



Population Change in Northern Tasmania: Insights and Opportunities

A discussion paper for the
Northern Tasmania Development Corporation

Prepared by the
Tasmanian Policy Exchange at the
University of Tasmania

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Acknowledgment of Country

The University of Tasmania pays its respects to elders past and present, and to the Tasmanian Aboriginal community that continues to care for Country. We acknowledge the profound effect of colonial settlement on this Country and seek to work alongside Tasmanian Aboriginal communities, respecting their deep wisdom and knowledge as we do so. The palawa/pakana belong to one of the world's oldest living cultures, continually resident on this Country for 42,000 years.*

We acknowledge this history with deep respect, along with the associated wisdom, traditions, and complex cultural and political activities and practices that continue to the present.

The University of Tasmania also recognises a history of truth that acknowledges the impacts of invasion and colonisation upon Aboriginal people and their lands, resulting in forcible removal, and profound consequences for the livelihoods of generations since. The University of Tasmania stands for a future that profoundly respects and acknowledges Aboriginal perspectives, culture, language and history, and continued efforts to realise Aboriginal justice and rights, paving the way for a strong future.

* Members of the Tasmanian Aboriginal community identify with a range of terms, including palawa, pakana, Pallawah, Aboriginal, Aborigine, Indigenous, Traditional Owners, First Nations, and First Peoples. In this report, we use the term Tasmanian Aboriginal people and communities, while recognising that there are several other ways Tasmanian Aboriginal people may choose to refer to themselves.

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The views expressed herein are those of the authors and not necessarily the views of the University of Tasmania nor the Northern Tasmania Development Corporation.

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[Tasmanian greenhouse gas emissions update \(June 2024\)](#)

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Executive Summary

Population growth and patterns of settlement are among the most important determinants of prosperity, wellbeing, and the character of communities. As a result, the ways that populations change over time – not merely in size but also age structure, health, wealth, mobility, and various other factors – are crucial considerations across a range of issues from infrastructure planning to healthcare and housing. Understanding and planning for population change is essential to pretty much everything else governments do.

In 2019, the Northern Tasmania Development Corporation (NTDC) developed its first regional population strategy for Northern Tasmania. This strategy gathered evidence about how the region's population was changing and set ambitious goals for its future growth and distribution. What this strategy could not have foreseen, of course, was the single biggest demographic and economic disruption in generations: the COVID-19 pandemic. It is difficult to overstate the impacts of COVID-19 on economic activity and the movement of people in the two to three years following NTDC's 2019 strategy. With the pandemic's short-term effects behind us, however, it is now possible to make a fresh assessment of how Northern Tasmania's population has been changing over the past decade, how (and indeed if) the COVID-19 crisis had a meaningful long-term impact, and what the future may have in store.

This discussion paper was prepared for a workshop convened by NTDC and the TPE in Launceston on October 29th, 2024. It is designed to provide a robust evidence base to inform and support the development of NTDC's next population strategy. Its aim is to go beyond the headline data to examine underlying drivers of population change at both a regional and LGA level in Northern Tasmania. The data and analysis will enable NTDC, its member councils, and other partners to better plan for the needs of Northern Tasmania's residents now and in the future by ensuring that infrastructure and service provision are tailored to key population growth and distribution trends.

Post-COVID trends in regional population

The COVID-19 pandemic was undoubtedly a transformative event, but its effects seem to have accelerated trends that were already underway rather than fundamentally reshaping them. Existing research into these trends, summarised in Part 1, highlights a few key themes relevant to Northern Tasmania:

- **Employment:** The ability to find meaningful and well-paying employment is an enabler of migration, but it is usually not the reason people move. Research on the motivations of internal migrants in Australia demonstrates that lifestyle, amenity, liveability, and access to nature are the crucial determinants of relocation decision making for most people.
- **Remote work** does not appear to have fundamentally reshaped internal migration. In the pandemic's immediate aftermath, many assumed that remote working arrangements would drive an exodus from big cities to regional areas, but this has not occurred. Instead, it seems that a combination of hybrid work and expensive housing has driven young people to the peri-urban fringe and 'satellite' hinterland communities.
- Much **internal migration** in Australia follows a 'stepping stone' pattern. Overseas migration, dominated by young people, is predominantly to larger cities and metro areas (including Launceston). Migration from city centres to the urban fringe is dominated by working people in their late 20s and 30s, many with young children. Migration to regional and rural areas is driven by older retirees and sea changers.

The changing population of Northern Tasmania

Drawing on national research, Parts 2 and 3 turn to analysing how population change has played out in Northern Tasmania at both a regional and LGA level.

This part of the paper shows that, since 2019, Northern Tasmania's has experienced:

- **Solid overall population growth of 4.3%**, which while below the state average is higher than in comparable regions elsewhere in the country, as well as heartening growth among younger working-age adults (25–44-year-olds).
- **Strong net overseas migration into Launceston** as well as interstate migration of older people to the East Coast. The past two years have seen net-negative internal migration (-900 people in the two years since July 2021), meaning that without overseas migration, Northern Tasmania's population would have declined. Since 2019, net overseas migration has contributed around 3000 people to the region's population.
- **Outward migration of young families to the urban fringe**. This has driven very strong population growth and a falling median age in communities like Westbury (+10.6%) and Legana (+10.1%).
- **Acute structural aging in regional communities** driven by internal migration of older people and natural aging of the existing population. Areas of Break O'Day, Dorset, and Flinders are at risk of rapid 'hyper-ageing', with clear implications for service provision and infrastructure planning.

These dynamics pose serious challenges but also present considerable opportunities and clearly highlight the need for an ambitious, long-term regional population strategy.

Based on this report's analysis, Northern Tasmania's next population strategy should focus squarely on the following four key themes:

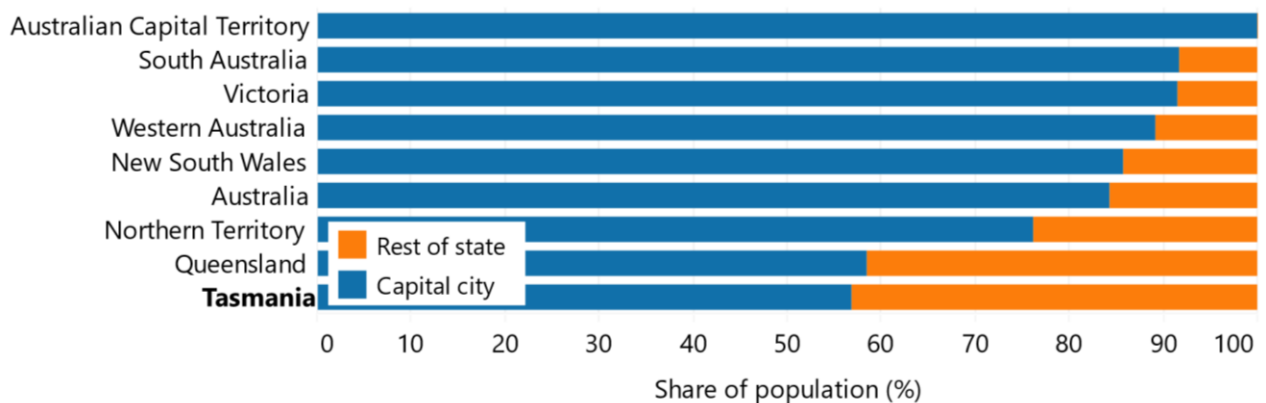
1. **Retention of international migrants.** Northern Tasmania actually performs better than comparable regions in the retention of international students, but worse for skilled migrants. Improving retention rates in both cohorts by even small amount would have a significant, positive impact over time on the region's population.
2. **The geographical distribution of structural ageing.** Over the past decade, the population of Northern Tasmania has continued to get older and, in some areas, the rate of population ageing has increased. Influencing the pace of this ageing where it is possible to do so, and preparing for it where it is not, will be essential to future service provision in remote and regional parts of Northern Tasmania.
3. **Infrastructure and service provision for young families.** NTDC, state government, and the councils surrounding Launceston must engage in a coordinated effort to provide the infrastructure and services to support population growth on the Launceston's outskirts.
4. **The impacts of population churn.** A manageable level of population turnover is no bad thing, but our analysis shows that people leaving Northern Tasmania typically are younger, healthier, more likely to be engaged in employment or education/training, earn more, and work in more highly skilled occupations. This raises the possibility that churn is contributing to population ageing, 'brain drain', and a growing health and social care service delivery gap.

1 Setting the scene: Our changing population

Australia's economy and society have undergone enormous changes in recent decades, with profound implications for the size and distribution of the nation's population. With major challenges looming on the horizon – [including slower economic growth, structural population ageing, climate change, declining fertility, and increasing unmet demand for health and social care services](#) – a clear-eyed understanding of Australia's changing population is perhaps more important to our future prosperity and wellbeing than ever.

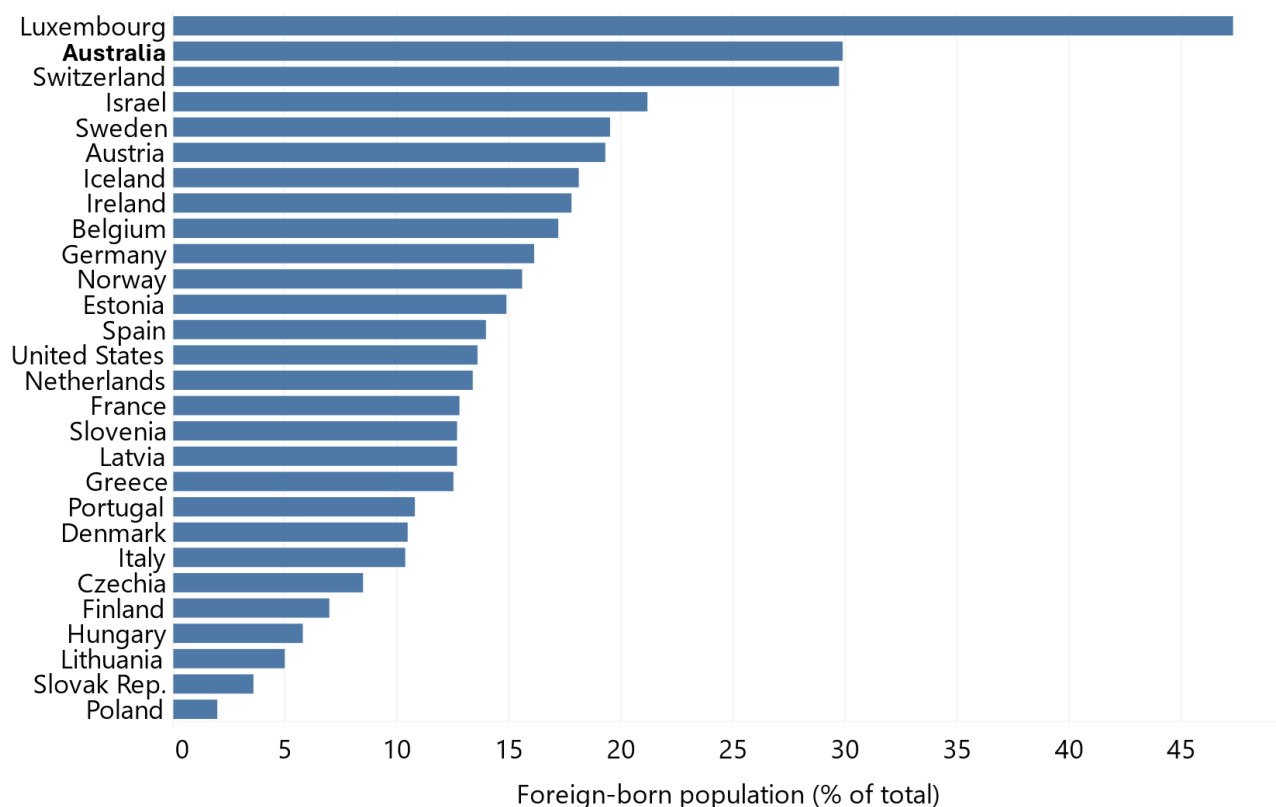
Between now and 2071, Australia's population is projected to grow by anywhere from 34.3 to 45.9 million people. This growth will not be distributed evenly, however: across the country, approximately 85% of projected growth will likely be in the nation's capital cities. The [remaining 15% of this growth will be dispersed across large and small regional cities, country towns, hinterlands and coastal 'lifestyle' regions, and rural or remote areas](#). While some parts of non-metropolitan Australia will experience and benefit from population growth, others will see their populations remain static or even decline.

Figure 1: Geographical distribution of projected population growth (greater capital city area and rest of state), medium series, 2023-2071. Source: Australian Bureau of Statistics (ABS).



Australia's total fertility rate has been below replacement level since the mid-1970s, which means that population growth since that time has been driven by increasing life expectancy, falling mortality and, most importantly, international migration. According to the [2023 Australian Population Statement](#), around 81% of Australian population growth today is attributable to international migration. Given that fertility is forecast either to remain stable or to decline even further in the coming decades, migration will remain the key determinant of population change nationally and in Tasmania for the foreseeable future.

Figure 2: Foreign-born residents as a share of total population, OECD countries, 2019.
Source: ABS.



Given the impact of population change on economic growth, employment, housing, the environment, and wellbeing, it is essential to understand the not only the dynamics that drive population growth, but also its geographical distribution. Though closely related, national population growth and population distribution (in other words, population growth or decline at the sub-national level) are subject to distinct dynamics.

1.1 Key insights from the academic literature on internal migration and settlement

In addition to being a large net beneficiary of the international movement of people, Australians are among the world’s most mobile populations internally. Every five years, more than 40% of Australians change their place of residence (around double the global average and a higher share than in any country for which comparable data are available except the United States, South Korea, and New Zealand). Australians’ frequency of movement (‘migration intensity’) has been declining in recent years, but it remains the case that levels of international migration and patterns of internal migration are the key drivers of regional population change in Australia and Tasmania. Research on migration to – and patterns of settlement within – regional communities has identified several factors that help explain why people move to some places and not others, and what induces them to stay or go. The COVID-19 pandemic caused massive disruptions to both internal and overseas migration, but it’s long-run impacts appear mostly to have accelerated existing trends.

The list below summarises five key findings of national research on internal migration. In subsequent parts, these key trends are used to guide analysis of migration to and from Northern Tasmania, helping to reveal where and how the region’s migration dynamics conform with national trends and where they are distinctive.

- 1. It's not just about employment.** Internal migration flows in Australia typically favour regions with [strong labour markets and low unemployment](#). This has led some observers to believe that employment opportunity is a key driver of internal migration decisions, but this conclusion is not supported by empirical research. Rather, migrants typically nominate [lifestyle, amenity and access to the natural environment](#) as the decisive considerations underlying their migration decisions. Nevertheless, the ability to find employment in a potential destination will, in many cases, determine whether or not a move is actually practical. For this reason, employment is better understood as a [necessary but not sufficient condition](#) for internal migration rather than as a driver or motivation in itself.
- 2. The ability to work remotely is probably not a gamechanger.** Digitisation and social change (particularly following the COVID-19 crisis) have continued to expand the possibility of remote work in many industries. As a result, much has been made of the influence on migration dynamics of so-called 'digital nomads' who can work 'city jobs' from anywhere in the country or even around the world. While this may yet shape migrants' relocation decisions in future as technology and workplace flexibility continue to improve, [evidence does not yet support the conclusion that remote work is a decisive factor](#). Nevertheless, it is likely that hybrid working arrangements, combined with soaring housing costs, are contributing to movement from inner cities to peri-urban areas and regional 'satellite' communities.
- 3. The COVID-19 pandemic accelerated existing trends.** Lockdowns and movement restrictions imposed during the COVID-19 crisis had an unprecedented impact on both internal movement and international migration. Rather than fundamentally reshaping existing migration dynamics, however, [the pandemic seems for the most part to have accelerated trends that were already underway](#). The most important pandemic influence was a large increase in net internal migration to regional Australia. [Subsequent research has shown](#) that this was driven by retention rather than inward migration (i.e., by fewer people leaving regional areas rather than more people arriving). The second key impact was a pronounced though short-term change in reasons for migrating.
- 4. Overseas migration to cities, internal migration to regions.** The relationships between international and internal migration in Australia tend to follow a fairly consistent geographical pattern: international migrants are younger on average and are drawn to major cities, while internal migrants are older on average and are drawn from major cities to regional areas. This is consistent with research on reasons for internal migration (i.e., sea/tree-change migration motivated by lifestyle and amenity considerations).
- 5. Decreasing migration intensity is likely related to behavioural factors, not necessarily economic or employment ones.** Although we still move more often than almost any other nation, 'migration intensity' in Australia is in decline. This is consistent with most other developed countries around the world: rather than becoming more mobile, residents in rich countries are moving less and less frequently. [Research investigating why this is the case has identified behavioural factors as the likely cause](#). More specifically, some researchers have posited that declining migration intensity may be linked at least in part to [growing place attachment](#). High housing prices and transaction/relocation costs may also be a contributing factor.

