estimated Resident Population	21 071	19 977	18 886	19 748	20 164	19 900	19 949	19 984	- 907	84
Occupied Dwellings										
Average household size	2.88	2.72	2.57	2.59	2.56	2.50	2.40	2.34		
Separate house	6 337	6 418	6 287	6 689	6 948				611	
Semi-detached, row or terrace house	373	251	380	275	342				- 31	
Flat, unit or apartment:	514	566	603	624	533				19	
Other/not Stated	100	118	84	30	35				- 65	
Total Occupied	7 324	7 353	7 354	7 618	7 864	7 950	8 310	8 540	540	590
Unoccupied										
Separate houses	365	538	569							
Semi-detached, row or terrace house	39	40	54							
Flat, unit or apartment:	67	159	184							
Total Unoccupied	487	799	827	657	759	820	660	630		
Vacancy rate	6.2%	9.8%	10.1%	7.9%	8.8%	9.4%	7.4%	6.9%		
Total Dwellings	7 811	8 152	8 181	8 275	8 623	8 770	8 970	9 170		
Net Dwelling Additions		341	29	94	348	151	200	200	348	49
Dwelling Approvals				255	325	168				
	1991	1996	2001	2006	2011	2016	2021	2026	1996-2016	2016-2026
Couple family with no children		1 829	1 921	2 066	2 144	2 250	2 421	2 557	421	307
Couple family with children		2 506	2 129	2 085	2 021	1 800	1 655	1 478	- 706	- 322
One parent family		855	853	976	982	1 037	1 116	1 179	182	142
Other family		58	48	59	57	57	59	60	- 1	3
Total families		5 248	4 951	5 186	5 204	5 144	5 251	5 273	- 104	129
Lone person households		1 806	1 998	2 020	2 215	2 309	2 500	2 654	503	345
Group households		160	169	176	200	207	226	241	47	34
Other households		142	234	236	245	290	333	371	148	81
Total households		7 356	7 352	7 618	7 864	7 950	8 310	8 540	594	590



Demographic & Housing Challenges

Issue and Context	Objectives	Strategies	Actions
<p>The economic and population growth of Burnie are closely interconnected, with the city's historic growth driven by the expansion of its heavy manufacturing base.</p> <p>The population losses experienced over the last two decades are largely attributable to job losses in manufacturing associated with the wind-down and closure of the paper mill and loss of Caterpillar.</p> <p>Burnie's low to negligible population growth is discouraging new economic activity and investment by constraining demand and financial feasibility.</p> <p>Burnie's population is ageing.</p> <p>An inadequate supply of residential land has the potential to constrain growth and considered to have sufficient stock of residential land for forecast requirements to 2026 and beyond.</p> <p>A trend to smaller households is anticipated to continue over the decade to 2026 giving rise to a projected demand for an additional 590 dwellings (or 59 per</p>	<p>To boost population growth.</p> <p>To position Burnie as a preferred residential location.</p> <p>To ensure adequate provision of residential land</p> <p>To provide for a premium quality of life for existing and future residents;</p> <p>To ensure the health and well-being of the community improves over time;</p> <p>To provide for alternative and affordable housing choices;</p> <p>To provide equitable access to services and facilities for all residents;</p>	<p>Identify and facilitate emergent, job-rich development proposals which complement the local economy, address market gaps and activate underutilised sites.</p> <p>Convenient access to health care facilities</p> <p>Encourage utilisation of open space and recreational facilities.</p> <p>Efficient and timely release of residential land.</p> <p>Encourage and facilitate the development of additional independent and assisted living units.</p> <p>New land release areas must have access secured to water, power, gas and roads through liaison with regional providers and negotiation between relevant parties.</p>	<p>Identify any service gaps.</p> <p>Promotion of recreation strategy.</p> <p>Monitor the existing development pipeline.</p> <p>Establish a trigger point for additional residential land release.</p> <p>Establish a long term residential land</p>



Issue and Context	Objectives	Strategies	Actions
<p>annum) over the period on the medium (trend) growth estimate.</p> <p>Burnie's median household size is declining however detached single family dwellings continue to predominate.</p> <p>Past medium-density housing development has not enjoyed strong market support.</p> <p>The expansion and relocation of the UTAS Cradle Coast Campus to West Park is anticipated to give rise to a forecast 2 000 additional students and academics including an estimated 150 international students with associated accommodation requirements.</p> <p>An inadequate supply of residential land constrains growth and places upward pressure on prices.</p> <p>A trend to smaller households is anticipated to continue over the decade to 2026 giving rise to a projected demand for an additional 590 dwellings (or 59 per annum) over the period on the medium (trend) growth estimate.</p>	<p>To shape land use and development to accommodate and better serve an ageing population.</p> <p>To ensure adequate, suitably serviced, affordable and appropriately located land is available and located to meet projected housing needs.</p> <p>To ensure housing options address emerging market needs and aspirations.</p> <p>To ensure Burnie has sufficient, appropriately located, designed and affordable student housing options to accommodate the forecast additional tertiary students.</p> <p>To ensure adequate, suitably serviced, affordable and appropriately located land is available and located to meet projected housing needs;</p>	<p>New development should include a range of well-designed housing choices.</p> <p>Higher density residential development should be consolidated and encouraged in existing urban areas through redevelopment/infill close to community services</p> <p>Prioritise student housing within West Park's immediate hinterland.</p> <p>Areas with existing services should be prioritised for residential development and rezoning over other land</p> <p>New land release areas must have access secured to water, power, gas and roads through liaison with regional providers and egotiation between relevant parties.</p> <p>New development should include a range of well-designed housing choices.</p>	<p>release strategy.</p> <p>Give preference for residential development on vacant residential zoned land</p> <p>Qualitatively assess housing preferences and choices of smaller households by household type.</p> <p>Periodically liaise with UTAS management to understand student housing needs, aspirations and deficiencies.</p> <p>Monitor the existing development pipeline.</p> <p>Establish a trigger point for additional residential land release.</p> <p>Establish a long term residential land release strategy.</p> <p>Give preference for residential development on vacant residential zoned</p>



Issue and Context	Objectives	Strategies	Actions
Past medium-density housing development has not enjoyed strong market support.			land Qualitatively assess housing preferences and choices of smaller households by household type.



6 Settlement Patterns & Urban character

Issues and Context	Objectives	Strategies	Actions
<p>The structure and form of a development influences the cost of the installation of infrastructure and efficiency and viability of public transport delivery.</p>	<p>To maintain a compact and coherent urban settlement area with incremental growth on the urban fringe.</p> <p>To ensure new lands are supported by infrastructure services;</p> <p>To provide for an orderly arrangement of new lands to accommodate growth.</p> <p>To adequately provide for residential, industrial, commercial and community growth in an orderly manner</p> <p>To manage growth in a way that enhances the region's distinct character.</p> <p>To provide an appropriate mix of land uses including land for houses, employment, open space, recreational space and green space;</p> <p>To ensure new lands are supported by infrastructure services;</p> <p>To protect and enhance the overall character</p>	<p>Established settlement areas are to be the focus for growth and development.</p> <p>The future approval of new residential development to consider projected population growth, changing demographics, take-up rates, development trends, prices and affordability, and the quality and diversity of available residential product.</p> <p>Give preference to development resulting in urban growth and consolidation on land adjacent to existing urban land which economic to service.</p> <p>The Burnie Interim Planning Scheme assigns land to a range of prescribed purposes.</p> <p>Future built form is to reflect the existing positive design aspects of character, streetscape and landscape;</p> <p>Base urban form should on 'neighbourhood planning principles', which maximise pedestrian access across the settlement areas, and provide access to services and facilities;</p> <p>The Burnie Interim Planning Scheme assigns land to specific zones to provide for a range of land use by residential,</p>	<p>Prioritise redevelopment and rezoning proposals in areas with existing services.</p> <p>Focus land release on areas contiguous to the established urban area and proportionate to market demand.</p> <p>Encourage higher density development within the existing urban area with a preference for infill sites proximate to community services.</p> <p>Closely consider infrastructure access in land subdivision proposals.</p> <p>Monitor building and planning approval activity as a leading indicator of demand.</p> <p>Council to prepare desired character statements for each locality and include provisions in the development control plan to ensure new development enhances the desired character and is based on the planning principles;</p> <p>Establish building heights to reflect the future form and function of the settlement and manage visual impacts in urban and coastal areas.</p> <p>Only permit further residential development and zones in areas where there will be no</p>



