Building population resilience in Tasmania

The pandemic and beyond

SUMMARY REPORT

Research report for the Department of State Growth
Prepared by the Institute for Social Change, University of Tasmania – June 2022

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Amid so much uncertainty, it is difficult to grasp the full impacts of the pandemic and make predictions for what might occur in the future. While some aspects of life remain unchanged by the pandemic, the day-to-day lives of most Australians have changed to some extent. These changes, ranging from regular COVID testing and hand sanitising to career changes and regional moves, are having and will continue to have significant impacts on the size, composition and geographic distribution of the Tasmanian population. These changes, in conjunction with other pandemic impacts and pre-existing economic and social conditions, have implications for the health and quality of life of Tasmanians.

This research and report was commissioned by the Tasmanian Department of State Growth to inform an update to Tasmania’s Population Strategy in light of the impacts of COVID-19. It builds on and extends the findings of the Institute for Social Change’s 2020 report, ‘Strategic policy responses to population decline: A synthesis of regional approaches and outcomes with policy recommendations for consideration from a Tasmanian context’ and 2021 case study ‘Building future population resilience – A case study on the COVID-19 pandemic’.

This report addresses the following key questions:

1. In light of the revised population projections, what are the key influences likely to be over the next five, ten years and beyond?

2. What are the key changes arising out of 2020/2021 and amid COVID-normal that are impacting liveability in Tasmania?

3. How might Tasmania best leverage the opportunities arising to retain residents and attract migrants from interstate and overseas to sustain the population and support growth?

4. In the context of the above, are the three pillars of Tasmania’s Population Growth Strategy of job creation and workforce development, migration and liveability still fit for purpose? How might they need to be adapted?

To address these questions, we examine how the pandemic has impacted projected and actual population size and composition for Tasmania by examining the different components of population change: fertility, mortality, interstate migration, and overseas migration, and their implications for key population issues such as ageing. We examine liveability in Tasmania – in particular, the factors that help and hinder the attraction and retention of Tasmanian residents – as well as trends in liveability arising from the pandemic. Next, the perceptions of Tasmania among residents and those on the mainland are examined.

We then synthesise the findings about population change, liveability, and perceptions of Tasmania. Finally, we detail the implications of this report for the Tasmanian Population Growth Strategy 2015.

The report includes an addendum that was prepared to update key findings and recommendations based on an analysis of key variables published in the 2021 Census data. The addendum describes several important findings that have implications for the report, including an increase in Tasmania’s population when compared to the ABS quarterly estimates for 2016-2021 and increasing levels of cultural diversity in the Tasmanian community.
COVID-19 in Tasmania

Understanding the impact of the pandemic on population and liveability in Tasmania requires consideration of the COVID-19 context. It is important to note that, relative to larger states such as New South Wales and Victoria, Tasmania was largely sheltered from the worst impacts as experienced by these states over 2020 and 2021, where outbreaks and extended lockdowns were frequent.

A short but severe outbreak in the northwest of the state early in the pandemic resolved the Tasmanian Government and the populace to strict measures, particularly around closure of the border and quarantine requirements for those entering, to keep the virus at bay. Though there were undoubtedly severe impacts on people and industries arising from the public health measures, the Tasmanian economy performed well throughout 2020 and 2021, and many individuals were supported by federal government wage subsidies and income support supplements.

This year has seen a major shift in the approach to COVID-19 management. The borders opened in mid-December 2021 and public health measures have gradually lifted since. Case numbers have been very high, with per-capita cases in Tasmania second only to New South Wales at the time of writing. However, attributable to high vaccination rates and possibly the continued vigilance of the population, deaths per capita in Tasmania (as at 12 May 2022) are the second lowest in the nation, behind WA.

Accordingly, this report is written in so-called ‘COVID-normal’ times, with few mandated public health measures and most people returning to pre-pandemic life. Despite Tasmania’s relative insulation from the worst of the pandemic, the pandemic has served to create and exacerbate challenges to life in Tasmania, as well as reveal significant opportunities for the future.
Population changes

POPULATION GROWTH
Population growth is determined by three main components:

**Natural increase**
The number of births in a population, minus the number of deaths.

**Net interstate migration**
The number of new residents arriving from interstate, minus the number of residents departing to live in a different state.