1.2 The national policy context

Population policy at the Commonwealth level is largely guided by four fundamental objectives:

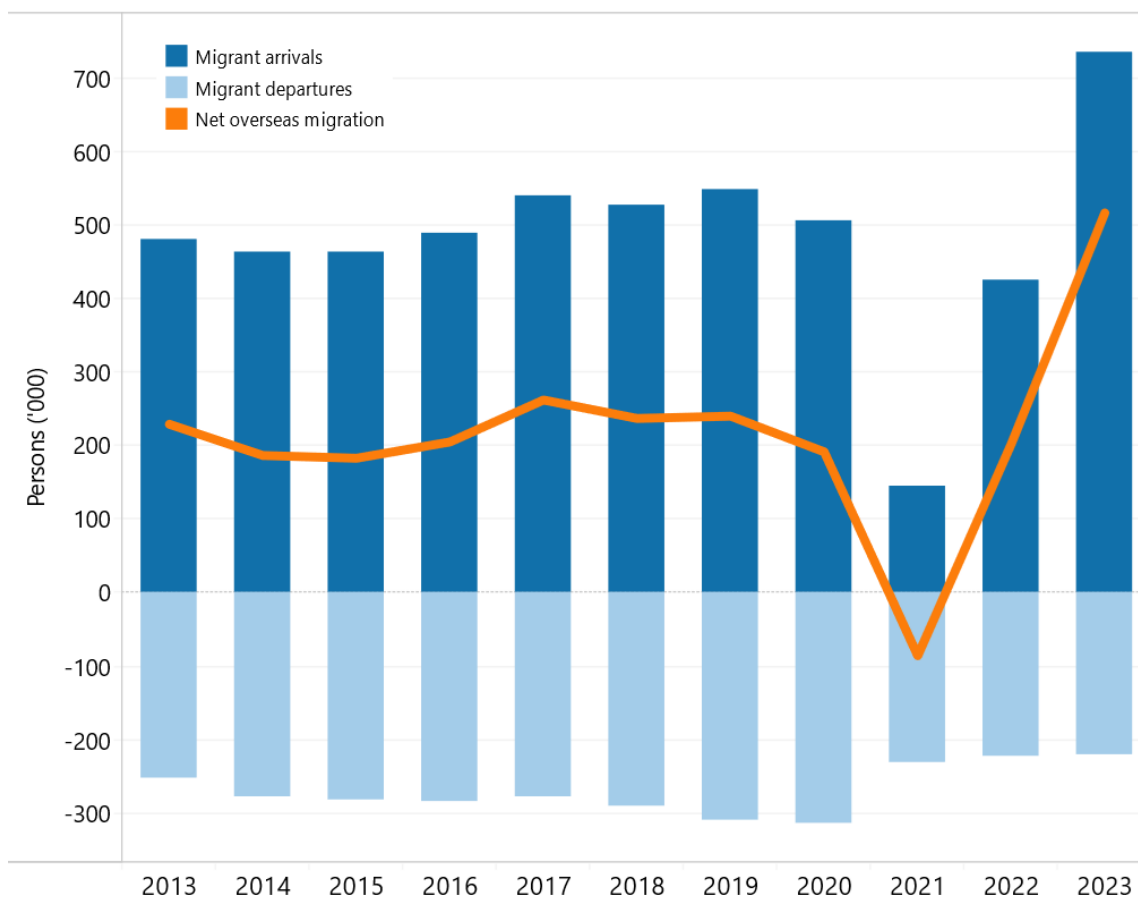
1. Counteract structural population ageing
2. Increase employment and economic growth
3. Meet current and future labour market demand
4. Manage the geographical distribution of people throughout the country

Given that Australia's total fertility rate (TFR) and internal migration intensity both continue to decline, immigration plays a pivotal role in all four. For this reason, understanding the level at which net overseas migration is set and the conditions under which migrants come to Australia are essential to the design of population strategy at the national, state, regional, and local levels alike.

Migrants can gain temporary or permanent entry to Australia through many different pathways and types of visas. The system is complex, with separate classes and sub-classes for visitors, education and training, families and partners, short- and long-term workers, and in-demand skills (see Appendix A for current allocations under different visa types).

The planning levels for migration under the 2024-2025 permanent Migration Program will be set at 185,000 places. The Budget papers have shown that net migration will more than halve from 528,000 to 260,000 between 2022-23 and 2024-25.

Figure 3: Overseas migration in Australia, arrivals and net migration, 2013-2023. Source: ABS.



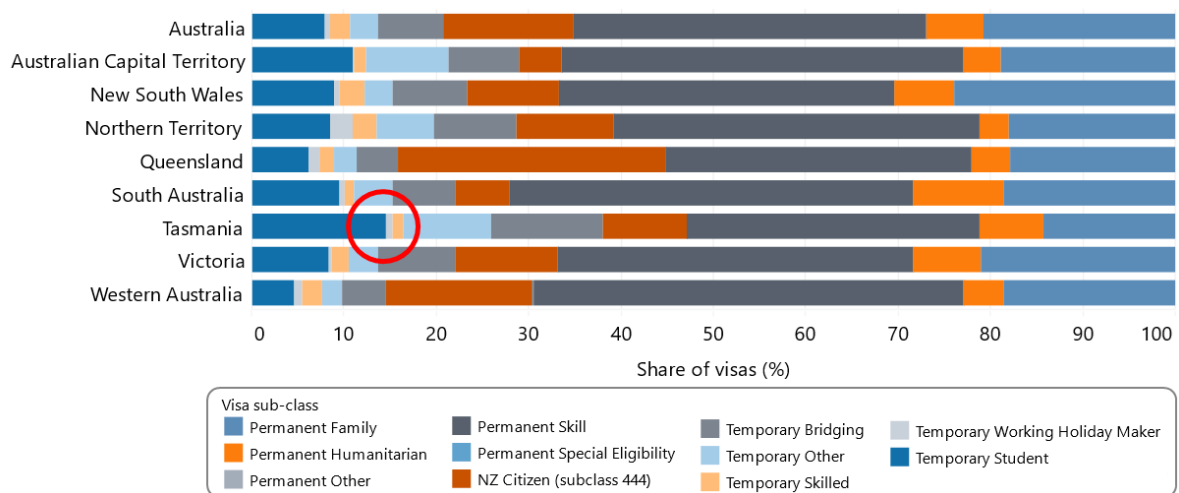
In addition to reducing the level of net migration, the Australian Government has introduced a [Bill](#) that could give the [Minister the power to cap the number of international students enrolled in Australian universities or specific university courses](#).

As a result of the findings from the [2023 Final Report into the Review of the Migration System](#), Australia’s migration program [is currently undergoing significant changes, particularly to working and skilled visas](#). The review found that Australia’s migration program:

- Fails to attract the most highly skilled migrants;
- Does not enable business to efficiently access workers;
- Is unable to respond quickly to skills gaps and areas of high worker demand; and
- Does not sufficient protect migrants – allowing for systematic exploitation.

These changes will be particularly impactful in Tasmania given the importance of international students to population growth in the state. In [previous submissions and engagement](#) on Australian migration policy, the University of Tasmania has highlighted the importance of the international education sector in supporting regional population growth and addressing skills shortages. Temporary student visas comprise roughly double the national-average share among visa holders usually resident in Tasmania (Figure 4), demonstrating their disproportionate importance to overall Tasmanian migration, population growth, and labour markets.

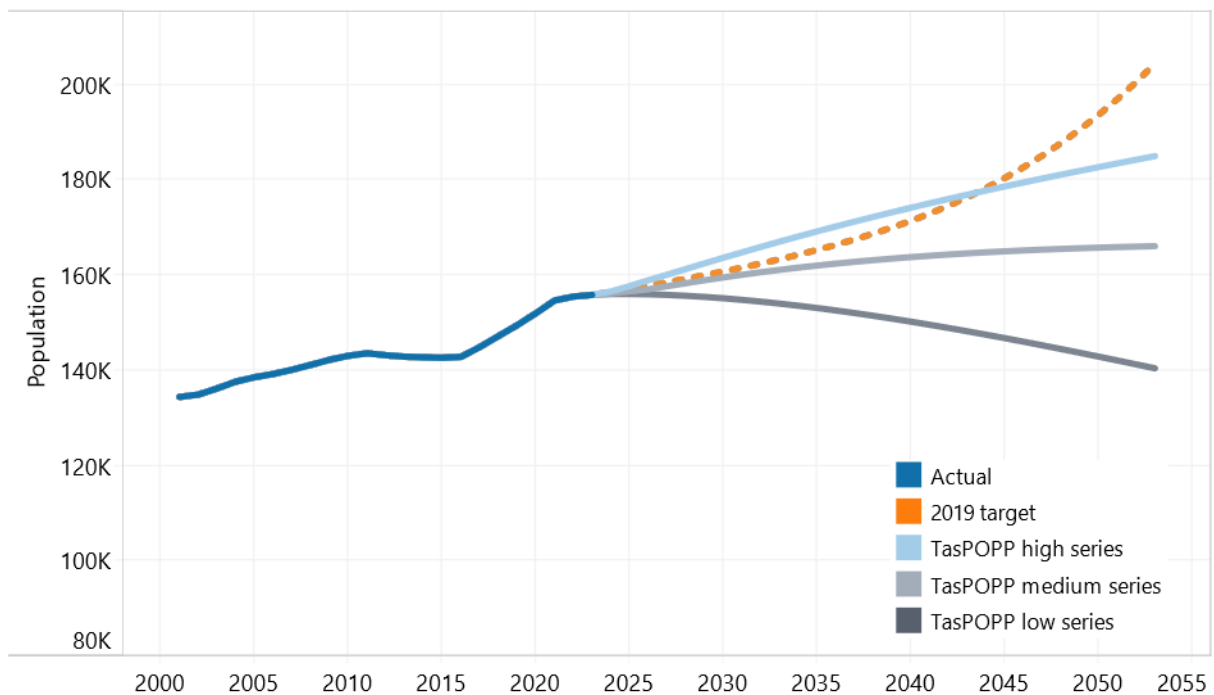
Figure 4: Share of sub-class of temporary and permanent visas by state and territory, 2021. Source: ABS.



1.3 State-level population strategy

The Tasmanian Government [first released a population growth strategy in 2015](#). The plan noted that while Tasmania has the nation's oldest and most rapidly ageing population, growth here is not limited by some constraints present in other jurisdictions (such as a lack of land availability, congestion, unmanageable environmental impacts, etc). In short, and notwithstanding some significant challenges, the plan argued that Tasmania has considerable scope to benefit from sustainable population growth. To this end, it set a target to increase the Tasmanian population from 515,000 to 650,000 by 2050.

Figure 5: Actual, projected, and target population growth in Northern Tasmania, 2001-2053. Source: [TasPOPP](#).



The 2015 strategy identified three 'key pillars' essential to achieving this goal:

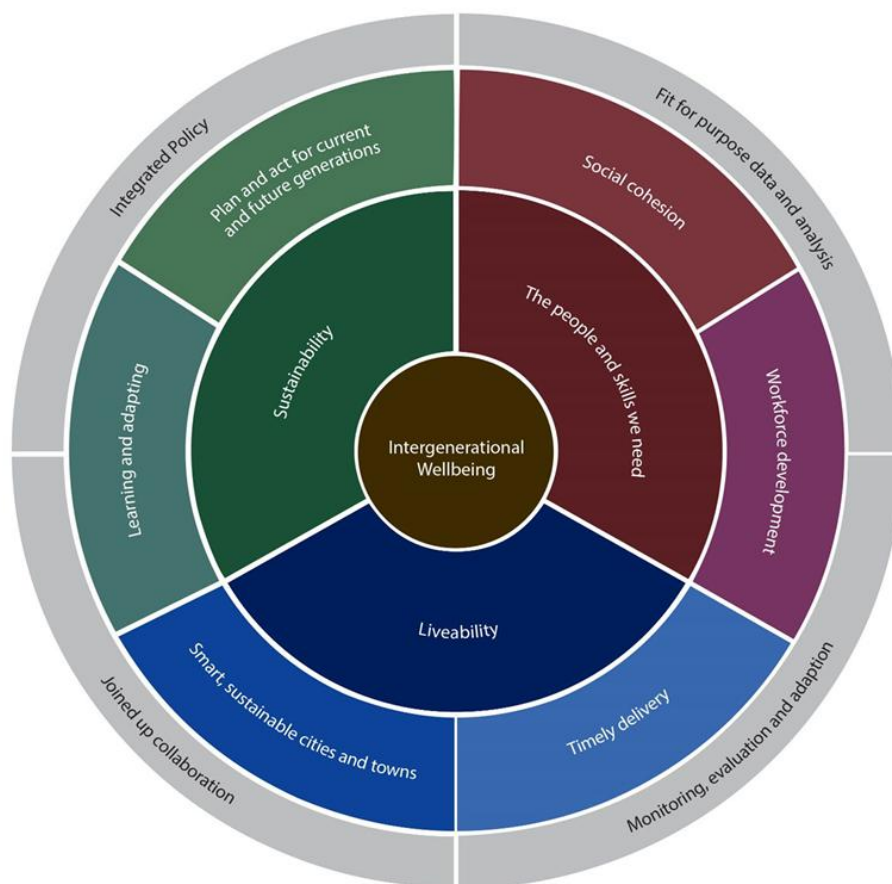
- **Job creation and workforce development** – focusing both on job creation and investment in education and training to help meet future needs.
- **Migration** – both pursuing overseas migration, but also connecting to and encouraging the return of Tasmanian diaspora and retaining young Tasmanians.
- **Liveability** – ensuring that Tasmanians live in vibrant, inclusive communities, have sufficient support for work-life balance to help Tasmanian families have the number of children they desire, and helping migrants feel welcome and supported.

The approach set out in the *Tasmanian Population Growth Strategy* has recently been updated in the 2024 [Tasmania's Population Policy: Planning for our Future](#). This revised policy, which represents a subtle but important shift in framing and priorities, responds to changes in the state's population and demographic context that have taken place since the 2015, including declining housing affordability. *Tasmania's Population Policy* retains the 2015 strategy's goal of 650,000 people living in Tasmania in 2050, while noting the interim (2030) target set in 2015 was achieved in 2022 (8 years early). While implicitly acknowledging that faster-than-anticipated population change has led to 'growing pains' in the form of

infrastructure bottlenecks and housing shortages, the new policy’s three broad priority areas remain broadly consistent with the 2015 strategy:

- **Liveability:** ‘increase liveability through better infrastructure planning and delivery, greater housing supply and diversity and improved services.’ This includes ‘smart, sustainable cities and towns’ and ‘timely delivery’ of infrastructure, services, transport, affordable and diverse housing supply, and access to quality and affordable early childhood education and care.
- **The people and skills we need:** ‘attract and retain the people and skills we need to support current and future generations.’ This captures ‘workforce development’ both in terms of employee skilling and improving meaningful employment outcomes and opportunities as well as equality and inclusivity, and ‘social cohesion’ – both in terms of retaining skilled migrants through improvements to the Australian migration system, and supporting and engaging young people’s participation and feelings of belonging.
- **Sustainability:** ‘understand available data and learn from innovative initiatives to inform systems change.’ This includes ‘learning and adapting’ with new research and tracking of key outcomes and data, and identifying ways to deal with and mitigate potential negative impacts of future population change, and ‘plan and act for current and future generations’.

Figure 6: Population Policy blueprint, illustrating the priorities to be focused on. From the 2024 Tasmanian Population Policy, page 13.



1.4 Previous NTDC strategy

While many regional development strategies address population issues, the 2019 NTDC Population Taskforce Strategy is believed to be the first dedicated population strategy for the Northern Tasmania region, and possibly one of the first regional population strategies developed in Tasmania. This strategy was developed to help address population decline and aging. The strategy was also designed to support Launceston and the broader region's transition to a knowledge-based services and commercial centre.

Prior to the creation of the Taskforce and the 2019 strategy, foundational research was conducted by the National Institute of Economic and Industry Research (NIEIR). This highlighted the need to attract 10,000 skilled workers over the next decade to offset the effects of an aging workforce and a growing economy. The strategy was developed to help achieve this goal by setting targets aimed at reversing regional population decline and enhancing prosperity, aligning with the Northern Regional Futures goals.

The 2019 Taskforce Strategy adopted a multi-initiative approach across a range of State government agencies, the region's LGAs, not-for-profits and private enterprise, with NTDC facilitating the actions as part of their population program.