	<p>and identity of the community.</p> <p>To have regard to the rural character and heritage significance of small settlements and the need to maintain that character and significance.</p> <p>To ensure future settlement strengthens our landscape and scenic values.</p> <p>To remedy and mitigate conflicting land use situations.</p> <p>To manage and promote our cultural and historical assets.</p> <p>To ensure future settlement strengthens our landscape and scenic values.</p>	<p>community purpose, business, industry, rural resource, industrial, utility, transport and environmental conservation categories in accordance with reasonably foreseeable need, land capability and availability of utilities and other infrastructure.</p> <p>Ensure new land release areas have access secured to water, power, gas and roads through liaison with regional providers and negotiation between relevant parties</p> <p>Future built form is to reflect the existing positive design aspects of character, streetscape and landscape.</p> <p>Consolidate fragmented activity in appropriately located and zoned activity clusters.</p>	<p>conflict with existing industrial, commercial or agricultural uses</p> <p>Prepared and maintain a register of historic or culturally significant assets graded according to significance.</p> <p>Only permit further residential development and zones in areas where there will be no conflict with existing industrial, commercial or agricultural uses</p> <p>Prepared and maintain a register of historic or culturally significant assets graded according to significance.</p>
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7. Employment Land & Industrial Activity

Burnie aspires to be a globally competitive business community, focused on the development of niche and premium products developed by a highly skilled workforce with a focus on innovation and entrepreneurship. Its self-perception is as a City of Makers.

Land Use planning processes for economic activity is intended to facilitate the supply of employment land in all settlement areas for industrial, business and institutional use. It is to ensure locations for employment use accommodate new forms and changing patterns of economic activity.

Employment land should be provided in locations where the land is physically capable of development, transport access and utilities can be provided at reasonable economic, social and environmental cost, where there is access to resource, energy, communication and workforce and sufficient separation can be provided to buffer impact on natural values, economic resources and adjoining settlement.

Economic activity and employment lands should be protected against intrusion by alternate forms of use or development.

Employment land should only be converted to non-employment use only where the land is not required, is incapable of effective use for employment purposes over the long term, conversion will not adversely affect the overall efficiency of other employment land in the vicinity, there is a need for conversion and the land is suitable for the proposed alternative use.

7.1 Background

The pattern, placement and presentation of industrial development in Burnie has largely emerged without the benefit of coordinated land use strategy or a consistent concern for development performance standards. This has given rise to a number of legacy issues and emerging concerns in relation to supply, functional, amenity and environmental aspects of using land for industrial purposes.

Industrial development in Burnie commenced with agricultural processing, servicing for west coast mines from 1870s onwards. Burnie became the main port for the west coast mines after the opening of the Emu Bay Railway in 1897. The port and railway subsequently became the focus for Burnie's industrial and commercial development which from the 1930s onwards was focused on the APPM paper mill.

The city's manufacturing capacity has contracted in recent years. After 75 years of operation the pulp and paper closed in 2010. At its peak the mill employed 3 500 people. More recently Caterpillar relocated its mining machinery operations to Thailand with the reported loss of 280 local jobs.

Notwithstanding these setbacks, major sophisticated manufacturing capacity remains and there has been significant recent investment in the upgrade of industrial plant at Lion, one of Australasia's largest food and beverage manufacturers and the Surrey Hill Mill with associated employment creation.

7.2 Pattern of Industrial Development

The Australian Bureau of Statistics Mesh Block1 count of 2011 identified approximately 370 hectares² of land characterised as industrial. The major land allocations for industrial use occur within the narrow coastal plain between Heybridge and Camdale, often with a linear alignment paralleling the shoreline so as to utilise available level land. The balance of industrial use areas are located over several sites in the urban uplands of Burnie. Individual locations comprise relatively small-scale pockets, with the majority under 20 ha in area. No precinct exceeds 80ha in area; Few existing industrial precincts are fully developed. Many sites are either underutilised or vacant. Occupancy is estimated at 55% of total industrial land, or some 200 ha. In some locations vacancy can exceed 50% of total land area.

Figure 7.1: Location of Burnie's Industrial Land



Source: Burnie Interim Planning Scheme, Choice Location Strategists

Many industrial sites provide restricted potential for increased utilisation given constraints imposed by factors such as slope, access, servicing capacity, proximity to other land use types, or legacy issues resulting from a former occupation. Some 60% (95 ha) of vacant designated industrial land may be unsuitable for development due to operation of one or more of these constraints.

Principle industrial complexes have been located to maximise advantage of proximity to transportation routes, positioned along the Bass Highway and western railway, and near the Port of Burnie. The former paper mill site had both highway and railway frontage and port proximity. However, while some sites appear to have been consciously or coincidentally located close to major transport routes on the coastal plain, several upland sites are relatively remote and have poor access to major transport infrastructure.

Industrial estates have developed around the original settlement nodes at Wivenhoe, South Burnie, Cooee, and Camdale. Continued growth and expansion has occurred within the former mixed-use residential areas. This pattern was recognised and endorsed by subsequent designation to industrial zone when planning controls were introduced. Complete transition to industrial use has yet to occur with mixed activity including residential, community and recreation continuing to

coexist. The close proximity of often incompatible land use categories presents a limitation to intensification or reuse.