**Net overseas migration**
The number of new residents arriving from overseas, minus the number of residents departing to live in a different country.

Chapter 2 examines changes to Tasmania’s population size and composition over the past decade and actual and projected impacts of the pandemic on Tasmania’s population.

Tasmania’s population growth over the last decade can be categorised into three periods: low growth, between 2012 and 2015; rapid growth, between 2016 and 2019; and the pandemic period, 2020 and 2021, in which the population stagnated.

The sources of population growth have differed in each of these periods: natural increase and net overseas migration were positive contributors to population growth between 2012 and 2015 while net interstate migration was negative (more Tasmanians moving interstate than mainlanders moving to Tasmania). The rapid growth period, 2016–2019, saw natural increase remain relatively steady while net interstate and overseas migration increased drastically. The pandemic period, in particular 2021, saw a decrease in population arising primarily from net negative interstate migration.
Population changes

PANDEMICS

Pandemics can directly affect population size in several ways:

Fertility
Higher health risks for mothers and infants, along with general economic uncertainty, can lead to (voluntary) delays in having children. There is limited evidence that this will be the case in Australia, with some early data on prenatal services and hospital bookings indicating that fertility may increase. However, the overall impact on population size in Tasmania from fertility changes is likely to be marginal.

Mortality
Significant health crises can create excess mortality and lead to lower life expectancy (e.g., life expectancy in the USA has decreased an average of 1.13 years as a result of COVID-19). Though COVID-19 deaths in Australia and Tasmania are of concern; at a population level, at present, they are not anticipated to affect population size.

Interstate and overseas migration
Much like fertility, migration can be affected by the uncertainty and restrictions brought about by pandemics, such that people forego or delay moves. This has certainly been the case for Tasmania, with net interstate and overseas migration decreasing dramatically in 2020 and falling to negative in 2021 (more departures than arrivals). Interstate migration is expected to return to pre-pandemic levels by 2022/23, and (national) visa approvals data indicate that overseas migration is recovering.

The Australian Government Centre for Population projects that Tasmania’s population will be 589,400 by the end of 2032 (from 542,400 at the end of 2021). While the ABS have yet to update their population projections to account for COVID-19, some projections in the academic literature suggest that Tasmania can expect its population in 2040 to be 3.5% lower than if the pandemic had not occurred.

POPULATION COMPOSITION

Two major considerations for Tasmania (and, indeed, Australia) in terms of population composition are age and geographic distribution, as these have substantial impacts on service and infrastructure needs.

Tasmania has an older population relative to Australia, and it has been steadily ageing both numerically (mean and median age) and structurally (proportion of the population over 65) over the past decade. Due to the reduction in interstate and overseas migration, the pandemic saw the fastest annual increase in age in Tasmania in the past decade. At the national level, some projections suggest a 1% increase in the proportion of the Australian population in 2040 aged over 65, relative to pre-pandemic projections.

Nationally, much has been made of migration from capital cities to the regions, particularly around the impact on regional house prices. In Tasmania, the number of people migrating from Hobart to the Rest of Tasmania grew steadily from 2015, overtaking the number of people moving the other way (from the Rest of Tasmania to Hobart) in 2019 and 2020. At the same time, interstate arrivals to the Rest of Tasmania were higher than interstate arrivals to Hobart. Therefore, the population of the Rest of Tasmania has increased and is projected to continue to increase. However, once overseas migration is taken into account, the population of Hobart is expected to grow at a faster rate than the population of the Rest of Tasmania.
Economic conditions

Economic conditions play a key role in population attraction and retention, such that people assess the relative economic conditions of a place and how those conditions may affect their quality of life. Accordingly, Chapter 2 also examines economic conditions in Tasmania over the past decade relative to Australia, and considers how these may affect population projections. In summary, we find:

- Australian Gross Domestic Product (GDP) and Tasmanian Gross State Product (GSP) per capita gradually increased between 2012 and 2019. Growth in Tasmania was greater (7.8%) than in Australia (6.2%), leading to a decrease in the relative GDP-GSP gap from 24.1% in 2013 to 19.6% in 2021.
- After an increase between 2012 and 2013 (to about 8%), the unemployment rate in Tasmania (among the working age population) was slowly and gradually decreasing until early-2020. Between 2015 and 2018 there was a negligible gap between the Tasmanian and Australian unemployment rates. After a slight increase in the gap between the unemployment rates in 2019, Australia’s and Tasmania’s unemployment rates have been similar since 2020.
- Weekly earnings consistently grew in both Tasmania and Australia between 2012 and 2021. The relative gap in average weekly earnings between Tasmania and Australia gradually decreased over time from 13.3% in 2012 to 12.1% in 2021. However, the average full-time salary in Tasmania in 2021 was equivalent to the Australian average in 2016.
- Cost of living in Hobart, measured by the Consumer Price Index (CPI), followed a similar trend to Australia between 2012 and 2021. However, more substantial increases in health and housing costs have been observed in Hobart than in Australia.
- Relating the above trends to population change, there is limited evidence that economic conditions have affected population change in Tasmania. The recent increase in interstate departures may be driven by cost of living rising at a faster rate in Hobart than in Australia overall.

Liveability

A liveable place is somewhere that is ‘safe, attractive, inclusive, and environmentally sustainable; with affordable and diverse types of housing, public open space, local shops, health and community services, leisure and cultural opportunities; with opportunities for employment and education all accessible by convenient public transport, walking and cycling’ (Lowe et al. 2013).

Analysis of 2018 data against the Australian Urban Observatory’s liveability index found that, compared with Australia’s 19 other largest cities, Hobart and Launceston performed relatively well on housing affordability, alcohol environment (average distance to an off-licence alcohol outlet, where larger distances are considered better) and access to local employment, but relatively poorly in terms of access to social infrastructure such as childcare and healthcare.

The pandemic has led to several changes in the way people live their lives, how businesses and industries operate, and in the supply and utilisation or consumption of infrastructure, goods and services. Chapter 3 examines these trends, categorised into adaptive lifestyles, adaptive industries, and essential infrastructure, goods and services, and considers their impacts on liveability in Tasmania. The trends and liveability impacts in each category are summarised in the tables below.
## Adaptive Lifestyles

Pandemics can directly affect population size in several ways:

<table>
<thead>
<tr>
<th>Key trends</th>
<th>Impacts on liveability</th>
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| Higher rates of working from home that are likely to persist. | • Changes to where people can and want to live is increasing demand for certain types of housing, particularly in regional areas, exacerbating existing affordability and supply issues.  
• Working from home has been shown to have both positive and negative impacts on individual wellbeing.  
• People will use infrastructure differently, for example, reduced demand for peak hour public transport and increased demand for high-speed internet with good coverage in regional areas.  
• The function and vibrancy of urban / commercial centres may be reduced if there are less workers and businesses based there.  
• It is important to note that many roles in Tasmania’s most prominent employing industries (e.g., healthcare and social assistance) cannot be performed from home. Accordingly, the work from home trend may be less pronounced than in other states. However, it is still a major change for many workers. |
| Changes to the way and how frequently people are accessing goods and services and engaging in recreational activities. Increased online activity and avoidance of certain activities are likely to persist. | • Accessibility of goods and services may increase, especially for people living in areas where services are limited and typically hard to get to.  
• High rates of digital exclusion in Tasmania suggest that accessibility will be decreased for some people, especially if there is a transition to and reliance on online modalities.  
• Individual wellbeing may decline for those avoiding social interactions. |
| Adoption of some sustainable lifestyle behaviours, though it is unclear if these will remain in the long-term | • Preservation of the natural environment.  
• Increased efforts to access to healthy food and general improvements in health.  
• Increased appreciation of ready access to nature in Tasmania among residents, and possibly prospective residents. |
| Increased access to and appreciation of public open space and the natural environment. | • Improved individual and community wellbeing. |
## ADAPTIVE INDUSTRIES