The strategy focused on increasing the younger working-age population (18-45 years), particularly in areas with skill shortages, attracting entrepreneurs, freelancers, and remote workers and working in the area of welcoming, settling and retention, with the goal of raising Northern Tasmania's population to at least 160,000 by 2031. The population program ran between 2019 and 2022 when the program was paused due to the COVID-19 pandemic and its aftermath.

As the region plans for the future, a clear understanding of population changes in the region and the drivers affecting this change is required. A review is now under way to realign the current population strategy, taking advantage of the updated State population projections and new population policy framework, to ensure there is robust and responsive plan for future challenges and opportunities.

In addition to the 2019 NTDC population strategy, several other Northern Tasmanian policy initiatives have considered population issues as one element of broader strategic planning frameworks. Notable among these are the Launceston City Deal, the Northern Tasmania Regional Land-Use Strategy, the Greater Launceston Plan, the Northern Tasmania Regional Economic Development Strategy (REDS), and several LGA-level strategic plans. Break O'Day Council in particular has undertaken detailed demographic analysis to better understand it's changing population profile. Some of these are outlined in Table 1 below.

Table 1: Other Northern Tasmanian policy initiatives considering population.

	Overview	Population considerations
<p>Greater Launceston Plan (2014)</p>	<p>The Greater Launceston Plan (GLP) creates a unified approach to help support development and long-term planning in the Greater Launceston area (which includes the City of Launceston, George Town Council, Meander Valley Council, Northern Midlands Council, and West Tamar Council).</p> <p>In 2023 the GLP underwent review and is currently in the process of being updated to reflect the changing policy context and landscape of the area.</p>	<p>The GLP highlights the importance of population and demographic considerations to infrastructure and regional planning. This includes residential and land use planning, as well as services and infrastructure development – such as activity centres and employment nodes. Additionally, the GLP uses population as an indicator to measure outcomes and success.</p> <p>One of the social issues identified by the GLP is the ‘age selective out-migration and the aging population’ (i.e., where young people and young families leave the region and are not replaced, or in some cases where they are replaced by older people at the retirement stage of life). This is an important consideration for the growth and structure of population in the longer term and requires appropriate planning. The GLP proposes several foundational programs (including a marketing program) to help attract younger people and migrants to the region.</p>
<p>Launceston City Deal (2017)</p>	<p>Initially a five-year plan, which has been extended to ten years, this is Tasmania’s first city deal. The deal aims to make Launceston ‘Australia’s most liveable and innovative regional city’. It creates common objectives across different levels of government (Commonwealth, Tasmania, and the City of Launceston) as well as local institutions, businesses and the community.</p>	<p>One of the Deal’s objectives is to foster population growth (alongside the growth of business and industry). Additionally, the Deal and its associated projects and plans utilise population and demographic data to help inform strategies and developments within the region.</p>

	<p>The Launceston City Deal involves a wide range of projects and strategies to help improve and plan for the future of the City of Launceston.</p>	
<p>Northern Tasmania's Regional Economic Development Strategy (REDS) (2019)</p>	<p>As part of a commitment of the Launceston City Deal, REDS was developed to set out a vision for Northern Tasmania and identify where future growth is likely to come from. It is designed to incorporate and build on other strategies that are already in place throughout the region, supported by a structured Implementation Program.</p>	<p>Population growth is included as one of the six strategic priorities for the region. The focus of this is on increasing the number of skilled workers, particularly in areas of demand (such as health and construction), by 10,000 by 2031. REDS highlights the importance of ensuring sufficient employment opportunities to support potential resident workers. Additionally, it notes the importance of ensuring that appropriate infrastructure and planning is undertaken to meet the needs of the increasing population.</p>
<p>Regional Land Use Strategy for the Northern Region (2021)</p>	<p>There are three Regional Land Use Strategies across Tasmania, one of which covers Northern Tasmania (defined as the council areas of Flinders, Dorset, Break O'Day, Launceston, George Town, West Tamar, Northern Midlands, and Meander Valley). They form part of the State's land use planning and approvals policy and connect State and Local Government to best provide infrastructure and services for each region. The focus is on medium- to long-term planning.</p> <p>The Regional Land Use Strategy (RLUS) for Northern Tasmania 'sets out the strategy and policy basis to facilitate and manage change, growth, and development to 2032.' It outlines goals and strategic directions for the region, as well as examining and describing regional planning land use categories, regional planning policies, and local provisions.</p> <p>The 2021 RLUS is the fifth edition since 2011 and is currently undergoing review.</p>	<p>Population growth and demographic change are recognised as essential inputs to zoning and planning decisions in the region. This includes the location of urban growth areas, which are required to meet the needs of a growing population. Especially when considering infrastructure, service, and other needs of the population (including housing and employment).</p>

Key insights

- COVID had a significant short-term impact on the movement of people and migration, but evidence suggests it has amplified existing trends.
- Australia is highly dependent on international migration and changes in Commonwealth migration policy will have profound consequences, including on Northern Tasmania.
- The recently released Tasmanian Population Framework, with its emphasis on place and liveability, provides an opportunity to influence regional population and settlement patterns.

Discussion questions

1. What can we learn from previous population strategies and initiatives in our region? What has worked well and what programs we can build on?

2 The state of play: Northern Tasmania’s changing population

From 2019-2023, the population of Northern Tasmania has grown to an estimated 155,894 people (an increase of 6,360, or about 4.3%). While this is slightly below Tasmanian and national averages, and well below NTDC’s 2019 target rate (Figure 5), it is above the national average for similar regions. The ABS classifies greater Launceston as ‘inner regional’ and the rest of Northern Tasmania as ‘outer regional’. Average population growth from 2019-2023 for all inner regional areas across Australia was just under 2.5%, while the outer regional average was 2.9%. By comparison, the growth rates recorded in Launceston and the North East (3.1% and 5.6% respectively), and especially Meander Valley-West Tamar (6.4%) are very strong. Between July 2019 and July 2023, total employment in Northern Tasmania grew by around 8,000 jobs, or 11.3%. The fact that jobs growth outstripped population growth during a period in which the population aged overall is a positive sign.

While overall growth across the region remains relatively strong, recent changes in the components driving that growth are slightly more concerning. Specifically, following very strong growth between 2017 and 2020, the past two years in particular have seen a bit decline in the region’s net internal migration. In 2019-20, net internal migration contributed 450 people to Northern Tasmania’s population; by 2022-23, net internal migration fell to -734. This means that without international migrations, the region’s population would have declined in 2021-22 and 2022-23.

Figure 7: Components of annual population change in Northern Tasmania

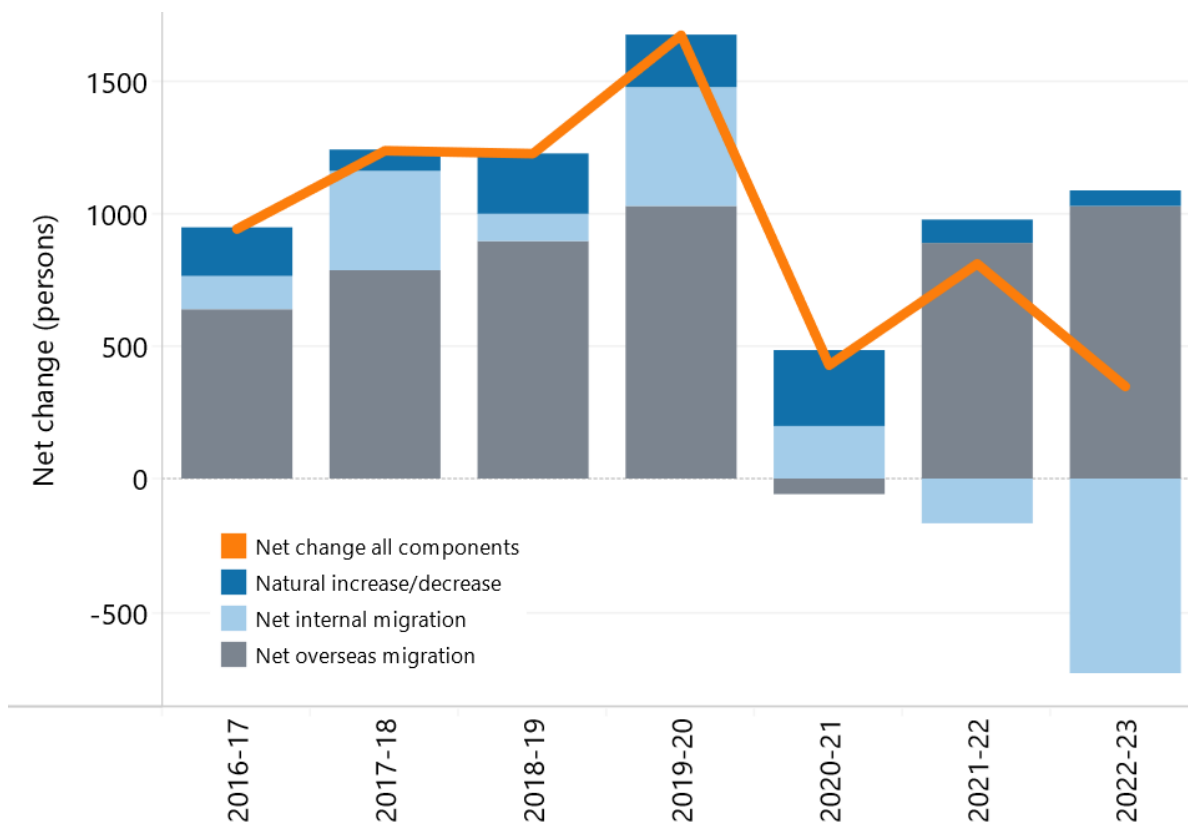


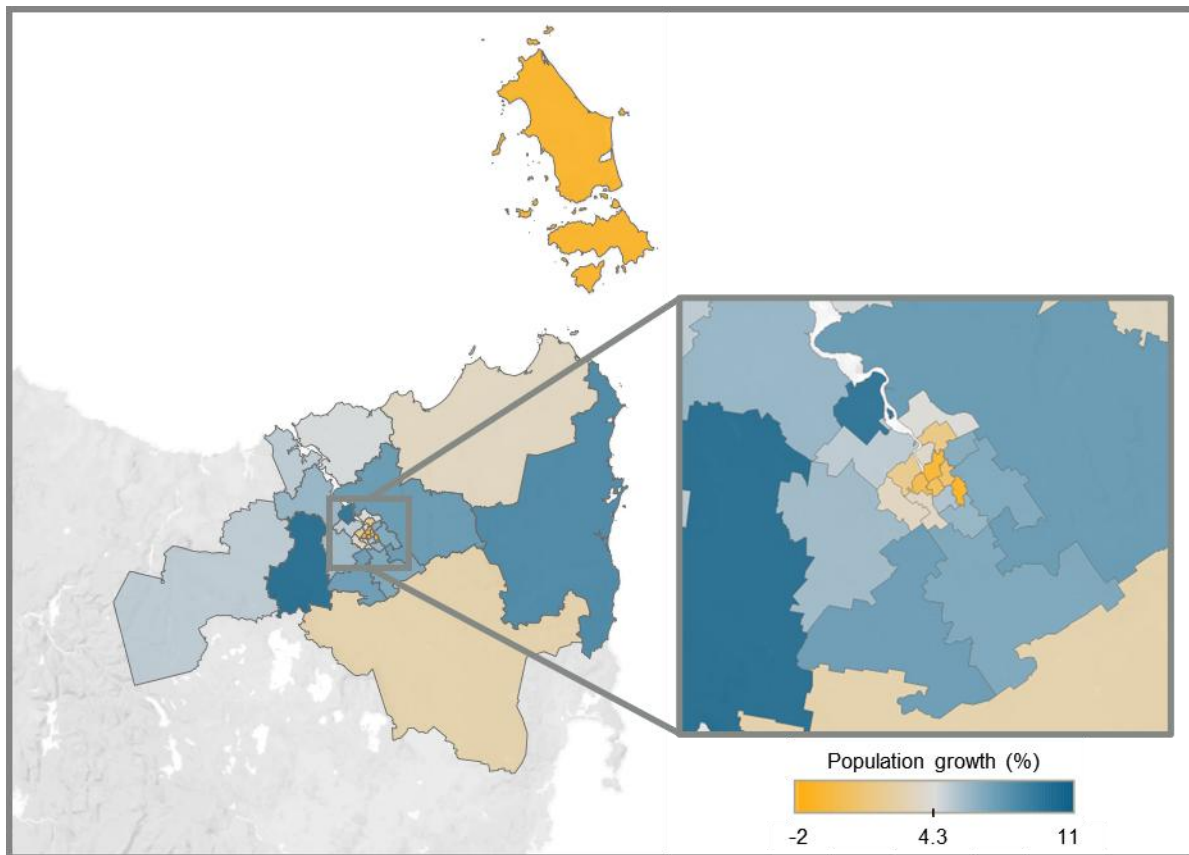
Table 2 below highlights how population growth during this period was also far from evenly distributed across Northern Tasmania. Some LGAs, like Break O'Day, have seen very strong population growth (almost 8.6%) while others have experienced population decline (the population of Flinders, for example, decreased by 1.9%).

Table 2: Population growth in Northern Tasmania, net and percent change 2019-2023.
Source ABS.

Geography	Area	Net change (persons)	Per cent change
SA4	Launceston and North East	6,360	4.3%
SA3	Launceston	2,656	3.1%
	Meander Valley - West	1,523	6.4%
	Tamar		
	North East	2,181	5.6%
LGA	Break O'Day	559	8.6%
	Dorset	222	3.3%
	Flinders (Tas.)	-18	-1.9%
	George Town	310	4.4%
	Launceston	1,900	2.7%
	Meander Valley	1,163	5.7%
	Northern Midlands	787	5.8%
	West Tamar	1,437	5.8%
State	Tasmania	25,315	4.6%
National	Australia	1,314,052	5.2%

Breaking down the distribution of Northern Tasmanian population change still further shows that the changes which have taken place since 2019 conform to a clear geographical pattern. The parts of the region where growth is weakest are remote rural areas, Flinders and Cape Barren Islands, and central Launceston. With the exception of coastal lifestyle communities on the East Coast, population growth has been strongest in the outer suburban and 'satellite' communities on the fringes of greater Launceston, most notably Westbury (+10.6%), Legana (+10.1%), Dilston-Lilydale (+7.6%), Longford (+7.6%), and Perth-Evandale (6.9%).

Figure 8: Population change across Northern Tasmania relative to region-wide average (4.3%), 2019-2023. Source: ABS.



The geographical pattern of overall population change across the region is mirrored by equally stark divergence in the components of that change from year to year and from place to place. This means that different parts of Northern Tasmania have gained (and lost) residents from different sources of population change since 2019.

In Greater Launceston, overall population change is driven almost entirely by international migration. In the 12 months to June 30, 2023, the population of Launceston is estimated to have shrunk very slightly (by about 0.1%, around 100 people). Without overseas migration, however, that decrease would have been almost ten times larger (more than 850 people, which is close to 1% of the Greater Launceston population). This heavy reliance on overseas migration points to what is perhaps the most important change in Greater Launceston's population dynamics since NTDC last considered these issues in 2019: a large and growing net population loss to internal migration. In 2022-23, some 4,750 people left Launceston for other parts of Tasmania or interstate while only around 3,850 arrived (a net loss of around 900 people).

By contrast, population change in Northern Tasmania's other two SA3s is driven by exactly the opposite components. Where Greater Launceston typically records a modest but healthy degree of natural increase (due to its younger population), Meander Valley-West Tamar and the North East have both experienced either very slight increase or natural decline. Where Greater Launceston experiences net internal out-migration, both other SA3s rely almost exclusively on internal migration for their overall growth.

Key population change trends in Northern Tasmania

- Northern Tasmania depends heavily on international migration for its population growth.
- Internal migration among NTDC member councils is typically from inner Launceston to peri-urban 'satellite' communities (mostly younger people) and from greater Launceston to the East Coast (mostly older people).
- Despite strong employment growth, Northern Tasmania's population is not growing at the rate targeted in its 2019 strategy, suggesting that the area's population dynamics are driven by factors beyond just employment opportunity.

Discussion questions

1. What can be done to arrest Northern Tasmania's growing net population loss to internal migration (i.e., to other parts of Tasmania and the Mainland)?
2. Is growth on Launceston's peri-urban fringe sustainable? What needs to be done to ensure that strategic land-use planning and infrastructure investment can keep pace with rapid population on the outskirts of Greater Launceston?