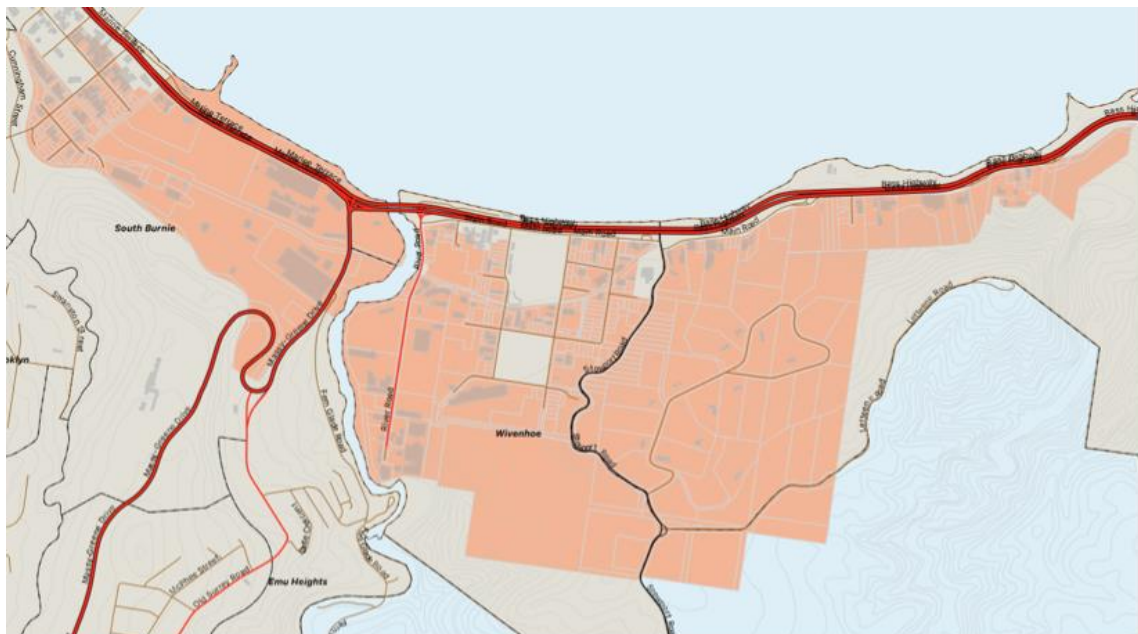
The 2005 Burnie Industrial Strategy compared the apparent supply of non-differentiated industrial land to the specific requirements for contemporary industrial sites: large lots and flat land, noting that much of the land zoned for industrial use would not meet current day expectations. In addition, where Burnie was competing with other locations to attract industries (foot loose industries) it needed to be able to demonstrate it was a location that would attract skilled workers with suitable residential areas and amenity.

Industry and its requirements was categorised as follows:

- Service and support industries – not necessarily accommodated in areas with a distinctive industrial character;
- Manufacturing and processing – scale and location requirements determined by resource, available land and logistics factors and access to a skilled labour force
- Transport and support activities necessarily located near primary transport routes.

The strategy recommended reducing the amount of less suitable land then zoned industrial. The recently published SGS Study identified 428 industrial lots in Burnie LGA, with a total land area of 202.2 hectares. Of this total 35 lots with an aggregate area of 22 hectares are vacant. Approximately 17.5 hectares of vacant land is in the Burnie area (20 lots) and the remaining 15 lots (4.7) are located in Cooee-Camdale. The assessment of suitability concluded that 14 of the 20 parcels are not suitable for industrial use. Six parcels (4.5 hectares) were discounted on account of slope. Another 2 hectares across 14 lots were discounted due being within or adjacent to sensitive uses. The 6.5 hectares located next to Burnie Port was identified as strategically important, with the advantage of being contained in a single lot.

Figure 7.2: Industrial Land at Wivenhoe and South Burnie



Sources: Australian Bureau of Statistics 2074.0 - Census of Population and Housing: Mesh Block Counts, LIST

In Cooee-Camdale, all 15 parcels are considered suitable for industrial use, however 1.6 hectares within these parcels have been discounted due to their slope.

The key drivers of demand for industrial land going forward are anticipated to be transport, warehousing and related activities. These activities require large footprints and consequently have relatively significant land requirements.

8.3 The Former Paper Mill Site

The former paper mill site is considered one of the region's three most strategic precincts to future meet demand by transport and warehousing and related activities. With an extensive frontage to Marine Terrace on the eastern approach to Burnie CBD it is a prominent site.

However, six years have elapsed since the Paper mill closed in July 2010 without the emergence of an alternative industrial use for the site. The emergence of new large scale industrial activity in Tasmania faces headwinds from comparatively high transport costs (especially shipping). Consultations with TasPorts found that immediate proximity to the port, while desirable, is not critical and land within 10-15-minute drive time of the port is considered satisfactory.

Development economics and the comparative scarcity of suitably zoned commercial sites of sufficient size to accommodate large format retail elsewhere make the site attractive to potential large-format retail. A 3-hectare section of the paper mill site was rezoned to accommodate Bunnings Warehouse which opened in early 2014.

However, it is Council's intention that the remainder of the former paper mill site be retained for industrial purposes consistent with a General Industry zoning.

The accommodation of new large format retail elsewhere in Burnie is constrained by a comparative scarcity of available, suitably zoned land and the uneconomically high cost of site aggregation. Only six commercial sites sold in Burnie in the decade to 2015 (LIST), and all of these involved parcels with an area of less than 1 000 m², too small for a conventional large format retail offer. In contrast, vacant industrial land was comparatively plentiful, with 41 vacant industrial sites transacted during this period, including 9 with an area in excess of 5 hectares and 10 with an area of between 1 and 5 hectares.

The maximum price which developers are prepared to pay for a development site is a residual sum left over after deducting development costs (including appropriate profit margin) from the anticipated realisation price. The realisation cost is derived by dividing the rental value by an appropriate capitalisation rate. Rental values are in turn calculated as a proportion of turnover. Large format retail is characterised by comparatively lower sales per unit area relative to conventional retail which dictates lower average rental rates. Non-metropolitan locations in turn tend to record lower sales intensities (and hence lower rents) than comparable centres situated within major metropolitan centres.

It could be reasonably assumed that the cost structure associated with aggregating a site from Burnie's existing commercially-zoned land would be well above leading large format retailers' willingness to pay. The attraction of new large format retail to Burnie is unlikely to occur on land other than that repurposed from a low rent use, such as disused industrial land.

Industrial Activity

Issues and Context	Objectives	Strategies	Actions
<p>Burnie has a legacy of uncoordinated, fragmented industrial development that predates the adoption of town planning. The resultant pattern has adverse impacts on supply, function and amenity.</p>	<p>To consolidate industrial uses and development at appropriate locations.</p>	<p>Encourage manufacturing, processing and bulk storage and handling activities to cluster in locations where there is a clear advantage for industry through the availability of large, suitable land sites, proximity to resource or workforce, secure access to available or planned transport and utility infrastructure, an established pattern of industrial use and a reasonable ability to buffer against impact on other land uses.</p>	<p>Investigate the adoption a differential rate structure for non-conforming uses to encourage change of use.</p>
<p>Many industrial sites provide restricted potential for increased utilisation given constraints imposed by factors such as slope, access, servicing capacity, proximity to other land use types, or legacy issues resulting from a former occupation.</p>	<p>To ensure that industrial land supply addresses the specific contemporary industrial site requirements as to area, dimensions, slope, services and location.</p>	<p>To encourage conversion of residual residential uses in Wivenhoe to industrial. Promote transport and storage activities in locations with access to strategic transport infrastructure and main freight corridors including sea and airports, major road junctions and rail yards.</p>	<p>Spot purchase of land ear-marked for change of use.</p>
	<p>To ensure the adequate provision of appropriately located and suitable industrial land.</p>	<p>Limit the conversion of Industrial land to non-employment use to circumstances where the land is not required, is incapable of effective use for employment purposes over the long term, conversion will not adversely affect the overall efficiency of</p>	