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<tbody>
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<td>Several vulnerable industries (many overrepresented in Tasmania) have been negatively impacted during the pandemic, however there are signs of recovery.</td>
<td>• As pandemic recovery is uneven across industries, and Tasmania has an overrepresentation of vulnerable industries, workers in some industries may have lost work and/or struggle to find more.</td>
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<td>A range of industries have rapidly adopted digital technology, reflecting the need to adapt during the pandemic and accelerating existing trends.</td>
<td>• Similarly, several businesses have closed and new entries have slowed, and some still may scale back or close, affecting the availability of local goods and services.</td>
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<td>Several skills and labour shortages have emerged across the Tasmanian economy in key areas such as agriculture, tourism and hospitality, and health, social and community care, and construction.</td>
<td>• Decreased employment and activity in certain industries, such as arts and recreation services and accommodation and food services, may reduce cultural amenity.</td>
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<td>Supply chain disruptions have made certain goods and services (e.g., building materials and food) more expensive and harder to access, however these impacts are likely to ease as global markets return to 'normal'.</td>
<td>• Is likely to facilitate greater rates of remote work across more industries, however, those with low levels of digital literacy may struggle with new requirements in the workplace (or even be displaced by new technology) and this in turn may impact employment, income, and wellbeing.</td>
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<td>• The digital divide may increase, as those who are digitally included reap the benefits of increased digitisation in both their work and consumption, and those who are digitally excluded fall further behind.</td>
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<td>• Businesses that do not 'keep up' may struggle to remain competitive and this may impact their viability, especially if new businesses enter the market from outside Tasmania.</td>
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<td>• The liveability implications, should there be insufficient people to perform essential functions in the community, are far-reaching. Given that the pandemic has placed immense pressure on the health system and exacerbated housing shortages, skills shortages in these areas may result in worsening health outcomes for the Tasmanian population and further decrease access to affordable housing.</td>
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<td>• Ongoing issues obtaining building materials (as well as soaring costs) are likely to exacerbate housing issues in Tasmania for some time, as there is likely to be a backlog of work after the extended period of limited supply.</td>
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<td>• Food insecurity emerged as a key issue for Tasmania during the pandemic. Any future issues with food supply chains may contribute to increased food insecurity, which is likely higher than pre-pandemic levels due to compounding issues such as inflation.</td>
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### ESSENTIAL INFRASTRUCTURE, GOODS AND SERVICES

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| Exacerbation of housing supply and affordability issues, particularly in regional areas which have experienced unprecedented population growth. | • As housing affordability decreases, Tasmanian residents may be forced to spend a greater proportion of their household income on housing to stay in their current neighbourhood or be priced out of the area altogether.  
• With demand for housing far exceeding supply, people may not be able to find the right kind of housing to meet their needs (e.g., older people wanting to downsize, people with growing families needing something bigger and close to local schools). This is likely to have several negative impacts on individual and community wellbeing, education, access to services, employment, income, and many other liveability factors.  
• The capacity of regional areas experiencing increased population growth and demand for housing in terms of public infrastructure and essential services is likely to be exceeded and impact the ability for residents to meet their basic, day-to-day needs. |
| Rapid uptake and ongoing utilisation of telehealth services that is likely to persist. | • Improved access to healthcare for those otherwise limited in ability to attend physical appointments (e.g., living in areas with limited services, individuals with limited mobility, etc.)  
• Declines in access to and quality of healthcare for digitally excluded community members. |
| Avoidance/delays in accessing healthcare out of fear of catching/spreading COVID-19, however it is not clear if or to what extent this is continuing. | • Increased strain on primary health services as people seek to address their ‘backlog’ of health concerns and checks.  
• The possibility of increased demand for acute care linked to reductions in early detection and delayed treatment / management.  
• Worsening individual and population health outcomes. |
| Increased loneliness and social isolation especially among older people. | • Decreased individual wellbeing and sense of community.  
• Increased need for COVID-safe means of connection (e.g. outdoor community events, outdoor public spaces)  
• May contribute to increased burden of disease and place further pressure on health system. |
## Essential Infrastructure, Goods and Services