What we heard from workshop participants

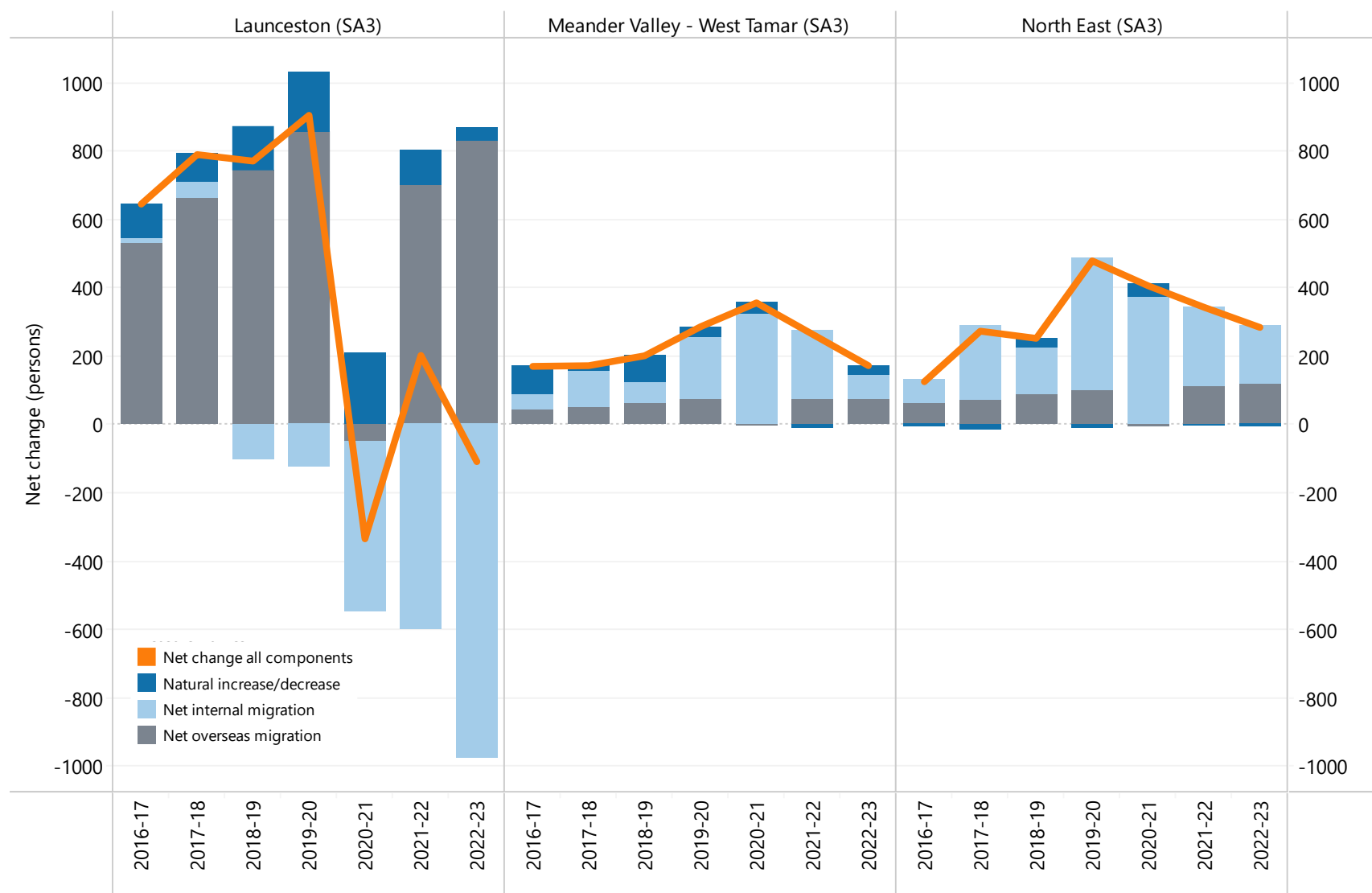
Participants at the workshop recognised the risks that a net-negative internal migration profile poses to Northern Tasmania, as well as the challenges and opportunities presented by rapid growth both in peri-urban parts of Launceston and coastal towns in Break O'Day.

The importance of coordination across all levels of government to ensure that strategic land-use planning goals are aligned and sustainable was a key theme of the discussion. Participants stressed that land releases and zoning, infrastructure investment, emergency services, and asset management, among other factors, were not currently considered in a sufficiently comprehensive or holistic way, leading at times to unmanageable sprawl, congestion, and difficulty accessing services.

The Northern Tasmania Regional Land Use Strategy Review was identified by many participants as a critical opportunity to better align planning, development, and population policy efforts.

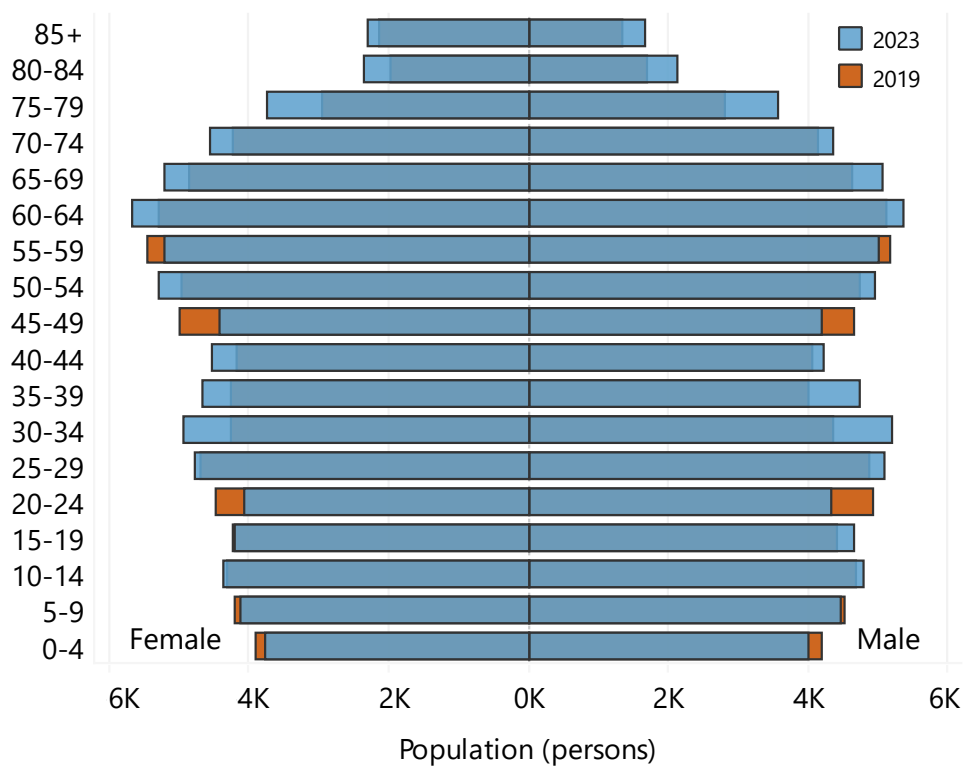
In order to help support families with young children, especially in regional areas, participants emphasised the importance of childcare, public transport, appropriate housing supply, green space and recreation facilities like parks and playgrounds, and support for flexible working arrangements.

Table 3: Population change by components in North-East Tasmanian SA3s, 2017-2023. Source: ABS.



These changes in the drivers and distribution of population change in Northern Tasmania have contributed to significant changes in the area’s demography. Overall, the region’s population has aged since 2019. The share of the population under the age of 40 has remained roughly the same, but the share over the age of 65 has grown by 2%, suggesting not only that the population as a whole is ageing but that the pace at which it is ageing has increased. It is likely that natural aging in Northern Tasmania is being amplified by migration of older people from other parts of Tasmania and the mainland.

Figure 9: Population age structure by sex, all NTDC LGAS, 2019-2023. Source: ABS



All age groups over 60 have recorded both relative and absolute growth since 2019, while half of all age groups under 60 have declined in absolute terms. If this trend continues, population ageing in the region will continue to gather pace and increase pressure on already strained health and social care services. Some individual Northern Tasmanian councils, particularly those in rural and regional areas, face even greater challenges with hyper-ageing populations and slow or negative growth. Ageing in the region is being offset somewhat by migration-driven growth among 25-44-year-olds, which is a positive development. The decline since 2019 in 0-4- and 5-9-year-olds suggests that growth in the 25-44 age bracket has not yet translated to an increase in births.

3 LGA population profiles

3.1 Break O'Day

The population of Break O'Day is one of the oldest in the region, with a median age of 56.6 in 2023. The older cohort continues to grow steadily, with most of the population increase occurring in the 65+ age range. Attracting younger workers and ensuring sufficient aged care and related services will be important, especially given that the participation rate in Break O'Day is below 50%.

Table 4: Break O'Day population changes - 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	7,075
Overall population change	8.6% (1 st of Northern Tasmanian LGAs)
Median age change	0.6 (56.6 years)
Change in population under the age of 15	-30 (855 persons)
Change in population aged between 15 and 64 (working age)	177 (3,885 persons)
Change in population aged over 65	412 (2,335 persons)
Change in number of employed persons	400 (2,969 persons)
Change in participation rate	2.1% (47.7%)
Proportion of resident population that work within this LGA (2021)	77.1%

Figure 10: Break O'Day population age structure by sex, 2019-2023. Source: ABS.

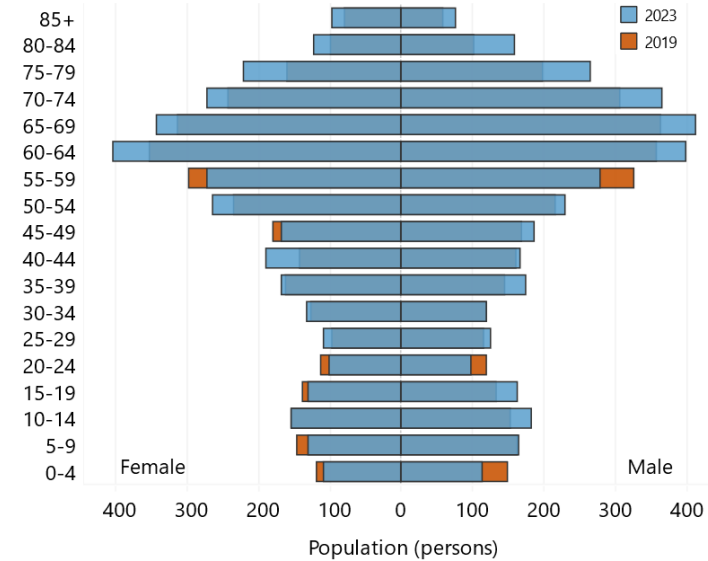
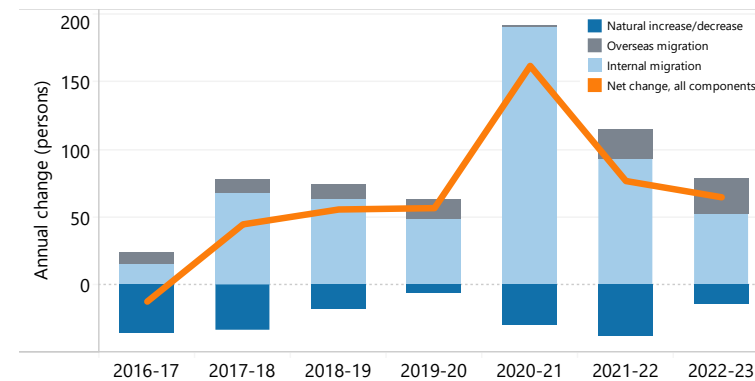


Figure 11: Break O'Day components of annual population change, 2017-2023. Source: ABS.



3.2 Launceston

Launceston has the lowest median age of all Northern Tasmanian LGAs, though it is slowly increasing. Population growth in Launceston is largely due to overseas migration. Sustainable population growth is one of the focus areas of the [City of Launceston Strategic Plan](#). One recent trend in Launceston is a growing net loss to internal migration. This loss likely represents a combination of older people moving to regional communities on the East Coast and younger families moving to the urban fringe.

Figure 12: Launceston population changes – 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	72,788
Overall population change	2.7% (7 th of Northern Tasmanian LGAs)
Median age change	0.3 (38.8 years)
Change in population under the age of 15	-125 (12,173 persons)
Change in population aged between 15 and 64 (working age)	1,000 (46,074 persons)
Change in population aged over 65	1,025 (13,541 persons)
Change in number of employed persons	3,761 (39,451 persons)
Change in participation rate	4.2% (66.2%)
Proportion of resident population that work within this LGA (2021)	77.9%

Figure 13: Launceston population age structure by sex, 2019-2023. Source: ABS.

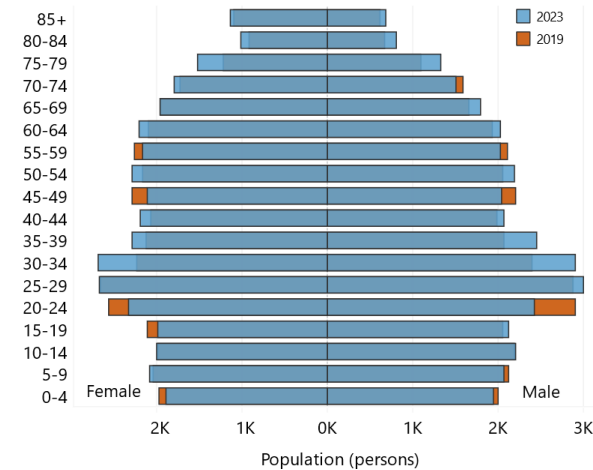
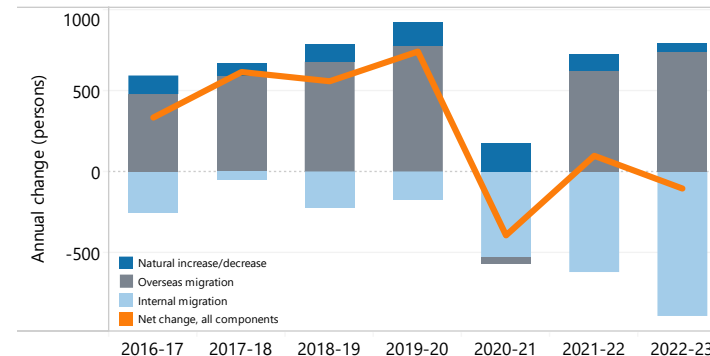


Figure 14: Launceston components of annual population change, 2017-2023. Source: ABS.



3.3 Dorset

In addition to its high median age, Dorset struggles with relatively low workforce participation and population ageing. The majority of Dorset’s population growth since 2019 has been in the over-65 age group. Unlike some other regional LGAs in Northern Tasmania, Dorset benefits from overseas migration but, in recent years at least, has typically lost residents to internal migration. Dorset has had more deaths than births in 6 of the past 7 years, meaning that without international migrants, it would have experienced population decline in most years since 2016. The [Dorset Council Strategic Plan](#) aims to increase population through economic growth.

Table 5: Dorset population changes – 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	7,001
Overall population change	3.3% (6 th of Northern Tasmanian LGAs)
Median age change	-0.1 (48.8 years)
Change in population under the age of 15	-48 (1,112 persons)
Change in population aged between 15 and 64 (working age)	32 (4,025 persons)
Change in population aged over 65	238 (1,864 persons)
Change in number of employed persons	230 (3,567 persons)
Change in participation rate	1.2% (60.6%)
Proportion of resident population that work within this LGA (2021)	77.5%

Figure 15: Dorset population age structure by sex, 2019-2023. Source: ABS.

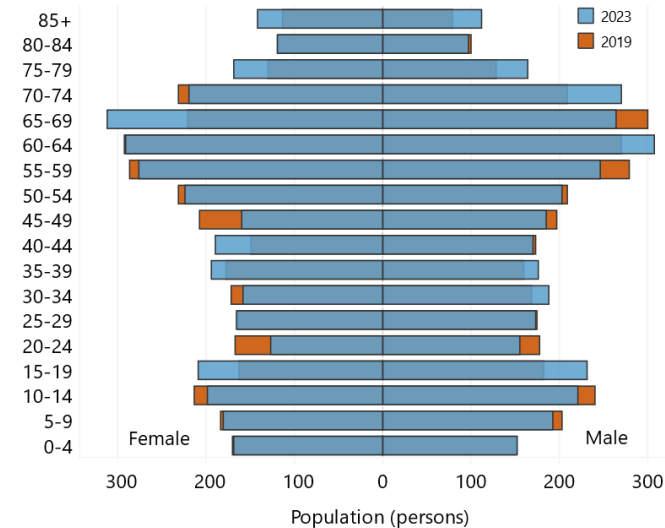
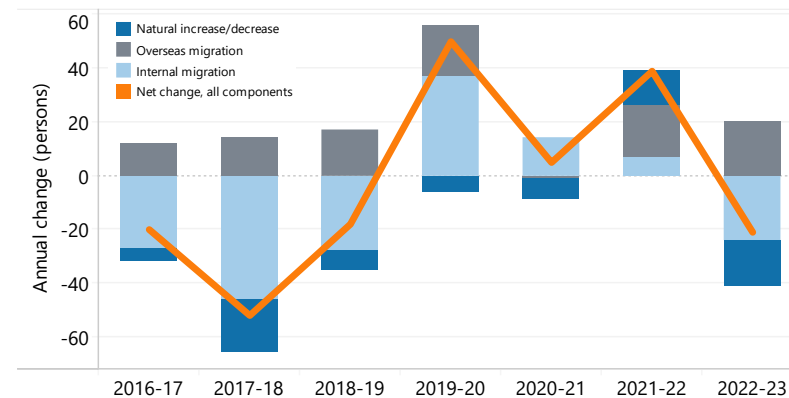


Figure 16: Dorset components of annual population change, 2017-2023. Source: ABS.