Issues and Context	Objectives	Strategies	Actions
<p>The city's manufacturing capacity has contracted in recent years reducing the utilisation of industrial zoned land.</p> <p>Demand for industrial land in Burnie has been modest for an extended period. At current rates of land consumption, estimated at 1 900 m² current stocks of suitable undeveloped industrial land is considered sufficient for beyond the forecast horizon.</p> <p>A substantial industrial use to fill the void left by 2010 paper mill closure has failed to materialise after 6 years. In the interim part of the site has been repurposed to accommodate a Bunnings store and there is current interest in a section adjoining Bunnings to accommodate a mixed use development incorporating additional large format retail.</p>	<p>To attract and retain enterprises that leverages the city's existing skilled labour force and supply chain.</p> <p>To transition obsolete and inappropriate industrial sites to more appropriate alternative uses.</p> <p>To activate the former paper mill site with a use or range of uses that leverages the site's locational advantages, complements surrounding uses and development and generates significant employment.</p>	<p>other employment land in the vicinity, there is a need for conversion and the land is suitable for the proposed alternative use.</p> <p>Protect industrial land from encroachment by sensitive non-industrial uses.</p> <p>Selective and targeted rezoning of obsolete industrial land to more appropriate alternate purposes.</p> <p>Transition Camdale and Cooe industrial land to alternate uses.</p> <p>Seriously entertain proposals to redevelop sections of the site to employment-intensive uses that complement adjoining uses but which are consistent with its industrial purpose and zoning.</p>	<p>Retain the land for industrial purpose in accordance with a General Industry zone.</p>

8. Retail & Commercial Activity

Burnie serves as the major retail and commercial hub for that part of the Cradle Coast region west of Devonport.

Burnie's main focus of retail activity is within a compact and well-defined CBD. A more limited range of characteristically local convenience retail is also located within a limited number of local retail precincts are dispersed across the balance of the urban area. Large format retailing is focused in South Burnie and Cooeee.

8.1 Burnie CBD

Burnie's Central Business District (CBD) is located near the midpoint of the municipality's coastal strip. It is a compact area encompassing around 20 blocks bounded by the Bass Highway to the south, Port of Burnie to the east and Bass Strait waterfront to the north.

The CBD is a regional hub to that part of the Cradle Coast region west of Devonport, serving as a sub-regional retail, recreational and cultural destination and an administrative and commercial hub. A major feature of the western side of the CBD is Burnie's cultural precinct.

In retail terms the CBD functions as a sub-regional centre, anchored by Kmart and Target discount department stores and Coles and Woolworths supermarkets. These existing major supermarkets are somewhat smaller than the format now preferred which restricts the range of merchandise that may be offered.

A comparatively unique characteristic of Burnie relative to many regional centres has been its ability to contain a majority of its retail and commercial activity within the CBD. The exception is larger format retail which has tended to cluster in neighbouring South Burnie and Cooeee on account of the availability of larger sites better suited to accommodating the larger footprint and arterial road exposure required by this retail category.

The built form is predominantly two storeys with a scattering of multi-level buildings providing office accommodation and parking space. Retail and commercial activity is largely focused at ground floor level; there is significant underutilised first floor space in the low rise buildings.

A comparatively high level of retail vacancy, equivalent to approximately 13% of retail floor space was observed. This vacancy was largely concentrated in arcades and peripheral sites around the CBD.

The recently formulated Burnie Town Centre Master Plan presents a programme of initiatives to rejuvenate the CBD, building on its strong existing identity and character. The implementation of the its initiatives is anticipated to enhance the internal connectivity of the CBD and fostering it as a vibrant and active town centre thereby enhancing its attraction as a regional destination for retail and related activities.

Likewise, the relocation of an expanded UTAS Cradle Coast Campus to West Park on the north western edge of the CBD is anticipated to provide significant additional patronage to the CBD, presenting opportunities for food and beverage operators and retailers oriented to the young-adult market.

Notwithstanding the surplus capacity evidenced by vacancy, the existing Central Business District is constrained in its ability to accommodate new larger format retail entrants. It is essentially built out. Site assembly to consolidate a site large enough to accommodate the preferred building footprint of new larger format retail occupants within the CBD is considered neither economic nor

feasible having regard to rent budgets of prospective retail entrants and the potential availability of lower cost alternative sites.

A land use survey by Choice Location Strategists identified approximately 38 610 m² of office space within Burnie CBD (not including shop top office space). Place of employment data from the 2011 census indicates that the City of Burnie had an office workforce³ of approximately 1 850 which is estimated to have increased marginally to around 1 900 in 2016. At an industry average provision 21.9 m² of office space per office worker, this is consistent with demand for approximately 40 500–41 600 m² of office space across the municipality. Existing office accommodation appears sufficient to accommodate this demand.

8.2 Other Retail Precincts

Beyond Burnie CBD retail space is clustered in South Burnie, Cooe, Upper Burnie, Camdale, Wivenhoe and Shorewell Park. The quantum of retail space in South Burnie and Cooe is boosted by a number of larger format/showroom style space accommodating space expansive peripheral sales activity such as car sales, auto accessories and furniture.

8.3 Large Format Retail

Formerly known as bulky goods retailing, large format retailing⁴ includes categories such as automotive parts, accessories, repairs and servicing; camping, outdoor and recreation goods; electric light fittings; pet supplies; floor and window coverings; furniture, bedding, furnishings, fabric, manchester and home wares; household appliances, household electrical goods and home entertainment goods; party supplies, swimming pools, office equipment and supplies; baby and children's play equipment and accessories; hardware and landscape gardening supplies and other items of a bulky nature that require a large area for handling, display or storage; or direct vehicle access to the site of the premises by the public for the purpose of loading goods into a vehicle after purchase or hire.

Examples of large format retailers include Harvey Norman, Bunnings, IKEA, Freedom, Snooze, Beacon Lighting, JB Hi-Fi, OZ Design Furniture, Forty Winks, Fantastic Furniture, Barbeques Galore, Baby Bunting, City Farmers, PETstock and Super Cheap Auto.

Large format retailing has emerged as a separate and well patronised retail category in Australia. Large format retailers tend to cluster in precincts, either within homemaker centres or in out-of-centre developments. Consumers are particularly attracted to the high level of competition among retailers and in particular the opportunity to compare prices and products in the one location on the one shopping trip.

Commensurate with the nature of large format retailing, the premises must have sufficient load access (including semitrailers), accommodate large showroom and storage areas and provide adequate car parking facilities for customers.

Equally important to the retailers is that centres and precincts incorporate the right mix of large retailers which helps to ensure the long-term success of each development.

The 2007 Settlement Strategy recommended that large format retail be directed to the southern end of Burnie CBD and to South Burnie west of Edwards Street. South Burnie is identified as the preferred location for large format retail and the Strategy notes that the clustering of future bulky goods stores into a homemaker centre precinct would be beneficial to consumers, retailers and Council planning.

The Burnie Interim Planning Scheme intends that large format retail be accommodated within the Commercial Zone. Burnie presently has two precincts zoned Commercial located respectively at South Burnie and Cooe. The South Burnie precinct is anchored by the Harvey Norman Centre which in addition to its namesake incorporates a Godfreys, SuperCheap Auto accessories outlet, Petbarn and Spotlight store.