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| New opportunities and ways for communities to connect that may have increased social cohesion. | - Emergence of smaller, place-based initiatives that increase community wellbeing. Some of these, such as community gardens, can fulfill multiple needs (e.g., food security, social interaction and meaningful occupation of time).  
- Among those who are digitally included, online neighborhood groups (e.g., Facebook groups, Nextdoor) may have enhanced sense of connection to community, increasing their wellbeing and desire to stay in and contribute to their neighborhood. |
| Exacerbation of workforce shortages of GPs, aged care workers and childcare workers. | - Healthcare and childcare are major weaknesses for Tasmania, both in terms of liveability scores and (current and prospective) residents’ perceptions. The pandemic further exacerbating these issues may lead to issues attracting and retaining residents. |
| Increased rates of studying from home and a decline in international University students. | - Flexible study options may increase accessibility of education for Tasmanians, and thus contribute to educational attainment.  
- Studying from home and continued online education may change students’ housing preferences towards larger dwellings. This may be partially mitigated by the provision of quality public places such as libraries.  
- The decline in international students contributed to an increased rate of population ageing during the pandemic. |
| Acceleration of shift away from residential aged care. | - Increased demand for home-based care is likely to further exacerbate housing supply issues.  
- Individual and community wellbeing may improve if the quality of the home-based care is high and the necessary services and infrastructure that support older people to ‘age in place’ is sufficient. |
| Sustained demand for childcare, but access and affordability an ongoing concern. | - Limited access to childcare can impact individual employment and income, particularly through decreases to female workforce participation, and can also impact educational outcomes for the child.  
- In more remote areas, an inability to access childcare is likely to be a barrier for someone deciding to live or stay in that area, which would have far-reaching impacts on the liveability of the town. |
Perceptions of Tasmania

There are core subjective elements to liveability, such that only the individual can decide what they like about where they live and, ultimately, whether to stay. Accordingly, Chapter 4 examines people’s opinions about the life in Tasmania and attitudes towards Tasmania (of both Tasmanian residents and residents from the mainland). We find:

- There is little difference between Tasmania and Australia in terms of average satisfaction with different aspects of life among respondents to the Household, Income and Labour Dynamics in Australia (HILDA) survey. Tasmanians are slightly more satisfied with their financial situation, feelings of safety, and overall life, and slightly less satisfied with their health.

- In February/March 2022, respondents to a survey conducted by The Tasmania Project (TTP6) were most satisfied with the natural environment, education, and housing and least satisfied with civic engagement, jobs, and income. Of these, respondents ranked housing and income as the most important dimensions for wellbeing.

- Health, life satisfaction, housing, and income were identified as the top areas of concern for the future (defined as 3 years’ time) by respondents to TTP6.

- The strongest “place associations” for Tasmania as identified by a sample of mainland Australians were related with the natural environment and lifestyle, and the weakest were related to entertainment, arts and culture, and the economy and labour market.

- In qualitative interviews, young Tasmanians reported being connected to and valuing the natural environment and their local communities and were generally concerned about housing.
Implications for population retention and attraction

While it is difficult to predict population movements, particularly given the high levels of local and global uncertainty, social and economic trends and Tasmania’s unique context, the pandemic presents several challenges and opportunities for the retention and attraction of people to Tasmania. These are examined in Chapter 5 and summarised below.

CHALLENGES

Income and cost of living
The persistent gap in average earnings between Tasmanian and Australian workers is a factor that reduces Tasmania’s relative appeal to people of working age. Costs of living that are rising faster than Australia’s, particularly in large and inflexible household budget items such as housing, serve to make Tasmania unattractive and even untenable for prospective and existing residents.

Housing
Housing affordability is a key issue, as growth in house prices and rental unaffordability are both higher in Tasmania (particularly Hobart) than in Australia. While affordability disproportionately affects younger people and those on low incomes, supply-side issues (which are likely to persist due to material shortages and soaring costs) also affect older residents’ ability to meet their housing needs (e.g., smaller dwellings).

Employment
While the overall unemployment rate in Tasmania is in line with Australia, there are concerns that there are not enough jobs available in Tasmania that offer the promotional and developmental opportunities sought by workers, particularly younger workers.

Interstate departures
Net interstate migration turned negative in 2021, such that departures overtook arrivals. This trend should be monitored, as it has implications for population size and composition (e.g., if younger people are disproportionately represented in departures, structural ageing can increase).

Perceptions of Tasmania
The perceived poor quality of healthcare, economic opportunities and cultural amenity (e.g., entertainment) hampers the attraction of new residents and may be a driver of attrition among existing residents. There are also key gaps between the perceptions and realities of Tasmania, both positive and negative. For instance, the prominence of Tasmania’s art and culture scene (often referred to as the “MONA effect” or consequences of it) is a key tourism drawcard and point of pride for residents, yet mainlanders do not think of Tasmania as culturally vibrant. On the other hand, people who move here for pristine, ‘untouched’ nature may be surprised by traffic congestion and conservation worries.