3.4 George Town

George Town’s rapid population ageing and low labour market participation present considerable challenges for future sustainable growth and service provision. Around 43% of the employed population of George Town also commute elsewhere for work, mostly to Launceston, and this share has been growing in recent years. As in most other regional parts of Northern Tasmania, almost all of George Town’s population growth has been in the over-65 age bracket, with the population aged under 15 years in decline. Population growth is targeted as a key outcome of the [George Town Strategic Plan](#). Finally, major renewable energy projects (such as the [Bell Bay Hydrogen Hub](#)), will create significant opportunities and challenges for the region, including the need for a skilled workforce.

Table 6: George Town population changes – 2019 and 2023.
Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	7,330
Overall population change	4.4% (5 th of Northern Tasmanian LGAs)
Median age change	1.3 (49.2 years)
Change in population under the age of 15	-73 (1,147 persons)
Change in population aged between 15 and 64 (working aged)	83 (4,249 persons)
Change in population aged over 65	300 (1,934 persons)
Change in number of employed persons	276 (3,193 persons)
Change in participation rate	1.3% (51.6%)
Proportion of resident population that work within this LGA (2021)	56.9%

Figure 17: George Town population age structure by sex, 2019-2023. Source: ABS.

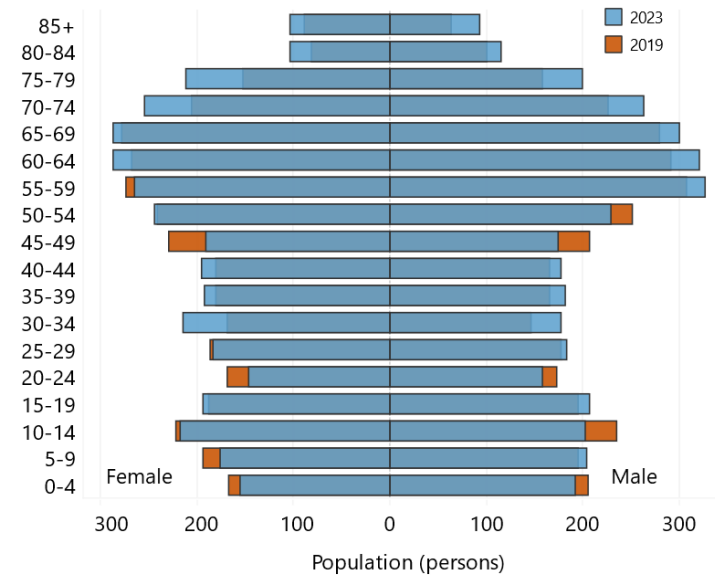
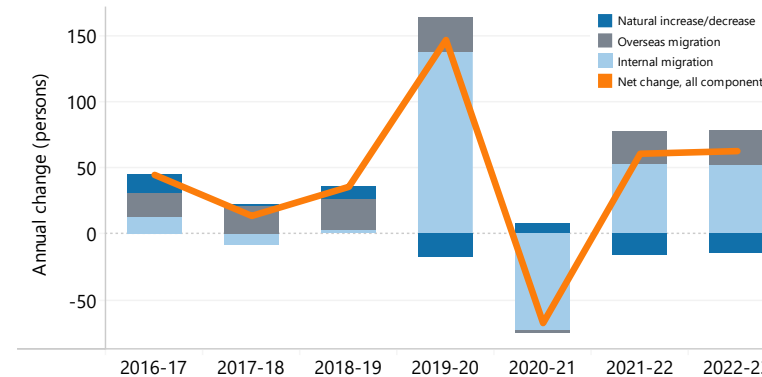


Figure 18: George Town components of annual population change, 2017-2023. Source: ABS.



3.5 Meander Valley

Meander Valley’s population has one of the highest participation rates in the NTDC and has recorded strong net growth across all components (natural increase, internal migration, and overseas migration) for the past 6 years. Younger people who commute to central Launceston for work are an important component of this growth. Nevertheless, and despite a relatively stable population age structure, Meander Valley continues to record the majority of its population growth in the over-65 age bracket. The importance of achieving a balanced population age structure is recognised in the [Meander Valley Strategic Plan](#).

Table 7: Meander Valley population changes – 2019 and 2023.
Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	21,449
Overall population change	5.7% (4 th of Northern Tasmania LGAs)
Median age change	0.1 (46.2 years)
Change in population under the age of 15	-25 (3,491 persons)
Change in population aged between 15 and 64 (working age)	462 (12,757 persons)
Change in population aged over 65	726 (5,201 persons)
Change in number of employed persons	1,182 (11,425 persons)
Change in participation rate	2.5% (63.6%)
Proportion of resident population that work within this LGA (2021)	35.3%

Figure 19: Meander Valley population age structure by sex, 2019-2023. Source: ABS.

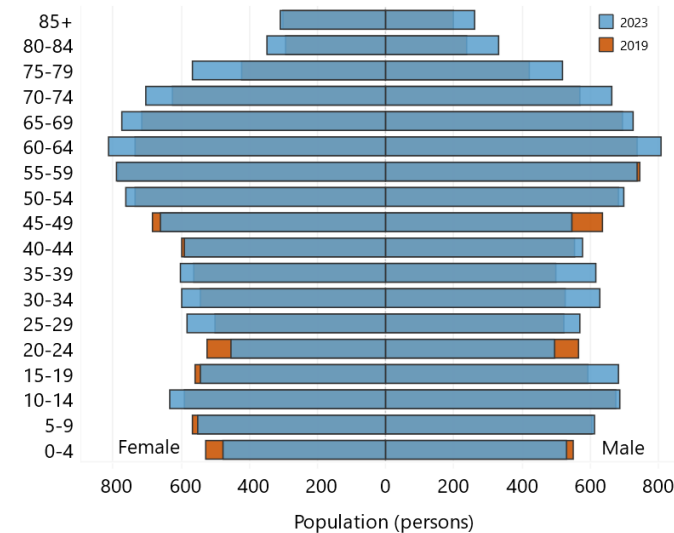
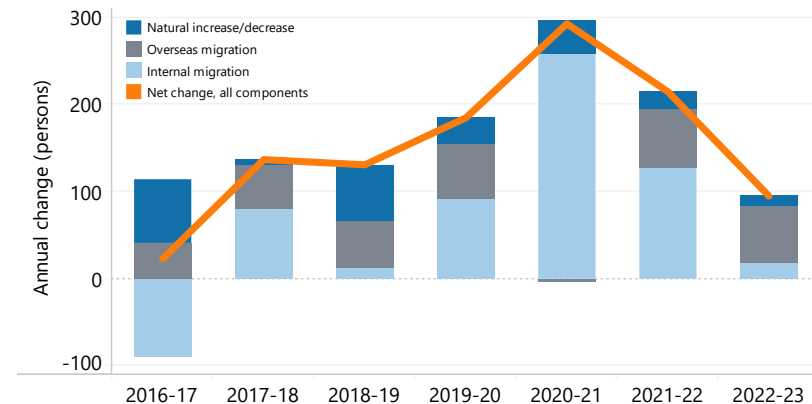


Figure 20: Meander Valley components of annual population change, 2017-2023. Source: ABS.



3.6 Northern Midlands

The Northern Midlands was one of the only regions in Northern Tasmania to record strong net increases across all components of annual population change from 2019 to 2023. It is also the only LGA in the region to grow the number of its residents under the age of 15 years.

Table 8: Northern Midlands population changes – 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	14,279
Overall population change	5.8% (3 rd of Northern Tasmanian LGAs)
Median age change	0.3 (46.1 years)
Change in population under the age of 15	27 (2,316 persons)
Change in population aged between 16 and 64 (working age)	258 (8,486 persons)
Change in population aged over 65	502 (3,477 persons)
Change in number of employed persons	703 (7,530 persons)
Change in participation rate	2.0% (62.9%)
Proportion of resident population that work within this LGA (2021)	42.3%

Figure 21: Northern Midlands population age structure by sex, 2019-2023. Source: ABS.

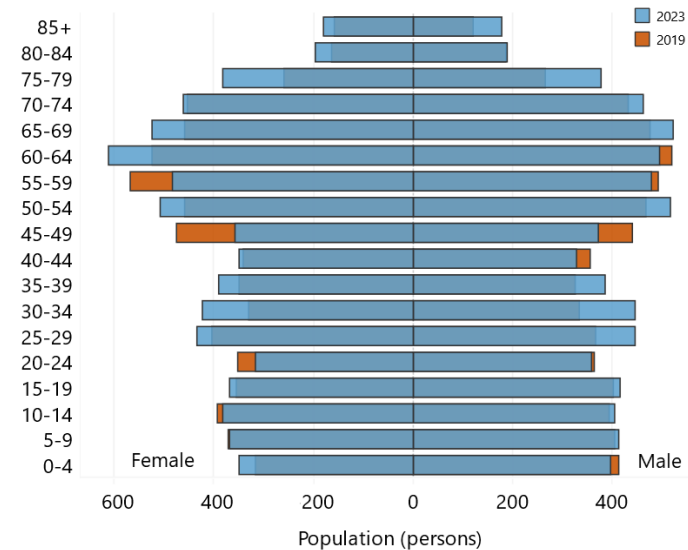
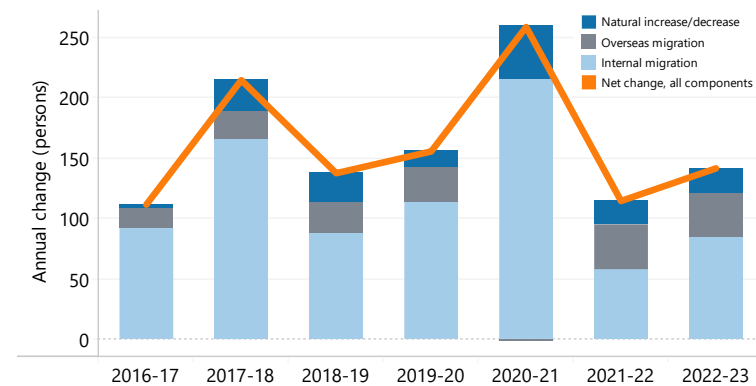


Figure 22: Northern Midlands components of annual population change, 2017-2023. Source: ABS.



3.7 West Tamar

West Tamar has experienced an increase in participation rate and increase in absolute labour force numbers second only to Launceston, and has enjoyed strong growth since 2019. While the majority of its population growth has been among over-65s, West Tamar has a relatively stable population age structure and a manageable age-dependency ratio (Part 5.3). The [West Tamar Council Strategic Plan](#) argues that greater opportunity for population growth will drive local business development.

Table 9: West Tamar population changes – 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	26,039
Overall population change	5.8% (2 nd of Northern Tasmanian LGAs)
Median age change	0.0 (45.8 years)
Change in population under the age of 15	-18 (4,278 persons)
Change in population aged between 16 and 64 (working age)	541 (15,555 persons)
Change in population aged over 65	914 (6,206 persons)
Change in number of employed persons	1,494 (13,705 persons)
Change in participation rate	2.8% (63%)
Proportion of resident population that work within this LGA (2021)	25.8

Figure 23: West Tamar population age structure by sex, 2019-2023. Source: ABS.

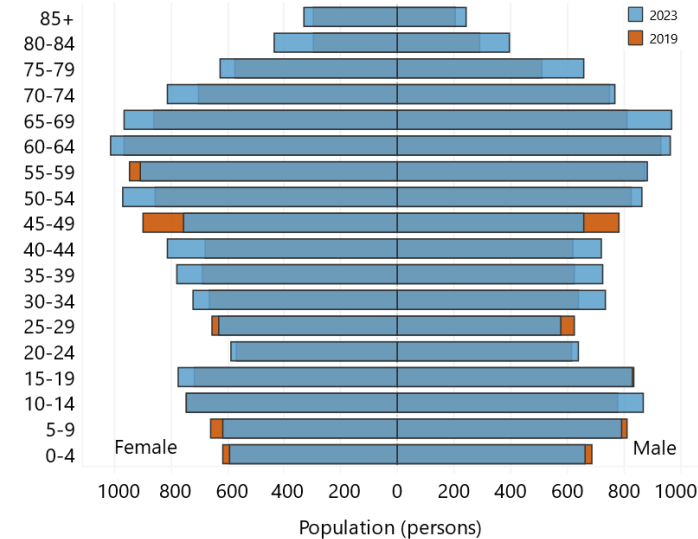
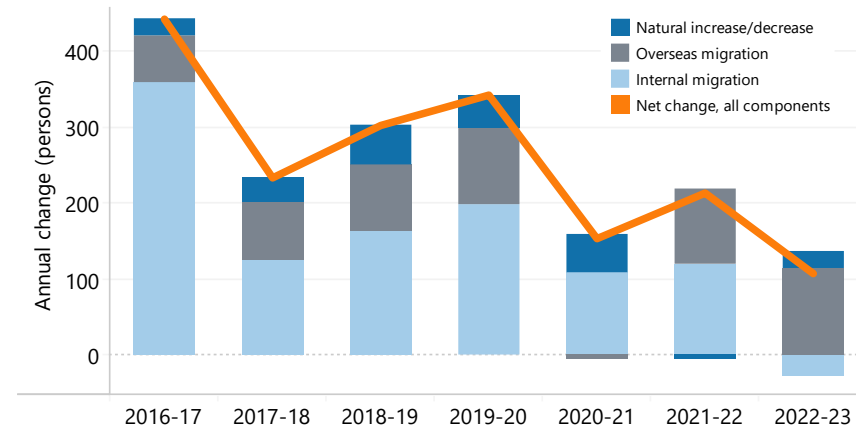


Figure 24: West Tamar components of annual population change, 2017-2023. Source: ABS.



3.8 Flinders

The median age of the population in Flinders has increased by 4 years since 2019, meaning that it has the oldest median age in Northern Tasmania. Given its location, it is important that any population growth plan or strategy also considers the ability for individuals and households to work and gain access to other important services and infrastructure (including schooling, and aged care) in this region. To this end, the [Flinders Council Strategic Plan](#) highlights the importance of a sustainable population structure.

Table 10: Flinders population changes – 2019 and 2023. Source: ABS.

	Change between 2019 and 2023 (total persons in 2023)
Estimated population (2023)	933
Overall population change	-1.9% (8 th of Northern Tasmanian LGAs, and the only negative growth)
Median age change	4.0 (58.6 years)
Change in population under the age of 15	-15 (109 years)
Change in population aged between 16 and 64 (working age)	-64 (471 years)
Change in population aged over 65	61 (353 years)
Change in number of employed persons	The 2019 data on employment for Flinders was unavailable
Change in participation rate	
Proportion of resident population that work within this LGA (2021)	93.1%

Figure 25: Flinders population age structure by sex, 2019-2023. Source: ABS.

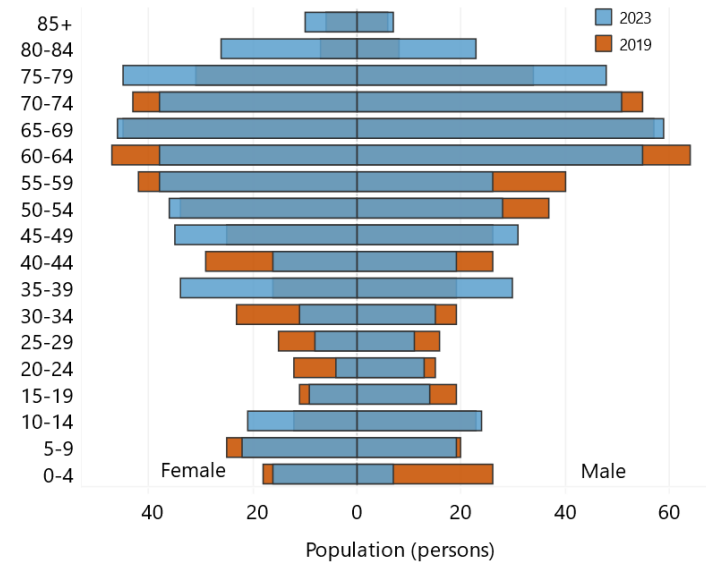
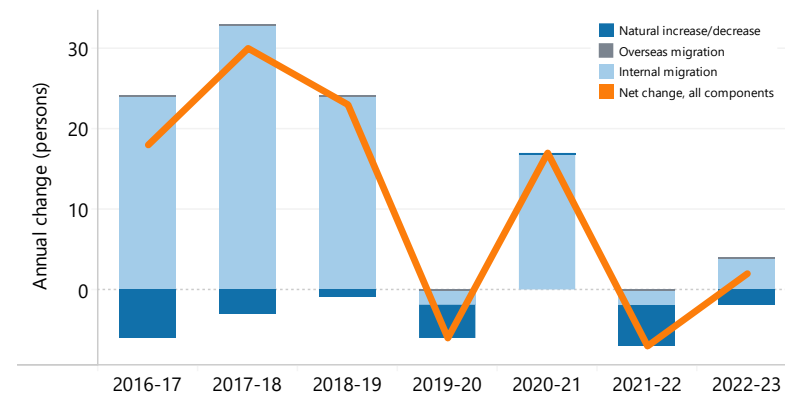


Figure 26: Flinders components of annual population change, 2017-2023. Source: ABS.