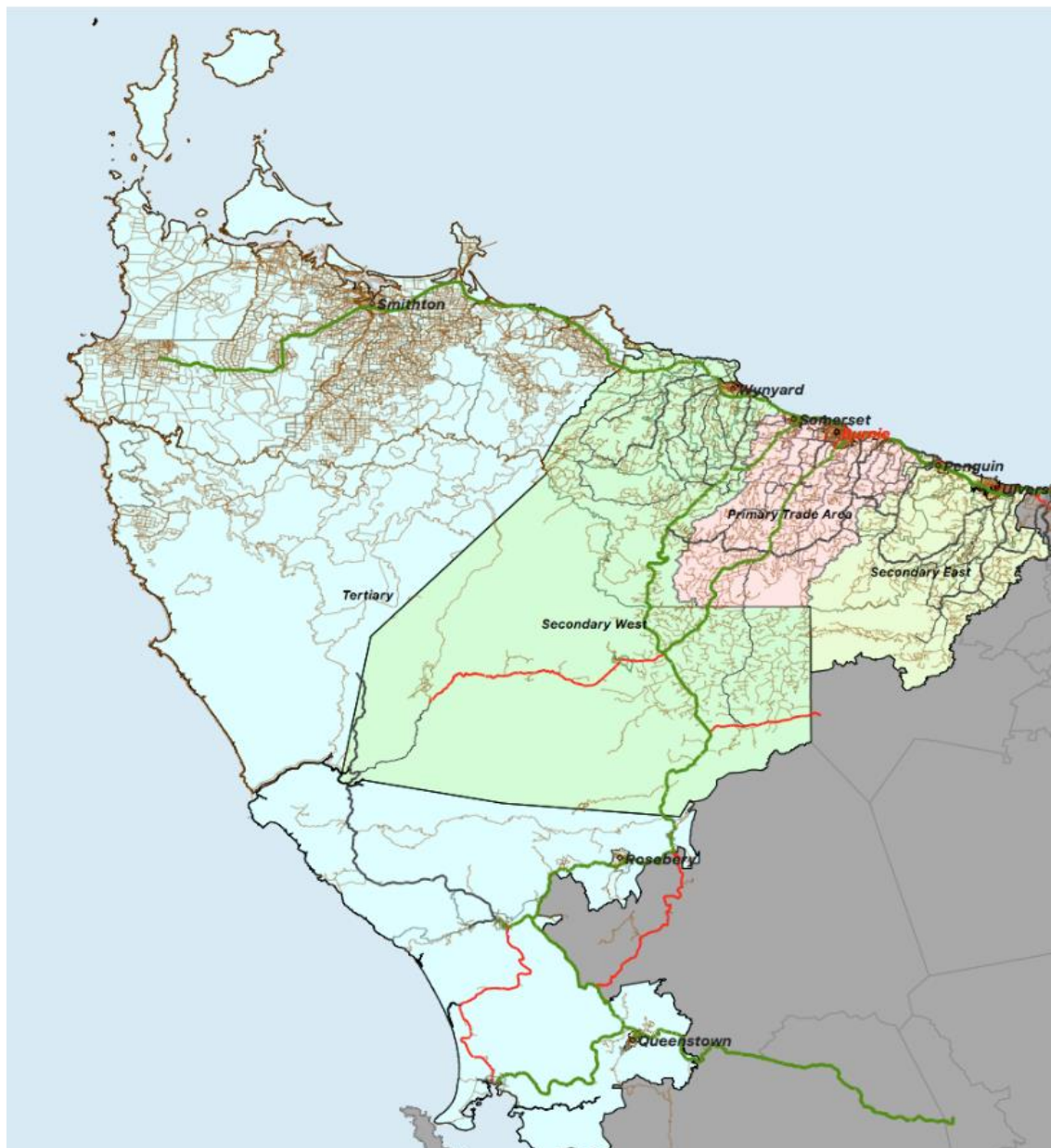
Burnie's existing stock of Commercial zoned land is fragmented and tightly held which potentially impedes new market entrants. Property transaction data compiled from the Land Information System Tasmania (LIST) identified only 6 sales of commercial land within the municipality in the decade to end 2015. All six transactions involved parcels with an area of less than 1 000 m². In contrast, vacant industrial land was comparatively plentiful, with 41 vacant industrial sites transacted during this period, including 9 with an area in excess of 5 hectares and 10 with an area of between 1 and 5 hectares.

A survey of large format national retailers represented in other Australian urban centres of comparable size to Burnie found a comparative under-representation of the category in Burnie, with 6 leading retailers represented compared to a sample average of 8.3.

Burnie's existing large format retailers are predominantly accommodated within the Harvey Norman Centre situated at the corner of Marine Terrace and Edwardes Street. Tenancies include Harvey Norman, Spotlight and Supercheap Auto and Godfreys. The remainder are freestanding stores in the CBD or South Burnie.

In its Draft Report on the Economic Structure and Performance of the Australian Retail Industry (July 2011) the Productivity Commission recommended that Local Governments should significantly reduce prescriptive planning requirements to facilitate new retail formats locating in existing business zones and ensure that competition is not needlessly restricted. It further recommended that State and territory governments should broaden zoning within and surrounding activity centres to facilitate new retail formats locating in existing business zones.

Figure 8.1: Main Trade Area for Burnie's Comparison/Large Format Retailers



Source: Choice Location Strategists

Retail and Commercial Activity

Issues and Context	Objectives	Strategies	Actions
<p>Burnie is a leading retail node in the Cradle Coast region as reflected by it's the depth and diversity of its retail mix, wide catchment area and market penetration.</p> <p>Negligible population growth is constraining new commercial and retail activity and investment.</p> <p>Burnie CBD remains the primary focus for retail, service and cultural activity in the municipality.</p> <p>A lack of capital investment and new retail entrants in recent years has given rise to a somewhat tired and less than compelling retail offer.</p> <p>Underutilisation of CBD retail & commercial space as indicated by comparatively high vacancy.</p> <p>Comparatively high statutory outgoings are cited as a cost impediment to potential new entrants.</p> <p>The Cradle Coast Campus is to be relocated to the north-west edge of the CBD.</p>	<p>To support Burnie's continued role as a regional focus for the provision of business, commercial and community services.</p> <p>To support Burnie's existing economic base and attract new, sustainable employment generators that leverage and complement existing enterprise.</p> <p>To maintain Burnie CBD as the primary focus of retail, service and cultural activity in the municipality.</p> <p>To encourage new retail investment & entrants into the CBD.</p> <p>To leverage retail and service opportunities arising from enhanced patronage associated with the expanded, relocated university campus at West Park.</p>	<p>Develop a Business Attraction strategy.</p> <p>Burnie Town Centre Master Plan.</p> <p>Through the Burnie Interim Planning Scheme restrict the development of retail, commercial and cultural activity outside the confines of the CBD and other existing retail precincts.</p> <p>Encourage greater activation of the northern edge of the CBD through intensification of activity.</p>	<p>Develop a Business Attraction strategy.</p> <p>Implement recommendations of the Burnie Town Centre Master Plan.</p> <p>Undertake a retail needs and gap analysis to identify opportunities for new entrants.</p> <p>Liaise with land and business owners from the northern edge of the CBD to discuss potential opportunities.</p>
<p>A comparatively high incidence of above</p>	<p>To activate underutilised CBD space.</p>	<p>Investigate opportunities to develop</p>	<p>Review the operation of business incubators elsewhere to identify modus</p>



Issues and Context	Objectives	Strategies	Actions
<p>ground level vacancy in the CBD.</p> <p>A number of national homemaker retailers are not presently represented in the Cradle Coast region.</p> <p>Lack of available commercial sites to accommodate new large format entrants. Existing commercial land is tightly held and rarely transacted.</p> <p>The feasibility of consolidating existing commercial land to accommodate new entrants is constrained by high site aggregation costs and retailer's modest rental budgets.</p>		<p>'business incubators'.</p>	<p>operandi, needs and best practice.</p> <p>Liaise with leasing agents to identify potential space.</p>

9. Tourism & Hospitality

According to Tourism Tasmania Burnie attracted 159 375 visitors in the year ending March 2016 representing 13.5% of all visitors to Tasmania during the period and an increase of 4.3% over the previous corresponding year. Of these, 45 845 stayed overnight (up 7.2% and accounting for 3.9% of all overnight stays in the state). While the number of overnight visitors was up, the total number of nights stayed (168 748 or an average 3.68 nights per visitor) eased 6% over the previous year.