Ageing population
Tasmania’s ageing population is a challenge with regard to ensuring that there are enough workers to support the needs of an ageing cohort, as well as support other industries.
OPPORTUNITIES

Strategic interstate and overseas migration

Targeting migration into industries with skills shortages, enhancing communication about and marketing of Tasmania, and ensuring that migrants (overseas and interstate) are able to embed into communities (e.g., by fostering expat communities; increasing cultural amenity) will help to attract and retain residents that fulfil the needs of Tasmania.

Protect the natural environment and access to it

Another unique selling point of Tasmania, the importance of the natural environment has only been increased by the pandemic as people spend more time outdoors and some seek more sustainable lifestyles. Protecting the natural environment and people’s access to it is critical to maintaining one of Tasmania’s core drawcards.

Strengthen local food systems

The pandemic exposed significant issues with food supply and affordability in Tasmania, with high rates of food insecurity. Strengthening local food systems would facilitate increased affordability and increased food justice, reduced food waste (aligning with Tasmania’s environmentally conscious brand) and reduce the ‘perceptions-reality’ gap between Tasmania being a foodie destination and many residents not being able to access and afford food.

Support new ways of working

Working from home and increased digitalisation of many aspects of work mean that, supported by state and federal governments, Tasmanian industries will have to adapt in order to remain attractive to workers and consumers.

Harness the creative industries

Cultural and creative industries are a unique selling point for Tasmania (particularly in the context of tourism), yet there is a perception among mainlanders that Tasmania lacks cultural amenity. In addition, cultural industries were disproportionately affected by COVID-19 and can make significant positive contributions to recovery (arguably more so than many industries). Thus, there exists an opportunity for Tasmania to harness the cultural and creative industries to increase liveability and economic conditions for prospective and existing residents.

Increase digital inclusion

Tasmania is the least digitally included state in the country, and this has implications for societal equality and individual wellbeing, which are both critical to prospective and existing residents. Increasing digital inclusion, both by investing in infrastructure and in people’s skills, is therefore a key opportunity.

Embrace the economic and social opportunities of an ageing population

Along with challenges, an ageing population brings opportunities. Positioning Tasmania as an ideal destination to age in place and appreciating and leveraging the unique skills and perspectives of an ageing workforce are also key opportunities for population retention and growth (as well as productivity).
Tasmania's Population Growth Strategy 2015

The Tasmanian Growth Strategy 2015 set a population target of 650,000 by 2050 as a means of addressing population ageing, through 3 pillars: job creation and workforce development, migration and liveability.

In light of population changes since the strategy's release and pandemic impacts, we recommend a comprehensive review that considers:

1. Disparities between regions within Tasmania.
2. How to meet the needs of a structurally and numerically older population and the opportunities associated with an older population.
3. How to manage population change – growth and decline – through planning for change, for example, by developing a settlement plan.\(^1\)
4. Update and review the May 2020 Strategic policy responses to population decline report for the Department of State Growth to capture the economic and social opportunities of an ageing population in the current context.
5. Gaining a much greater understanding of the drivers of migration for specific sub-groups to ensure that Tasmania's offering matches both their needs and Tasmania's needs.

1. Job creation and workforce development

In light of the continued earnings gap between Tasmanian and Australian workers, and the importance of economic conditions to prospective interstate and overseas migrants, there is a strong argument for the retention of this pillar and the objectives underneath it (actively pursue investment, business relocation and job creation, identify and project current and future employment opportunities, and invest in real skills for real jobs). Addressing cost of living and earnings (not just provision of jobs) will be required for these objectives to be achieved. We also argue that an increased focus on younger Tasmanians and prospective residents is indicated.

2. Migration

Clearly, net interstate and net overseas migration are required to achieve the population target. Therefore, we believe that all migration pillar objectives and goals are still relevant and should continue, including to retain our best and brightest, increase engagement with the Tasmanian diaspora and encourage them to return home, actively pursue overseas migration, increase the share of humanitarian entrants, increase numbers of international students, and actively pursue interstate migration. Focus on retention of migrants will also be important.

3. Liveability

Key liveability issues, including housing, health, education, and economic opportunities have become more prominent since the release of the strategy, and thus require greater focus. In addition, there is a place to better understand what Tasmanians value about life in Tasmania to develop a more grounded understanding of liveability and ensure investments are targeted effectively.

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\(^1\)As previously recommended by the Institute for Social Change
Students on a kelp field trip with Cayne Layton at Tinderbox.