4 Census analysis of regional population dynamics

The regional analysis and LGA population profiles presented in Parts 2 and 3 offer valuable insight into *what* has changed in Northern Tasmania over the past decade, but they can only tell us so much about *why* these changes may have occurred. A deeper understanding of the key factors driving population change can only be gained by analysing the more granular demographic data available in the ABS Census. This analysis focusses on three key avenues of inquiry:

- **Social and economic change.** How have the communities and labour markets of NTDC's LGAs evolved between 2011 to 2021?
- **Attraction and retention.** Who is moving to and from Northern Tasmania, where are they coming from or going to, and what is motivating them to move?
- **Commuting and resident movement.** How connected are the regions LGAs to one another and how have these connections evolved over time?

Although the timeframe for NTDC's population strategy revision (2019-2023) does not fit neatly into an intercensal period, analysis of the 2011, 2016, and 2021 censuses provides a strong basis for interpretation of the key drivers underpinning migration to and from NTDC LGAs; population turnover, or 'churn'; demographic and social change; and economic development across the region.

4.1 Social and economic change

The story of social and economic change over the ten years to 2021 in Northern Tasmania has largely been one of widening inter-regional disparity. As noted in Part 2, population growth across the region has been concentrated in the outskirts of Greater Launceston and in coastal lifestyle communities on the East Coast. Many rural and regional areas, on the other hand, have experienced relative¹ or absolute population decline. A similar pattern is discernible across other key metrics. For example, the median age of Launceston residents increased by just 1 year (to 39) between 2011 and 2021. Northern Midlands and West Tamar (+3 years) and Meander Valley (+4 years) were not far behind, thanks largely to movement of younger people to places like Westbury, Legana, Longford, and Evandale.

In rural and regional areas, however, slower population growth has been coupled with considerable population ageing. Ageing in Break O'Day (+6) and Flinders (+5) puts these LGAs among the oldest in the State. Of particular concern is a dramatic increase in the median age of George Town (+7 years), which may be because families with school-aged children have a preference for living in or near Launceston. Unsurprisingly, areas that have experienced rapid population ageing in recent years are also struggling with low workforce participation: both Break O'Day and George Town are below 50%, with unemployment at 7% or higher.

¹ Relative decline refers to below-average growth that shrinks a region's share of the overall population.

Table 11: Summary table of ten-year social and economic change across Northern Tasmania by selected indicators, 2011-2021. Source: ABS.

	Population & 10-year change	Median age & 10-year change	Median weekly household income & 10-year change ²	Overseas-born population & 10-year change	Lone-person households & 10-year change	Population with one or more long-term health condition(s)	Unemployment & labour force participation (Q1 2024) ³	Households experiencing rental/mortgage stress ⁴	SEIFA score, decile, national rank & 10-year change ⁵
Break O'Day	6770 (9.3%)	56 (+6)	\$836 (+6.3%)	21.2% (+9.0 pts)	22.2% (+2.7 pts)	52.0%	7% (44.7% participation)	6.6%	Score: 881 (D2) Rank: 57 (+9)
Dorset	6829 (0.0%)	48 (+4)	\$1039 (+17.7%)	17.4% (+9.9 pts)	22.1% (+0.9 pts)	47.3%	4.4% (55.8% participation)	6.8%	Score: 900 (D2) Rank: 90 (+6)
Flinders	922 (18.8%)	57 (+5)	\$1057 (5.9%)	19.7% (+9.7 pts)	23.7% (+6.0 pts)	47.8%	3.2% (61.3% participation)	3.6%	Score: 947 (D5) Rank: 244 (+5)
George Town	7033 (6%)	49 (+7)	\$996 (+5.1%)	18.7% (+7.6 pts)	24.9% (+5.4 pts)	53.0%	7.2% (47.8% participation)	10.1%	Score: 846 (D1) Rank: 36 (-5)
Launceston	70055 (9.1%)	39 (+1)	\$1310 (+20.1%)	21.5% (+9.9 pts)	27.7% (+0.8 pts)	45.0%	4.6% (60.8% participation)	12.2%	Score: 926 (D3) Rank: 158 (+21)
Meander Valley	20709 (9.6%)	46 (+4)	\$1290 (+16.3%)	17.1% (+6.7 pts)	25.1% (+1.9 pts)	45.6%	2.6% (58.9% participation)	9.1%	Score: 940 (D4) Rank: 214 (-58)
Northern Midlands	13745 (12.4%)	46 (+3)	\$1259 (+15.1%)	15.5% (+7.0 pts)	24.4% (+3.2 pts)	46.3%	2.7% (58.1% participation)	8.3%	Score: 929 (D4) Rank: 172 (-30)
West Tamar	25145 (15.3%)	45 (+3)	\$1402 (+7.7%)	20.3% (+6.1 pts)	22.4% (+2.9 pts)	45.7%	2.7% (58.2% participation)	8.6%	Score: 970 (D7) Rank: 350 (-40)

² Values have been adjusted for inflation.

³ Unemployment and labour force figures are from [Jobs and Skills Australia Small Area Labour Markets data](#).

⁴ Households are considered to be in rental/mortgage stress when more than 30% of equivalised total household income is spent on housing costs.

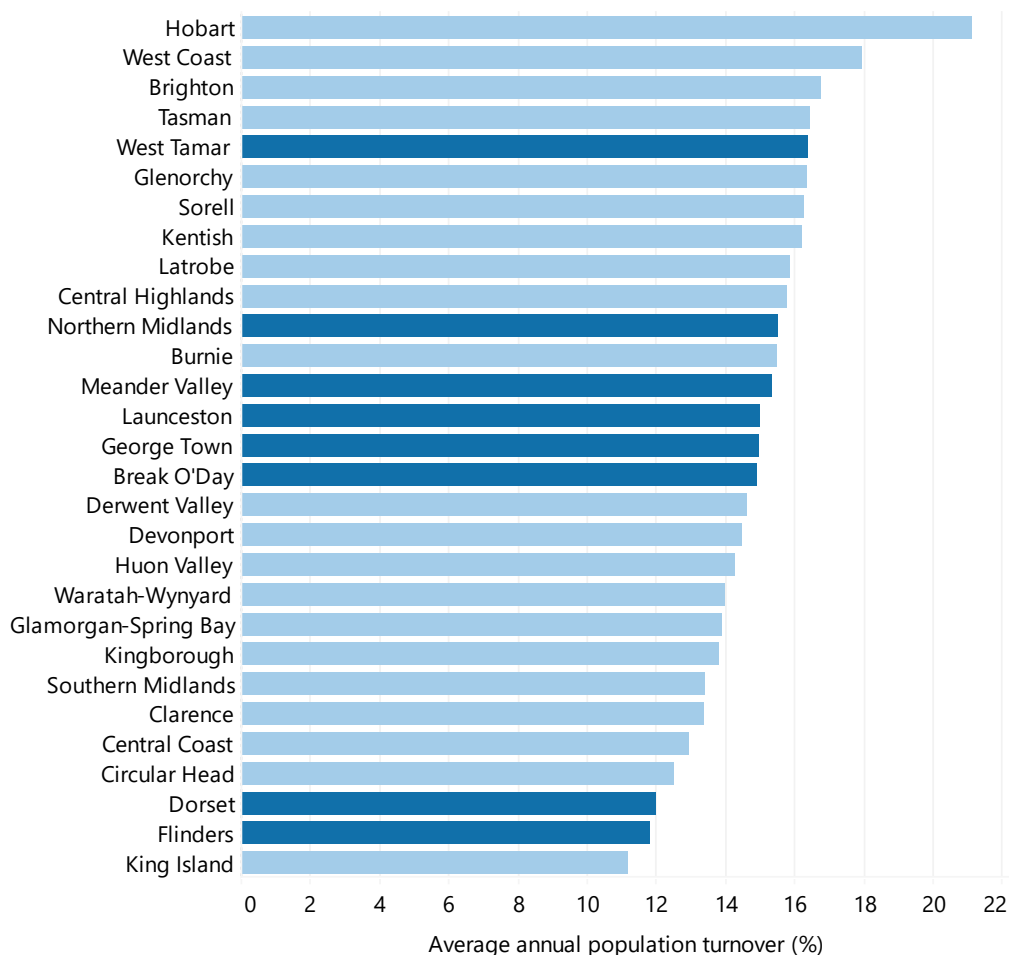
⁵ Socio-Economic Indexes for Areas (SEIFA) Index of Relative Socio-economic Advantage and Disadvantage (IRSAD) ranks areas by socio-economic advantage and disadvantage using ABS Census data. The higher a region's score and rank, the greater its relative level of socio-economic advantage.

While growing geographical inequality in the region is concerning, some changes have been more universally positive. For example, all NTDC LGAs have seen considerable increases in the diversity of their communities since 2011, with the share of population born overseas increasing by between 6 and 10 percentage points. All LGAs also recorded real (i.e., adjusted for inflation) increases in household income between 2011-2021, though the size of these increases varied. Indeed, the gap in household income between the most well-off LGA (West Tamar) and the most disadvantaged (George Town) grew by about \$50 a week.

4.2 Attraction and retention

As the LGA profiles in Part 3 illustrate, rates of migration across the Northern Tasmania vary considerably from one LGA to the next. The cumulative impact of inward and outward migration is often described as population turnover,⁶ or ‘churn’, and can give an indication of the stability or dynamism of a population. Some Northern Tasmanian LGAs, like West Tamar, experience relatively high turnover while others, like Dorset and Flinders, have more stable populations.

Figure 27: Five-year average annual rate of population turnover by LGA, 2023. Source: ABS.



Very high [population churn can undermine community connections and cohesion](#). For example, some mining communities with high rates of fly-in-fly-out (‘FIFO’) employment report decreased rates of volunteering and community engagement. On the other hand, a

⁶ Annual population turnover is calculated by expressing all arrivals and departures in a given year as a percentage of an area’s total population.

very low rate of population turnover can limit a community's exposure to diversity and new ideas, potentially undermining their vitality and dynamism. Whilst this is not currently an issue in Northern Tasmania, it highlights the importance of balanced migration and promotion of regional communities' liveability and amenity.

In addition to these social, economic, and cultural impacts, population turnover influences the demographic composition of communities. For this reason, it is important to understand who is leaving communities and who is arriving. Variations in these characteristics have had a marked impact on the Northern Tasmanian population in recent years, particularly in LGAs subject to higher rates of population turnover.

Table 12: Origin of recent arrivals and departures. Source: ABS.

Characteristics of people moving to Northern Tasmania by region of origin			
	<i>Rest of Tasmania</i>	<i>Interstate</i>	<i>Overseas</i>
Median age (years)	35.1	39.0	29.8
Unemployment rate (%)	8.4	8.1	10.0
Participation rate (%)	60.9	66.1	74.3
Median income (\$)	628.0	755.8	695.8
Occupational skill in current job ⁷	2.8	2.7	3.3
Share requiring assistance with core activities (%)	7.8	8.2	1.5
Share with one or more long-term health conditions (%)	45.1	36.1	12.1
Parent in family household ⁸ (%)	18.8	23.7	19.9

Characteristics of people leaving Northern Tasmania by destination			Long-term Northern Tasmanian residents
	<i>Rest of Tasmania</i>	<i>Interstate</i>	
Median age (years)	34.4	33.0	46.8
Unemployment rate (%)	8.0	8.7	5.2
Participation rate (%)	64.5	64.8	59.3
Median income (\$)	730.4	721.8	669.1
Occupational skill in current job	2.6	2.8	3.0
Share requiring assistance with core activities (%)	7.1	6.3	7.8
Share with one or more long-term health conditions (%)	43.0	39.2	43.2
Parent in family household ⁸ (%)	18.6	20.4	26.5

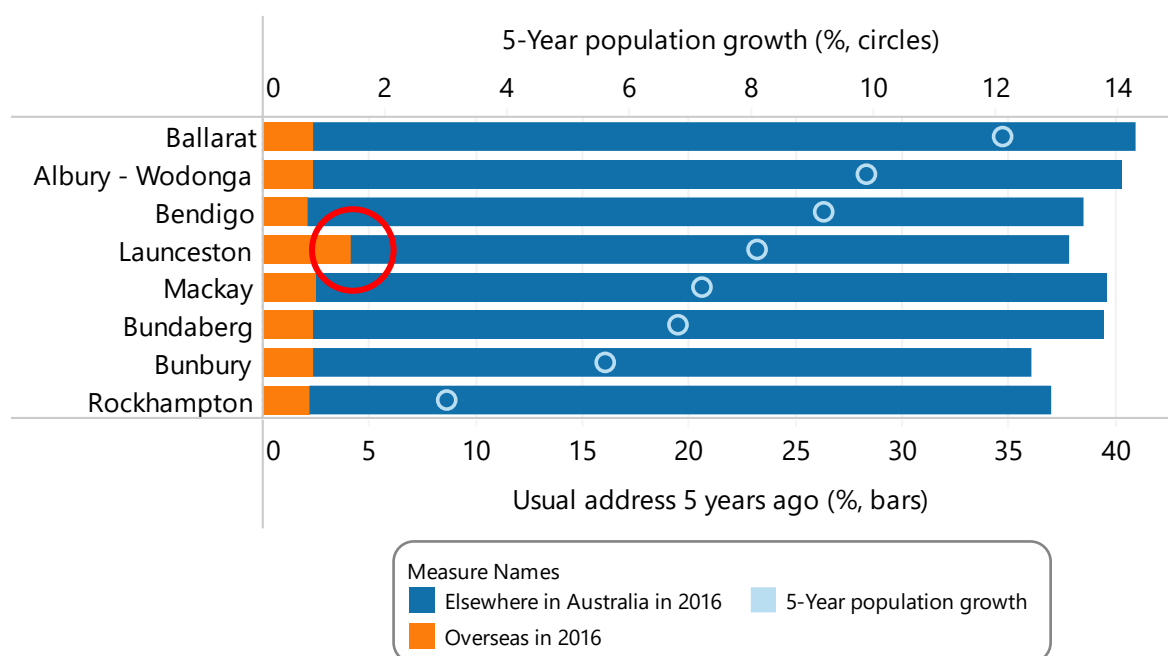
⁷ This variable is derived by ranking occupations by the level of skill and training required to perform them. Level 1 occupations are the highest skilled and level 5 the lowest skilled. More information on occupational skill level, including a list of occupations under each level, is available [here](#).

⁸ This variable identifies parents of children usually resident in family households. The percentage reported combines male and female respondents, which means that two-parent households are in effect counted twice. The data reported are therefore robust for comparison but will not necessarily reflect the broader incidence of parents with children as a household type.

The characteristics of recent arrivals to and departures from Northern Tasmania, as well as long-term residents, differ in several important ways.

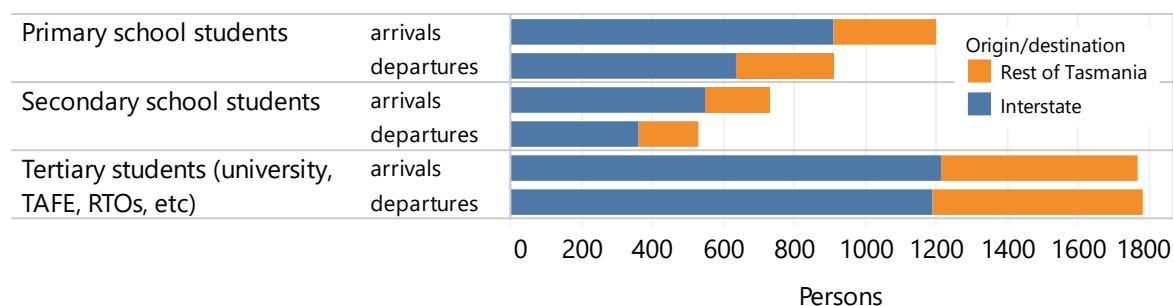
- Median age.** Age is perhaps the most drastic difference between new arrivals, departures, and long-term residents. The median age of long-term NTDC residents (people who had lived in the region for more than 5 years) was just under 47 in 2021, which was far older than either former residents or recent arrivals to the area. The origins and destinations of arrivals and departures also make a difference: people moving to Northern Tasmania from overseas are, on average, about 10 years younger than arrivals from other parts of Tasmania. This means that overseas migration is crucial to mitigating structural ageing. Interestingly, as Figure 27 below illustrates, Launceston is actually around twice as dependent on international migration for overall population growth as similar sized regional cities in other parts of Australia.