Burnie's visitor attractions include a mix of arts and cultural attractions (e.g. museum and art gallery), natural attractions (e.g. walking trails, waterfalls, wildlife), gardens and parks, and factory display shops (e.g. Creative Paper and Cheese Factory).

Burnie's existing visitor accommodation is largely concentrated in the CBD and its immediate environs. It includes eight star-graded establishments with 10 or more rooms with an aggregate of 226 rooms. 200 of these were graded 3-3.5 stars with the remaining 26 classified 4 or 5 star. A comparative lack of 4+ graded accommodation is considered an inhibitor of the City intercepting more overnight stays by affluent visitors. A modest occupancy rate, averaging 48% for the nine quarters to June 2015 may discourage further near term investment in the sector. Nevertheless, the West Park Master Plan envisages the development of a new high-end waterfront hotel within that precinct associated with the relocation of UTAS Cradle Coast campus.

The exhibition/convention space proposed to be developed in Devonport as part of its Living City program is likely to inhibit development of dedicated conference/venue infrastructure within Burnie for the foreseeable future although facilities within the redeveloped UTAS Cradle Coast Campus could address this gap.

Tourism and Hospitality

Issues and Context	Objectives	Strategies	Actions
<p>A comparative lack of 4+ graded accommodation is considered an inhibitor of the City intercepting more overnight stays by affluent visitors.</p>	<p>To provide 'a five-star visitor experience on the edge of adventure'.</p> <p>To increase the supply of 4 or more star accommodation in appropriate locations to attract more overnight stays from business and more affluent visitors.</p>	<p>Tourism product should be located close to visitor amenities and services in locations such as the CBD and the Waterfront;</p> <p>Future tourism development should increase the profile of Burnie as a tourism destination and address market gaps, particularly in the 4 star plus sector.</p> <p>High-capacity visitor accommodation should be located in major settlement centres and key tourist locations.</p> <p>Existing operators should be encouraged to reinvest in their properties and upgrade the accommodation standard;</p>	<p>Provision of 4+ accommodation is proposed as part of the West Park campus development and should be encouraged.</p>
<p>Modest occupancy rates for existing visitor accommodation may inhibit further near-term investment in the sector.</p>	<p>To boost occupancy of existing accommodation by promoting Burnie as an overnight destination.</p> <p>To maintain and grow the number of cruise visits to the Port of Burnie.</p>	<p>Tourism product should promote the natural assets of the region in locations such as Cooee Point and the Waterfront.</p> <p>Improve port arrival amenities.</p> <p>Maintain the current high standard of visitor reception.</p> <p>Maintain transport infrastructure to facilitate visitor movements, and this should be considered in any local transport plan.</p>	<p>Consider visitors' requirements in Regional Transport Plans.</p>

10. Transport Infrastructure

With its port and airport, Burnie serves as gateway to Tasmania's North West. Burnie is Tasmania's largest port, handling over 4 million tonnes of freight, including the largest container volumes at 54 per cent of total TEU (Integrated Freight Strategy). It is Tasmania's leading container port, moving 242 136 TEU in 2013-14.

Container freight services are provided under long-term lease arrangements at Burnie Port by Toll-ANL (market share around 55 per cent). Toll has announced plans to replace its existing Bass Strait vessels, increasing capacity.

The Freight Logistics Coordination Team identified the Port of Burnie as the preferred location for long-term consolidation of Tasmania's domestic container task, based on potential for deep water expansion, ability to develop at comparatively lower cost and alignment with land transport networks.

The port services Tasmania's major west coast mines and handles most kinds of bulk shipping including, minerals, fuels, woodchips and logs, as well as containerised consumables. The export of forest products is an important operation of the port.

The Port of Burnie accommodates Tasmania's only minerals concentrate ship loader. Owned by TasRail, and including a loader, wagon tippler, conveyance system and storage shed, the ship loader handles up to 500 000 tonnes of mineral concentrates a year. It primarily serves bulk mineral customers from the West Coast. Considered a critical part of mining supply chains, it is recognised as approaching the end of its functional life and requiring replacement over the short-term.

The \$12 million Burnie Port Optimisation Project was recently completed ending train shunting along the Burnie Waterfront in January 2016. The collaboration between the Australian and Tasmanian governments, Toll Group, TasPorts and TasRail delivered a modern, efficient, safe and expanded rail terminal, complete with a new hardstand and freight storage facilities. The project has also reduced vehicle congestion and vastly improves train handling, loading/unloading activities. It is estimated that long-term, staged upgrades can accommodate 750 000 TEU, which would meet Tasmania's total container demand for the next thirty years.

The Port of Burnie is considered to have adequate land for its near term (next 15 years) requirements through reconfiguration and small-scale reclamation (Integrated Freight Strategy). On-going reclamation has progressively expanded available foreshore land for port-related uses.

A Master Plan for the Port of Burnie is being drafted by Black Quay Maritime Consulting for anticipated completion in June. It is foreseeable that additional land within a 5-10 kilometre radius may be required for bulk storage.

Burnie's highway and rail network connect the city to the region and balance of the state. Tasmania has an extensive road and rail freight network, with all major freight corridors operating as parallel road and rail networks. The Burnie to Hobart freight corridor is the state's most significant freight corridor, carrying the highest; 65% of all freight journeys travel on this corridor (Integrated Freight Strategy). It is Tasmania's key corridor for the movement of containerised freight (AusLink 2007). Tasmania's road network carries the highest freight volumes – 20.3 million tonnes compared to 2.3 million tonnes on rail (2011-12).

In the absence of high frequency public transport Tasmanians rely heavily on private cars to meet their transport needs. Burnie serves as a key regional employment destination within the Cradle

Coast Region accounting for 24.6% of all jobs. Journey to work data from the 2011 census found that 43.6% of people who worked in Burnie lived outside the municipality generating significant traffic flows as over 90% of workers travelling to Burnie make the journey by car. The main source municipalities of origin for non-resident Burnie workers were Waratah/Wynyard (main town Wynyard) to the immediate west (21.3%) and Central Coast to the immediate east (16.3%; main town Ulverstone).

Bass Highway alongside the coastal strip carries significant traffic accommodating both regional and local traffic. This dual function, carrying both arterial traffic and local traffic introduces friction into the road network as local traffic accesses and leaves the highway. While this is not optimal, bypass options from around 20 years ago are no longer being considered and with changed land prices would not be affordable.

The Integrated Transport Plan identifies this section of the Bass Highway as a narrow strip with high volume traffic serving local and state functions, but does not propose changes.

Transport Infrastructure

Issues and Context	Objectives	Strategies	Actions
<p>Burnie serves as gateway to Tasmania's North West.</p> <p>The Port of Burnie is Tasmania's largest port.</p> <p>A decline in passenger volumes through Burnie Airport: attracting 70 402 revenue passengers in fiscal 2010-11, Burnie Airport was ranked 49th in Australia. Passenger numbers peaked at 95 275 in 2007-08. The lack of a major carrier servicing the airport and the use of smaller aeroplanes is perceived as an inhibiting factor.</p> <p>AusLink identified the 48 hour turnaround time between Hobart and Burnie and the limited load capacity as the most significant factors inhibiting rail's ability to increase freight market share between Hobart and the northern ports.</p>	<p>To maintain effective, efficient & integrated transport linkages the connect Burnie with the state, region and world.</p> <p>To support and facilitate the effective operations of the port.</p> <p>To locate port-related uses at the Port of Burnie.</p> <p>To allow for the effective development and operation of transport and related services;</p> <p>To promote Burnie Airport as a regional gateway.</p> <p>To improve rail turnaround time and load capability.</p>	<p>The Integrated Transport Plan</p> <p>The Burnie Interim Planning Scheme assigns the Port and Marine zone to the port and restricts the range of permissible uses to transport and storage-related uses to the exclusion of manufacturing and processing.</p> <p>Attract a low-cost air carrier to Burnie Airport.</p>	<p>Liaise with low cost air carriers to explore options to attract the business to Burnie Airport.</p>

11. Community Infrastructure

11.1 Overview

Community Infrastructure includes the following:

- Educational facilities
- Health Services and facilities
- Cultural and arts facilities and venues
- Community centres and halls
- Child care services
- Open Space; and
- Sport and recreational facilities

Burnie is well endowed with cultural and recreational infrastructure, including a well- established civic precinct. The civic precinct encompasses the City's Town Hall, theatres, function rooms, gallery buildings, Pioneer Village Museum, Information Centre, regional library and Senior Citizens Centre.

Table 11.1: Burnie Population within Selected Age Cohorts and Educational Institutions attended – actual and forecast

	1991	1996	2001	2006	2011	2016	2021	2026
Aged 0-4 years	1 683	1 494	1 310	1 221	1 257	1 288	1 276	1 268
Aged 5-14 years	3 432	3 060	2 751	2 832	2 597	2 466	2 327	2 191
Aged 15-24 years	3 296	2 793	2 472	2 451	2 663	2 871	2 604	2 389
Market Share of Age Group								
Pre-school (0-4 years)	13.5%	11.0%	11.1%	10.6%	11.1%	11.0%	11.5%	12.0%
Infants/Primary (5-14 years)	64.9%	67.5%	69.9%	67.7%	67.7%	67.7%	67.7%	67.7%
Secondary (5-19 year olds)	28.1%	31.1%	29.0%	28.2%	29.1%	29.1%	29.1%	29.1%
Technical or Further Educational (15-24 years)	20.1%	25.3%	27.5%	25.9%	25.0%	25.0%	25.0%	25.0%
University or other tertiary (15-24 years)	6.8%	6.4%	9.7%	11.3%	14.7%	16.0%	18.1%	20.1%
Other Education type (15-24 years)	3.5%	3.2%	3.4%	2.7%	3.8%	3.3%	3.3%	3.3%
Numbers Attending								
Pre-school	227	165	145	129	139	142	147	152
Infants/Primary:	2 226	2 067	1 924	1 917	1 758	1 669	1 575	1 483
Secondary:	1 444	1 422	1 204	1 178	1 175	1 131	1 057	1 024
Technical or Further Educational Institution(a):	661	707	681	634	667	719	652	598
University or other tertiary Institution:	225	180	240	277	392	459	470	481
Other Educ'n Institution:	114	90	85	66	100	96	87	80

Sources: Australian Bureau of Statistics 1991-2011 censuses, Choice Location Strategists

The Burnie Interim Planning Scheme zones 96 hectares for Community Purposes in seven discrete locations. This land is intended to provide for education, health and aged care that cannot be integrated within an alternate zone. The zoned land accommodates school and higher education campuses and medical facilities. A number of schools are situated on General Residential zoned land.

11.2 Education

Table 12.1 presents numbers of people by age cohorts typically represented in the education sector and quantifies actual and forecast numbers of Burnie residents attending educational institutions. The forecasts are based on the trend (medium) population growth assuming the market share listed below.

The two decades to 2011 was characterised by a marked contraction in the number of infants and children attending school in Burnie in line with a contraction in numbers in the number of school-aged children. The count of children attending pre-school fell 39% from 227 in 1991 to 139 in 2011. Primary school attendees fell 21% from 2 226 to 1 758 over the corresponding period and secondary school attendee numbers dropped 19% from 1 444 to 1 175.

Within the sector Catholic schools recorded enrolment growth over the 15 years to 2011, with primary school enrolments rising 11.4% to 352 and secondary school enrolments increasing 0.9% to 339.

In contrast to school education, the number of Burnie residents attending higher education increased in the two decades to 2011. The growth was most pronounced among universities and other tertiary institutions with enrolments increasing 74.2% to 392 over the period.

Whereas primary schools predominantly draw residents from a localised catchment, independent secondary and higher education institutions draw from a broader regional catchment and the ranks of Burnie residents at Burnie's higher education facilities are supplemented by students drawn from the wider Cradle Coast region. The 2011 census enumerated 1 505 residents of the Cradle Coast region attending university or another tertiary institution, a 49.8% increase over the previous decade. This was marginally offset by a reduction in regional enrolments at technical and further education institutions over the corresponding period, falling 7.4% to 3 078.

Looking forward to 2026, age specific population projections for Burnie forecast a further contraction in infant and school-aged children numbers over the decade to 2026. The number of children aged 0-4 is projected to drop a modest 1.6% to 1 268, while the fall in numbers of children aged between 5 and 14 years and teenagers and young adults aged between 15 and 24 years is anticipated to be more pronounced: 11.2% and 16.8% respectively.

A modest increase in the proportion of 0-4 year olds attending pre-school is anticipated to offset the decline in numbers in this age cohort, giving rise to a marginal increase (+5) in enrolments to 2026. Enrolments in primary and secondary schools are projected to decline marginally. The projections indicate that negligible change to the capacity of Burnie's existing pre-school and school education campuses is likely to be required for the foreseeable future.

11.3 Health Care

The Burnie campus of the North West Regional Hospital is situated at 23 Brickport Road. Operated by the Tasmanian Health Service, it has 160 bed capacity providing health care and specialist services to North West Tasmania and King Island. The hospital caters for the emergency resuscitation, surgery and intensive care of most trauma patients and other medical conditions.

The neighbouring North West Private Hospital at 21 Brickport Road is a 48 bed acute medical, surgical, psychiatric and obstetric hospital owned and operated by Health Care Australia Pty Ltd.