Figure 28: Population change by per cent growth and origin of migrants, selected significant urban areas, 2016-2021. Source: ABS.



- Household composition and children.** It is often assumed that one cause of population ageing in regions like Northern Tasmania is out-migration of families with young children, and this can indeed be a significant factor in some places. This does not appear to be the case in Northern Tasmania, however (or at least not at the region-level). Long-term residents are more likely than either recent arrivals or former residents to live in single-family households with children. Nevertheless, it is likely that many young families leave rural and regional areas in favour of outer suburban parts of Greater Launceston in particular. In 2021, around 300 more primary school students moved to Northern Tasmania from interstate or other parts of Australia than left the region. Arriving secondary school students outnumbered departures by a similar margin. Arrivals and departures of tertiary students were roughly equal, but the below figures do not include the roughly 1000 overseas students who arrived in that year (overseas arrivals are excluded from Figure 29 because equivalent data on departures are not available).

Figure 29: Enrolment of internal migrants in education institutions by type, 2021. Source: ABS.



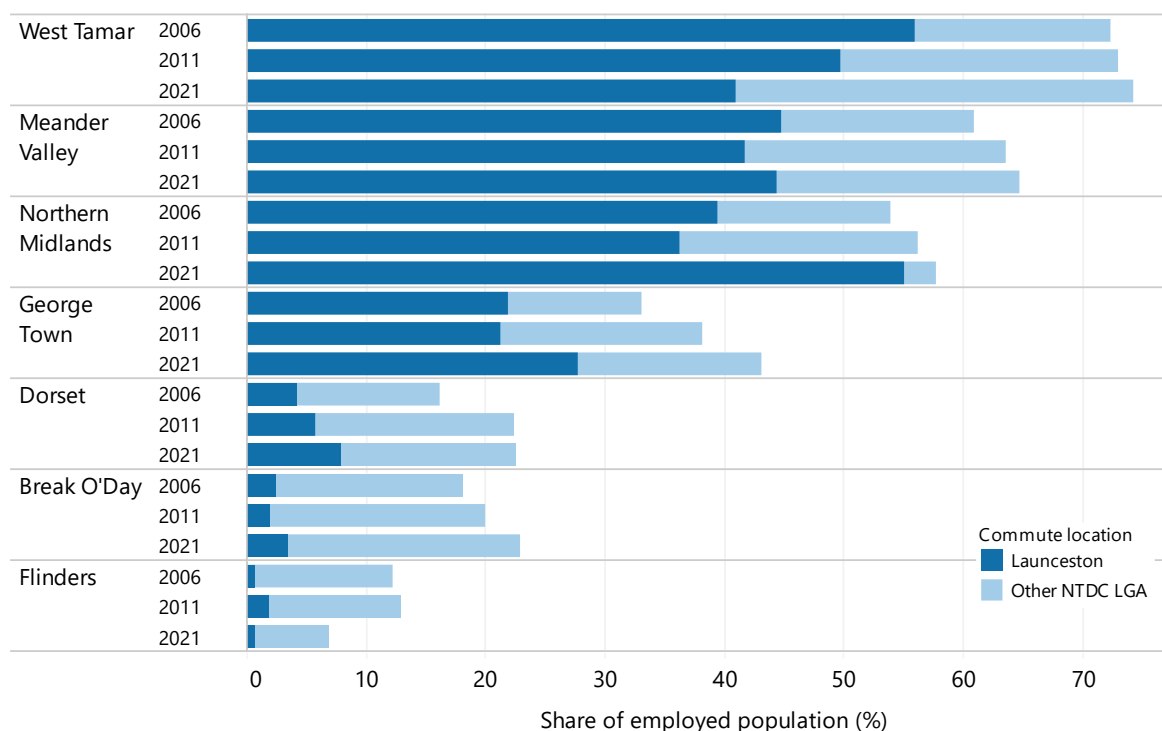
- Education and income.** A second key point of difference is arrivals' and departures' levels of education, employment and income. Recent arrivals to Northern Tasmania are typically more highly paid, more highly skilled, and more likely to be participating in employment or education and training than long-term residents. Concerningly, however, the same is true of former Northern Tasmanian residents who have recently moved elsewhere, who earn (on average) between \$50 and \$60 more per week than long-term residents and also work in more highly skilled jobs.
- Health and wellbeing.** The third important area of difference is in the health and wellbeing of arrivals and departures compared with long-term residents. Around 43% of long-term Northern Tasmanian residents suffer from one or more chronic health condition(s), and just under 8% require assistance with core day-to-day activities due to serious health conditions, disability, mobility limitations, or old age. On the whole, people moving to Northern Tasmania from other parts of Tasmania or Australia are more likely to suffer from chronic health conditions and require assistance with core activities than people moving away, which suggests that internal (both inter- and intra-state) migration is likely to be exacerbating health and aged care service delivery challenges. Overseas migrants, on the other hand, are far less likely than the general population to suffer from chronic health conditions or require assistance with core activities.

4.3 Commuting and resident movement

A final trend evident in Northern Tasmania is the increasing connectedness of LGAs to one another, and particularly to Greater Launceston. In 2006, 37% of employed people in Northern Tasmania worked in their 'home' LGA. By 2021, this share had fallen to 31%. All LGAs except for Flinders have seen an increase in the share of employed people who commute to another LGA in Northern Tasmania for work, and most of this commuting is to Launceston. Some individual LGA increases have been particularly dramatic. For example, the share of employees commuting to Launceston from Northern Midlands each day increased by 20 percentage points from 2011-2021.

These commuting connections demonstrate the extent to which many smaller communities that were once important regional hubs in their own right (most notably places like Evandale, Perth, Longford, and Westbury) increasingly resemble satellite commuting suburbs of Launceston. This shift, while relatively subtle, has considerably implications for strategic regional land-use planning, infrastructure, development, and service provision across the region.

Figure 30: Employees who leave their home LGA for work by destination, 2006-2021.
Source: ABS.



Key insights

- Differences in the rates, components, and impacts of population change across Northern Tasmania have contributed to increasing inequality among member councils. While some areas have enjoyed the benefits of strong population and employment growth, others are at risk of being left behind.
- The characteristics of recent arrivals to Northern Tasmania, recent departures, and long-term residents differ markedly, with important implications for the region's economy and demography. Key differences include:
 - Long-term residents are older than recent arrivals or departures. People arriving from overseas tend to be much younger than arrivals from other parts of Tasmania or interstate.
 - Recent arrivals and departures tend to be more highly paid, more highly skilled, and more likely to be participating in employment/education and training than long-term residents.
 - Inter and intra-state migration is likely to be exacerbating health and aged care delivery challenges. Overseas migrants are far less likely than the general population to suffer from chronic health conditions or require assistance with core activities.
- More and more residents of Northern Tasmania are leaving their 'home' LGA for work, likely due to internal migration away from central Launceston to surrounding areas like Westbury, Perth, Evandale, and Longford. This will be an important factor for strategic regional land-use planning, infrastructure, development, and service provision across the region.

Discussion questions

1. What can Northern Tasmanian councils and NTDC do to retain a larger number of international migrants and interstate students?
2. What is causing the growth in economic disparity between Northern Tasmania's LGAs, and what can be done to promote growth in communities at risk of being left behind?

What we heard from workshop participants

Strategies to capitalise on the opportunity presented by longer-term retention of international migrants focussed on a handful of discrete but complimentary factors:

1. Meeting a diverse array of community needs locally

One of the key challenges to retention for migrants discussed at the workshop was the relative difficulty of accessing appropriate cultural and religious facilities locally in Northern Tasmanian communities. Frequently cited examples include mosques and Islamic cemeteries and associated funeral/burial services. The absence of these important services is a considerable limitation on the ability of observant Muslims to settle in Northern Tasmania for the long term. The issue of accessing tailored services is not limited to migrant communities either: many participants also stressed the importance of community health and support services to comfortable and dignified ageing-in-place for older people in regional areas.

2. Combatting prejudice and stigma

Attitudes toward the value of diversity and multiculturalism slowly [continue to improve in Australia](#), but it remains the case that many migrants experience both overt racism and subtler manifestations of discrimination. Negative community perceptions and the experience of racism undermine migrants' feelings of belonging and connectedness, and also drastically limit the enormous economic contribution migrants make to Tasmanian communities. Research on underutilisation of migrants' skills has shown that the Australian economy would benefit to the tune of \$9 billion annually if people born overseas were employed in jobs befitting their level of education. Participants at the workshop emphasised the importance of orientation and 'concierge' services to welcome migrants and help them find and access services, as well as ongoing community and employment supports that would enable migrants to find and maintain long-term, fulfilling employment.

3. Recognising migrants' skills and qualifications

Many participants noted the complex, multifaceted and intergovernmental challenge of ensuring that migrants are able to utilise their training and expertise in Australian and Tasmanian jobs. At present, a large number of migrants whose university qualifications are not recognised by Australian employers or certification bodies are underutilised in areas of high skills demand. As noted above, this challenge is overlaid and amplified in some cases by prejudice and discrimination.

4. Overcoming social isolation and loneliness

Social isolation and cultural dislocation were frequently cited as a barrier to retention of overseas migrants in Northern Tasmania. Participants highlighted that several welcoming initiatives do exist – including the Pacific Festival in the Northern Midlands and social media groups in George Town, for example. However, many participants believed that large private employers are currently doing a better job at connecting and welcoming migrants than government.

5 Population projections

Every five years, the Tasmanian Government releases population projections that provide a valuable window into potential future population outcomes under different fertility, life expectancy, and migration scenarios. The most recent iteration of these projections was released in 2024. The most likely 'medium series' projection scenario paints a picture of continued growth but also considerable ageing, with important implications for labour markets and service provision. The medium series projections would [see the following outcomes at the state level:](#)

- Tasmania's population would exceed 600,000 people by 2032, ultimately reaching around 641,000 by 2053;
- Population growth would continue over the coming 30 years but at a gradually declining rate;
- Deaths would outnumber births by 2032, meaning that any subsequent growth would be attributable entirely to increased migration;
- Population ageing would continue, and the state's median age would be approaching 49 years by 2053;
- The proportion of older people and children to 'working-aged' Tasmanians would continue to grow;
- The number of Tasmanians aged over 85 years would increase from around 2.5% of the total population to almost 7%.

In addition to this state-level snapshot, the projections also model population trajectories under low, medium, and high growth scenarios by age and sex at the LGA level. These LGA-level projections are valuable tools for policy, planning, and analysis, but they are inherently speculative and should be interpreted with caution. Factors that influence the growth and distribution of populations are very challenging to predict even over the short term, let alone a 30-year time horizon. For this reason, it is essential that population projections are understood not as forecasts or predictions but rather as the potential long-term population implications of different sets of assumptions.

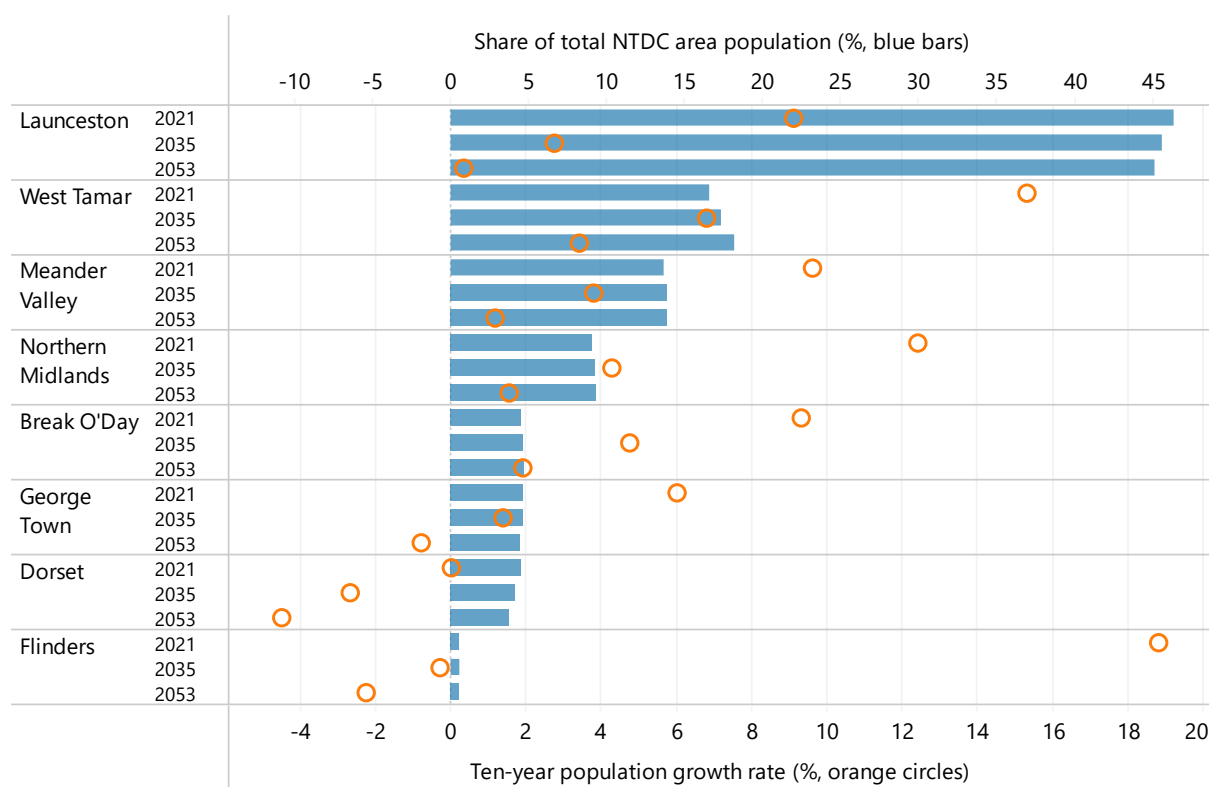
Unless otherwise stated, all data reported here are from the 'medium series' projections. There are essentially three key sets of takeaways from this data for NTDC and its member councils.

5.1 Overall population growth and distribution

Under the assumptions underpinning the medium series scenario of the projections, the population of Northern Tasmania would grow by around 10,000 people (roughly 6.4%) between now and 2053 (the end of the projection period). Much of this growth is projected to be in the coming decade, with the rate of growth slowing considerably after that time. Some LGAs (George Town, Dorset, and Flinders) would enter population decline during the projection period while Launceston's growth will slow almost to zero.

This means that the distribution of population would continue to shift. The greatest beneficiaries of this shift would be West Tamar and Meander Valley – which would more and more resemble outer suburbs of Launceston – while Launceston's share of the overall Northern Tasmanian population would continue to decline.

Figure 31: Current and projected future distribution of population among Northern Tasmanian Councils. Source: [TasPOPP 2023](#).



5.2 Population ageing

The second clear takeaway from the population projections is that, if current trends continue, the population of Northern Tasmania will age significantly in the coming decades. The medium series projections show Northern Tasmanian population as a whole ageing 7 years, to 50, between now and 2053. Many individual LGAs are projected to experience even more severe ageing. Both George Town and Flinders are projected to record a median age increase of 9 years, with Flinders and George Town both surpassing a median age of 60.

Table 13: 2021 median age and 2053 projected median age. Source: [TasPOPP](#).

	Median age 2021	Median age (projected) 2053	change
Break O'Day	56	63	+7
Dorset	48	56	+8
Flinders (Tas.)	57	66	+9
George Town	49	58	+9
Launceston	39	45	+6
Meander Valley	46	53	+7
Northern Midlands	46	52	+6
West Tamar	45	51	+6
Northern Tasmania Total	43	50	+7

The picture painted by these data is undeniably concerning and while considerable median age increases are almost certain, some of the more extreme LGA-level changes are unlikely to materialise as projected. In rural/regional areas like Break O’Day and especially on Flinders Island, it is practically impossible that local health, aged care, and social services workforces would be capable of meeting the needs of communities in which half of the population is over the age of 65. This means that rather than the extreme levels of projected population ageing, these and similar areas would likely face steeper population decline as older people move to places where their needs can be met.