Community Infrastructure

Issues and Context	Objectives	Strategies	Actions
<p>Burnie is well endowed with cultural and recreational infrastructure. 96 hectares is zoned for Community Purposes in the Burnie Interim Planning Scheme.</p>	<p>Sufficient provision of land for emerging community purpose needs.</p>	<p>Zoning of land for Community Purposes in the Burnie Interim Planning Scheme.</p>	
<p>The Civic Precinct is reliant on financial subsidies from Council to address a revenue shortfall.</p>	<p>To improve the financial self-sufficiency of the facility through use maximisation.</p>	<p>Review the operation, fee structure and management of Burnie Civic Precinct assets.</p>	<p>Review the fee structure.</p> <p>Intensify the café and hospitality operations.</p> <p>Consolidate other community groups to the centre.</p> <p>Improved brand awareness and marketing.</p> <p>Establish a public-private partnership with outsourced venue management rights.</p>
<p>The region's ageing population is anticipated to increase demand for health services.</p>	<p>To increase the capacity of the North West Regional Hospital to address the additional demand created by an ageing population.</p> <p>Adequate provision for independent and assisted living units.</p>		
<p>A contraction trend in school enrolments associated with a decline in the number of school aged children is anticipated to continue, albeit it modestly, over the forecast horizon.</p>	<p>To provide sufficient school capacity to accommodate forecast near and intermediate term enrolments.</p>	<p>Maintain and consolidate existing school infrastructure.</p>	
<p>A modest increase in pre-school</p>			



Issues and Context	Objectives	Strategies	Actions
<p>enrolments is anticipated on the back of higher attendance rates.</p> <p>Catholic school enrolments are defying this trend and have trended upwards over the last decade.</p> <p>Burnie serves as a regional destination for tertiary education. Strong trend growth in the regional university enrolments is anticipated to give rise to capacity constraints which will be addressed by the proposed expansion and redevelopment of the UTAS Cradle Coast campus, discussed in the following sub-section.</p> <p>The relocation of the Cradle Coast Campus of UTAS to West Park by the first semester of 2018 will free up the existing campus building for alternate uses.</p>	<p>To deliver adequate capacity to accommodate forecast growth in tertiary education enrolments.</p> <p>To ensure the adequate provision of open space.</p>	<p>Redevelopment of the UTAS Cradle Coast Campus at West Park.</p> <p>Plan for a network of open space within and between settlements should cater for recreation, nature conservation and social needs.</p>	<p>Assess alternative uses for the existing Cradle Coast campus.</p> <p>Burnie Open Space Plan</p>

12. Environmental & Natural Resource Challenges

Burnie contains a wealth of natural features, resources and landscapes that have underpinned and sustained the city's economic and population growth since settlement. The region is made up of a diverse range of landscape elements including coastal plains, escarpments, rivers and a natural coastline. The comparatively flatter coastal landscapes have long been the areas most sought after for settlement giving rise to land use competition.

Burnie and its hinterland are rich in natural resources including fisheries, timber, ground water, mineral resources and productive soils. These resources are foundational to its local and regional economy and require careful stewardship. State planning policy recognises farmland as a key natural resource to be protected from development pressures in order to sustain primary production into the future.

An extensive area of the municipality - 8 861 hectares is designated as Permanent Timber Production Zone, managed by Forestry Tasmania pursuant to the Forest Management Act 2013. The land is certified under the Australian Forestry Standard.

Table 12.1: Public Reserves by Category

Category	Number	Area (ha)
Permanent Timber Production Zone Land	16	8 861.1
Regional Reserve	3	3 285.4
Conservation Area	7	1 521.2
Public Reserve	50	198.6
Grand Total	76	13 866.2

Source: LIST

Areas of high environmental significance and value are recognised through the reservation of land in national parks, wilderness and other conservation reserves. Coastal wetlands are protected under State Government environmental planning policies. Conservation reserves are declared under the Nature Conservation Act 2002 that sets out the values and purposes of each reserve class and managed under the National Parks and Reserves Management Act 2002 according to management objectives for each class.

Some 3 285 hectares is categorised as regional reserve across three regional reserves: Emu River, Old Park and Laurel Creek.

Council has acquired key sites adjacent to Bass Strait to strengthen recognition of Burnie's scenic setting and presentation of Burnie as a 'high quality living environment'. Sites include Cooee Point and Camdale Point.

There are four private reserves in Burnie designated by conservation covenant pursuant to the Nature Conservation Act with an aggregate area of 1 060 hectares. One 1 027- hectare reserve on the southern boundary of the municipality accounted for 97% of this area. The remaining three averaged 11 hectares each.

Environmental & Natural Resource Challenges

Issues and Context	Objectives	Strategies	Actions
Burnie and its hinterland are rich in natural resources including fisheries, timber, ground water, mineral resources and productive soils. These resources are foundational to its local and regional economy and require careful stewardship.	<p>To Improve the quality of the environment and avoiding detrimental environmental impact;</p> <p>To provide development that is responsive to natural, landscape and scenic values;</p> <p>To protect, maintain and improve our natural attributes and resources;</p> <p>To enhance environmental values compatible with environmental constraints;</p> <p>The efficient use of all environmental and land resources; To protect against the impacts of natural hazards;</p> <p>To support the maintenance and enhancement of our biodiversity;</p> <p>To manage and protect our scarce water resources;</p>	<p>Restrict development on land with conservation value or which has heritage, environmental or cultural significance.</p> <p>Areas of high environmental significance and value are recognised through the reservation of land in national parks, wilderness and other conservation reserves.</p> <p>Coastal wetlands are protected under State Government environmental planning policies. Conservation reserves are declared under the Nature Conservation Act 2002 that sets out the values and purposes of each reserve class and managed under the National Parks and Reserves Management Act 2002 according to management objectives for each class.</p> <p>Exclude from development land that is unsuitable due to any environmental hazard or sensitivity unless the risk has been assessed as minor pursuant to the Tasmanian Natural Hazards Land Use Planning Guidelines or adequate provision is made for the control of that hazard;</p> <p>Code E1 in the Burnie Interim Planning Scheme to manage bushfire risk.</p> <p>Code E6 in BIPS applies for landslide and other hazards to require investigation and appropriate management to provide a</p>	<p>Application of zoning and overlays under the Burnie Interim Planning Scheme.</p> <p>Limited additional action required as 3285 hectares is already categorised as regional reserve across three regional reserves: Emu River, Old Park and Laurel Creek.</p> <p>Selective acquisition of key sites of adjacent to Bass Strait to strengthen recognition of Burnie's scenic setting and presentation of Burnie as a 'high quality living environment'. Sites include Cooe Point and Camdale Point.</p>



Issues and Context	Objectives	Strategies	Actions
	To respond to the challenges of climate change.	tolerable level of risk.	

13. Primary Production

There is a scarcity value to land unconstrained by environmental considerations. The planning imperative is to ensure that this land is utilised to its greatest advantage. The *State Protection of Agricultural Land Policy* requires that prime agricultural land is zoned for agricultural use and that development on adjacent land not compromise agricultural use. This includes consideration of the density and proximity of any adjacent development and the width, nature and management of any buffer areas provided.

537 square kilometres (representing 87.9% of the municipality) is zoned Rural Resource.

The ABS Mesh Block count identifies 20 471 hectares of land (33.5% of the municipal area) which is predominantly used for agricultural purposes concentrated in the localities of Highclere, Natone, Ridgley, Upper Natone, Romaine, Stowport and East Cam in the municipality's interior. Based on ten years of transaction data published by the LIST, grazing and pastoral land dominated, accounting for 61% of sales followed by dairying (22%) and mixed use (17%).

The typical size of holding transacted was not large. A majority of the transactions (56%) involved parcels comprising areas of between 10 and 40 hectares, a further 29% involved parcels of between 40 and 100 hectares while only 12% involved areas greater than 100 hectares.

13.1 Strategic Principles

- Primary production is recognised as the priority purpose of rural land and use or development that does not have a need or reason to be located on rural land or which is likely to interfere or conflict with rural resource use is to be limited.
- Uses or development that is directly associated with and subservient to rural resource uses is to be facilitated.
- Limit change of use to non-agricultural purposes land assessed as having high agricultural capability.



choice location
S T R A T E G I S T S