5.3 Labour force as a share of total population

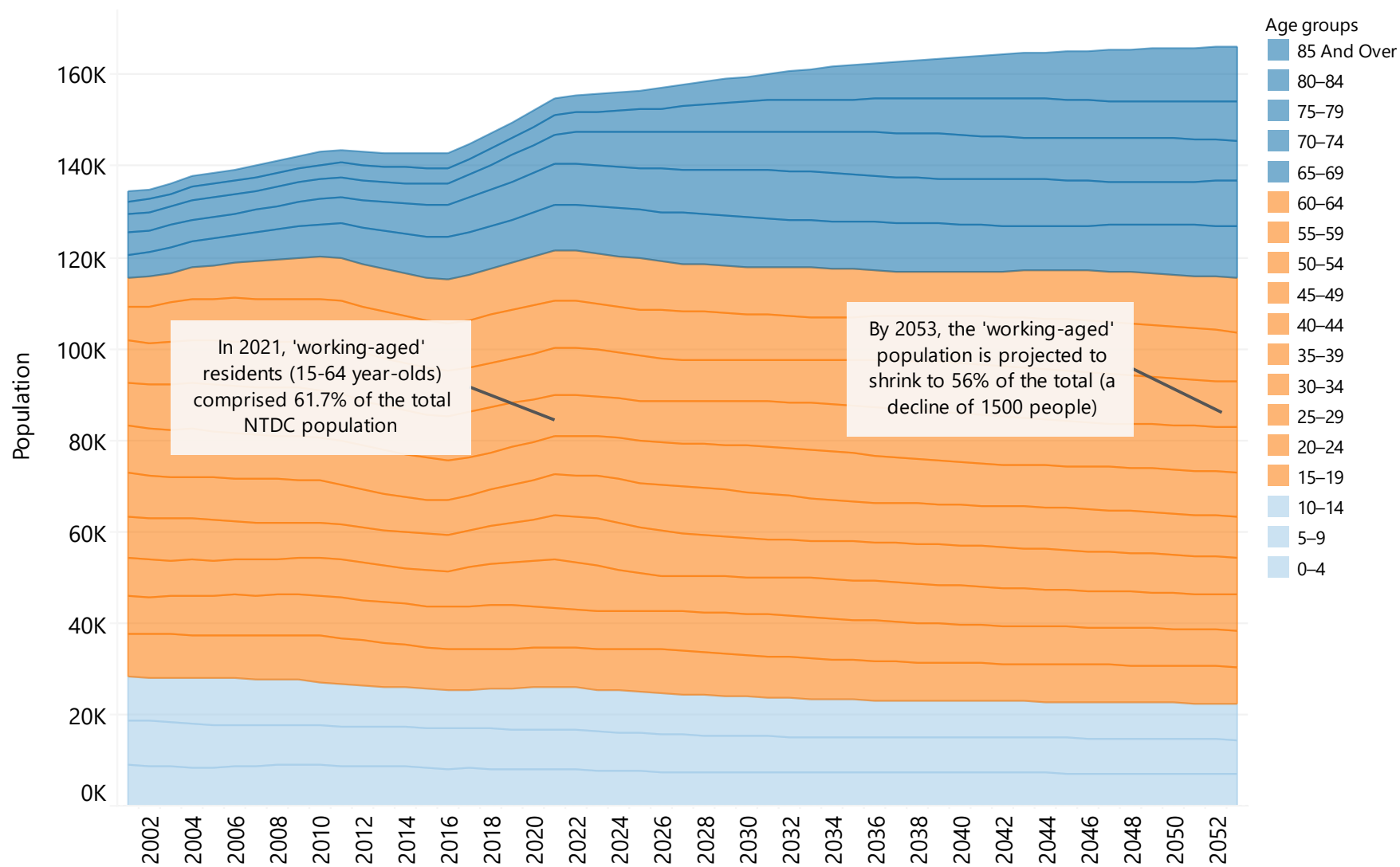
Rapid population ageing also has clear and pressing implications for young people and people of working age, whose relative share of the population is expected to contract throughout the projection period. This means for every child and older adult in a community, there will be progressively fewer working-age people. As a result, the relative burden falling on working-aged people to care for and support the region’s non-working-age population will increase. This relationship between working-age people, young people and children, and older non-working people is often expressed by demographers as an ‘[age dependency ratio](#)’, which can give a useful indication of the likely sustainability of service and care provision in a community. Across Northern Tasmania, age-dependency ratios are forecast to rise – dramatically in some places.

Table 14: Working and non-working age population projected in 2053. Source: [TasPOPP](#).

	Working-age population in 2053	Non-working-age population in 2053	Age dependency ratio
Break O’Day	3,564	4,231	118.7
Dorset	3,246	3,012	92.8
Flinders	374	521	139.3
George Town	3,700	3,679	99.4
Launceston	44,870	30,146	67.2
Meander Valley	12,195	10,853	89.0
Northern Midlands	8,385	7,153	85.3
West Tamar	16,750	13,456	80.3
Northern Tasmania Total	93,085	73,051	78.5

As already noted, some of these age-dependency ratios may simple be too high to ever materialise in the reality of a small and remote Tasmanian community like Flinders Island, for example. Nevertheless, they provide a concerning insight into the labour force imbalances that population ageing will inevitably bring and reinforce the vital importance of migration to the sustainability of the Northern Tasmanian population.

Figure 32: Population by age group in Northern Tasmania, 2001-2053. Source: [TasPOPP](#).



Key insights

- Population projections are potential long-term population implications of different sets of assumptions and should not be understood as a forecast or prediction.
- Under the medium series projection scenario, much of the growth will be in the coming decade, leading to changes in the distribution of population in Northern Tasmania.
- The median age of Northern Tasmanian population as a whole is projected to increase by 7 years, to 50. Some areas will age more than others (i.e., Flinders and Break O'Day), although it is likely that aging populations in more regional areas will move to places where they are able to receive adequate services.
- As a result of population ageing, the relative burden on working-age residents will increase – further highlighting the critical importance of migration policy settings.

Discussion questions

1. How can Northern Tasmania mitigate or plan for the impacts of rapid population ageing, particularly in regional areas?
2. If the Tasmanian Treasury's population projections do eventuate, what will be the impacts on local service provision, infrastructure, and community wellbeing?
3. What can be done to prepare Northern Tasmania's for a future in which there are fewer residents of working age (decline workforce dependency ratio)?

What we heard from workshop participants

1. Infrastructure and innovative service provision to support ageing-in-place

Infrastructure investment was raised as an issue in almost all workshop discussions, but access to telecommunications and transport infrastructure to support ageing-in-place in regional communities was perhaps the most prominent and consistent theme. This included access to general practice and specialist services (including via telehealth), the availability of transport options to access services in other cities where required but also to help people remain connected to their communities.

2. The importance of skilled workers and skilled migrants in supporting the aging population

If projected population ageing does eventuate in regional communities, retention of skilled migrants in key labour shortage areas will be even more important than it already is. Participants recognised the vital importance of adequate housing, welcoming communities, and appropriate cultural supports to ensure that skilled migrant workers are attracted to, and remain in, regional communities whose ageing populations are putting a greater strain on their health and social care workforces.

6 Northern Tasmania’s future population: Challenges, opportunities, and strategies

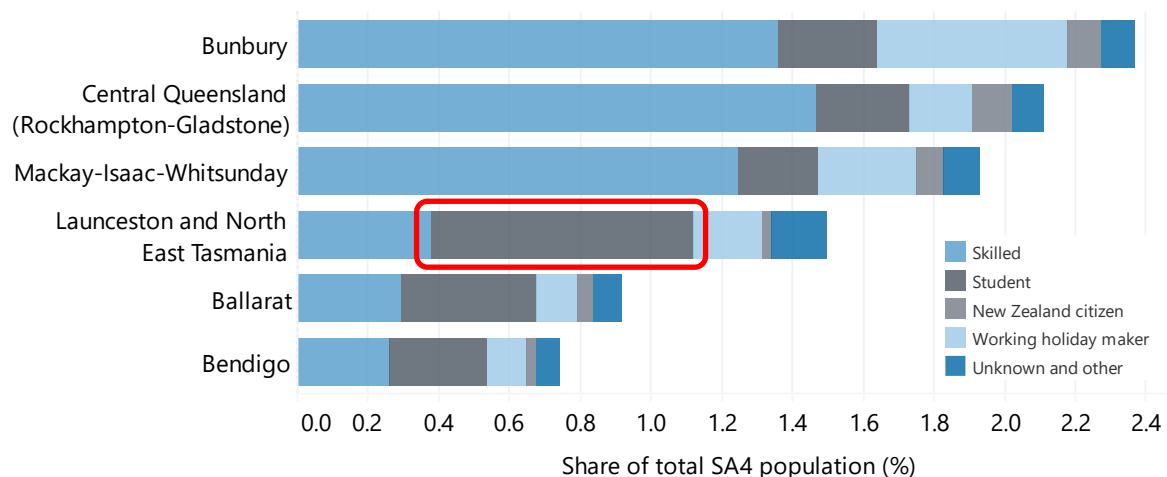
The data presented in this report highlight some clear challenges to sustainable growth and distribution of Northern Tasmania’s population. However, these challenges are not insurmountable and, more importantly, they are not the whole story: Northern Tasmania enjoys some crucial strengths and opportunities to deliver more sustainable long-term growth and distribution of its population.

These opportunities are all essentially about turning the region’s greatest assets – liveability and amenity – into targeted retention strategies for key cohorts. Population strategy is both about shaping future population trends where it is possible to do so and planning for them where it may not be. Addressing the challenges and capitalising on the opportunities identified here should be central considerations in Northern Tasmania’s next population strategy. Broadly speaking, these efforts should be focussed around four critical themes.

1. The importance of international migration and retention

It is often assumed that international students do not contribute to sustainable population growth in regional areas because they move on to bigger metro labour markets when they graduate or gain permanent residency. This is not the case in Northern Tasmania. As Figure 32 shows, Northern Tasmania retains between twice and three times the number of its international students as a share of total population than similar regional areas on the mainland.

Figure 33: Retention (5+ years) of temporary entrants who have gained permanent residency by former visa sub-class, selected SA4s, 2021. Source: ABS.



While this retention of overseas students is heartening, the same cannot necessarily be said for skilled migrants. Given the importance of education and training to productivity, incomes, output, and wealth generation, both students and skilled migrants deliver disproportionate benefit to regional economies. If Northern Tasmania increased its retention rate for skilled migrants by even a small amount, the cumulative impact over the coming years and decades would be transformative.

2. Structural ageing and its regional distribution

Over the past decade, the population of Northern Tasmania has continued to get older and, in many individual areas, the rate of population ageing has increased. Population projections show that, without changes to rates of migration or fertility, this trend will continue. The geographical distribution of population ageing is highly uneven. More rural and remote parts of Northern Tasmania, and in particular the Flinders and Break O’Day LGAs, are projected to experience rapid ‘hyper-ageing’ that would almost certainly prove unmanageable for these areas’ dwindling working-age populations. As a result, projected population ageing in these places is more likely to manifest as population decline driven by an inability to access local services.

3. Settlement patterns of young people and families

With the exception of the East Coast, many of Northern Tasmania’s fastest growing areas are also its youngest. Even better, a number of these areas are getting younger. From 2016 to 2021, the median age of Westbury fell by three years. Riverside and Legana both got two years younger over the same period, while Waverley-St. Leonards and Hadspen-Carrick both got one year younger. The growth and age change seen in these regions in recent years points to a key emerging trend in the distribution of Northern Tasmania’s population: the movement of younger ‘early-career’ employed people (many with families) to formerly regional areas surrounding greater Launceston. Capitalising on the employment, lifestyle, amenity, and housing market conditions that have enabled such strong growth among young Tasmanians offers the possibility of a more sustainable future population for other regional communities farther from Launceston as well.

4. The impacts of population churn

Population turnover, or ‘churn’, is having a pronounced impact on the region’s profile of skills and education, incomes, median age, and service provision need. More specifically, the data presented here show that compared with long-term Northern Tasmanian residents, recent arrivals and former residents who have moved elsewhere are typically younger, healthier, earn more, are more skilled in their jobs, and are less likely to require assistance with core day-to-day activities. If population ‘churn’ is at a manageable level and the characteristics of incoming and outgoing cohorts are similar, these differences are not necessarily a problem – indeed they are probably advantageous. However, the data show that, on balance, people leaving Northern Tasmania are younger and earn more than those who are arriving, which suggests that churn is instead contributing to a net ‘drain’ of skills and income.

How can Northern Tasmania manage its population challenges and maximise opportunities for sustainable growth?

The rate and geography of population change in Northern Tasmania over the past decade clearly align with one of the key insights of demography and population research highlighted in Part 2 – namely, that it’s not all about employment. This is demonstrated by the fact that since NTDC’s last population strategy, the region has far exceeded its target for employment growth but fallen well short of its target for population growth. Instead, the factors that underpin population change in Northern Tasmania – and which will continue to do so in the future – are lifestyle, amenity, liveability, and place attachment.

This means that Northern Tasmania's next population strategy should be focussed squarely on four key elements:

- The first of these is the infrastructure, place assets, and community connections that underpin liveability and build place attachment. In particular, creating an enabling environment for hybrid working arrangements will allow the benefit of growth among 30–44-year-olds with young children to be spread more widely throughout the region.
- The second is retention of new arrivals (especially skilled migrants and students). Strategies that help migrants build strong local networks and gain employment that befits their skills could help turn people at risk of moving elsewhere into long-term residents.
- The third is to invest in the necessary infrastructure planning and innovative service delivery arrangements to support ageing in place for the populations of coastal lifestyle communities in rural and regional areas.
- The fourth is planning for the implications of major renewable energy projects in Northern Tasmania. Unless carefully managed, the skilled and specialist workforce needs of projects in Bell Bay in particular (which are often met via long-distance commuting or 'FIFO' labour) could increase population turnover and exacerbate its impacts.

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8 Appendix

A. Visa planning allocations

Table 15: Visa planning allocations announced as part of the respective year's budget. Adapted from [Home Affairs](#).

Visa Stream	Visa Category	Description	2023-2024 Planning Levels	2024-2025 Planning Levels
Skill	Employer Sponsored	This is one of the pathways for temporary migrants to secure permanent residence through the Temporary Resident Transition Stream.	36,825	44,000
	Skilled Independent	This is for invited workers, eligible New Zealand citizens, and eligible Hong Kong or British National (overseas) passport holders with skills we need, to live and work permanently anywhere in Australia. ⁹	30,375	16,900
	Regional	For skilled workers who want to work and live in regional Australia.	32,300	33,000
	State/Territory Nominated	These categories aim to allow jurisdictions to attract skilled migrants to meet jurisdiction and area specific skill needs.	30,400	33,000
	Business Innovation & Investment	From July 2024, new applications for this visa will no longer be able to be lodged, following the Migration Review. Instead, a new National Innovation Visa will be available at the end of 2024.	1,900	1,000
	Global Talent (Independent)	This will transition to the National Innovation Visa, with existing applicants moved to the new stream but assessed against the eligibility criteria at the time of their application.	5,000	4,000
	Distinguished Talent	For those who have an internationally recognised record of exceptional and outstanding achievement in an eligible field – this	300	300

⁹ But note the New Zealand stream closed to new applications on 1 July 2023 (see [here](#)).

		has been closed to new applications, and applicants are directed towards the Global Talent visa.		
	Skill Total	This stream is designed to increase economic productivity, and to fill skill shortages in the market.	137,100	132,200
Family	Partner	This is demand driven, so the number given is an estimate for planning purposes.	40,500	40,500 (estimate)
	Parent		8,500	8,500
	Child	This is also demand driven.	3,000	3,000 (estimate)
	Other Family		500	500
	Family Total	This stream is predominantly made up of partner visas, enabling Australians to reunite with family members from overseas. This pipeline has some flexibility to align itself with demand, as they recognise the social, economic and demographic benefits of family reunification, particularly the partner visa.	52,500	52,500
	Special Eligibility	This covers visas for those in special circumstances (such as permanent residents returning to Australia after a period overseas).	400	300
	Total Migration Program		190,000	185,000
State/Territory Nominated Visa Category	Tasmania	This is the number of new primary applicants each state or territory can nominate in a program year, which are then added to the existing on-hand caseload in these visa categories. This does not reflect the total number of visa applications, and does not limit the number of visas able to be granted in these categories. This category aims to allow jurisdictions to attract skilled migrants to meet jurisdiction and area specific skill needs. More information about the eligibility criteria for Tasmania can be found here: www.migration.tas.gov.au/		Skilled Nominated (subclass 190) 2,100 Skilled Work Regional (Subclass 491) 760