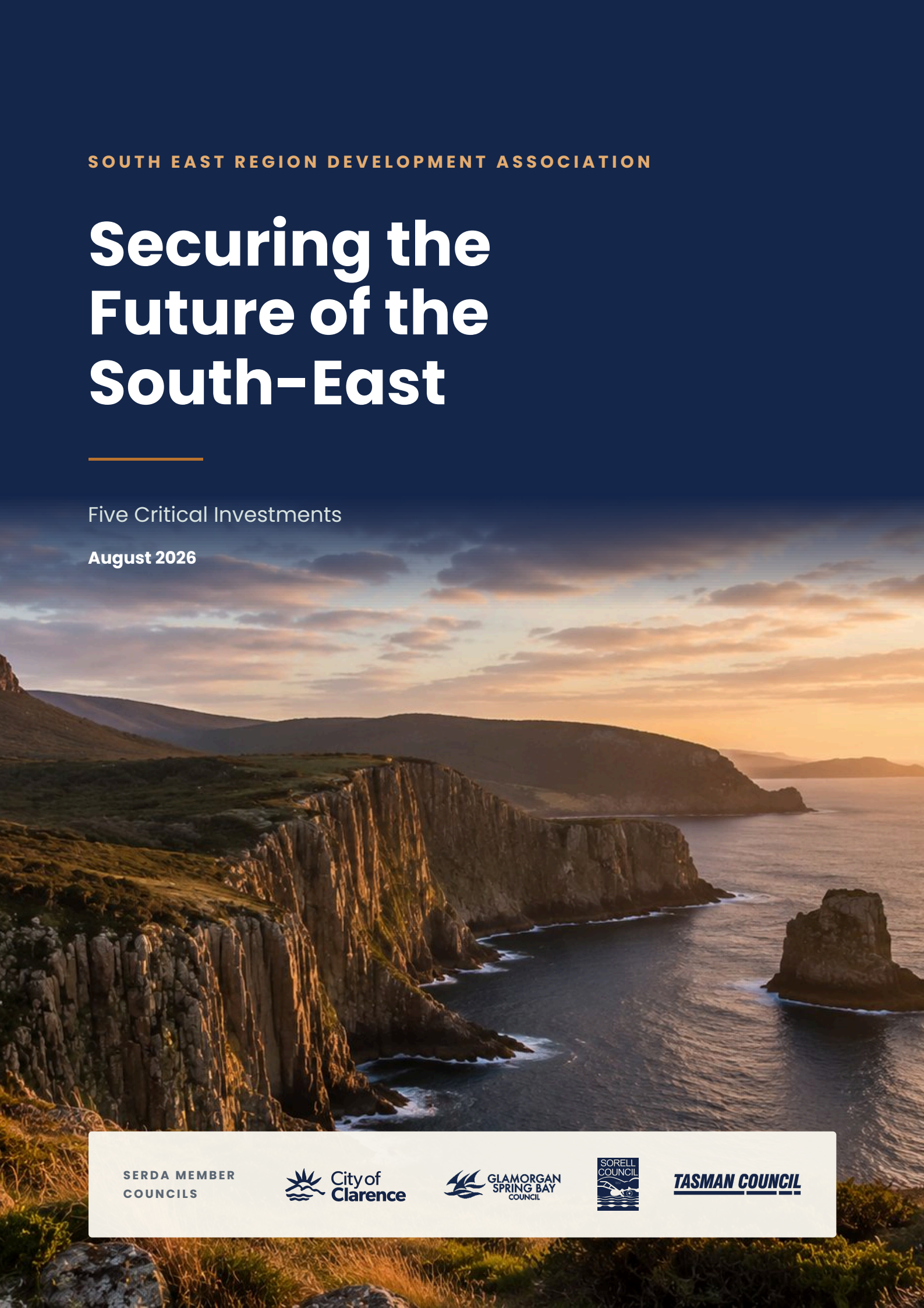
SOUTH EAST REGION DEVELOPMENT ASSOCIATION

Securing the Future of the South-East

Five Critical Investments

August 2026



SERDA MEMBER COUNCILS

City of Clarence

Glamorgan Spring Bay Council

Sorell Council

Tasman Council

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LIST OF ACRONYMS

LGA	Local Government Area (Council)
MTB	Mountain Bike
NVA	Natural Values Assessment
RSIP	Regionally Significant Industrial Precincts
SERDA	South East Region Development Association
SME	Small and Medium Enterprise
STRLUS	Southern Tasmanian Regional Land Use Strategy

SERDA – At a Glance

Critical roles in Southern Tasmania for jobs, workers and population.

90,000	40,000	25,000	19,000	6,000
people call the region home	workers	jobs	commute out to Greater Hobart	commute in from Greater Hobart

Planning and investment to secure ongoing quality of life for a growing population.
Five agreed priority investments to secure the long-term prosperity of the SERDA region.

INVESTMENT BENEFITS

Investment	Productivity	Investment Attraction	Housing	Regional Resilience
East Coast Water Infrastructure	✓	✓	✓	✓
Southern Tasmanian Land Use Strategy	✓	✓	✓	✓
Brighton to Cambridge Freight Link	✓	✓	–	✓
Wielangta Forest MTB Trail	✓	✓	–	✓
Digital Connectivity Upgrades	✓	✓	✓	✓

Executive Summary

15.4%
of Tasmania's population

6.2%
of Tasmania's land mass

1.6M+
visitor nights a year, east coast

The SERDA region is a critical part of Tasmania's economy and society. The four local government areas (City of Clarence, Glamorgan Spring Bay, Sorell and Tasman) account for around 15.4% of the state's population and 6.2% of the state's land mass. The region is home to a large population (over 90,000 in mid-2025) and hosts a significant number of visitors, particularly to the scenic east coast, with over 1.6 million visitor nights in Glamorgan Spring Bay and Tasman.

The region hosts important tourism assets like Port Arthur and Richmond, and economic hubs like the Eastlands retail and service precinct, Cambridge industry precinct at Hobart International Business Park, and Hobart International Airport.

The region's economic importance extends beyond the businesses it hosts, as the region is a vital supplier of workers to greater Hobart. Analysis of worker flows shows that almost half of SERDA's workers (19,366) worked in greater Hobart in 2021, emphasising the connectivity between these two important sub-regions. The flows are in both directions, with around 6,000 people commuting into SERDA from greater Hobart as well.

With such an important role in the economic and social connectivity of southern Tasmania, maintaining housing availability and liveability qualities in the SERDA region has benefits for the whole of southern Tasmania. Ensuring quality growth opportunities in the SERDA region into the future will help balance growth and associated pressures across southern Tasmania overall, helping provide ongoing quality of life for residents and workers.

SERDA members have identified five critical investments which will underpin the region's prosperity into the future and ensure its continuing important role in Tasmania.

About SERDA

The South East Region Development Association (SERDA) represents Tasmania's most economically dynamic and interconnected region. Established in 1993 by the councils of City of Clarence, Glamorgan Spring Bay, Sorell and Tasman, SERDA has delivered more than three decades of coordinated advocacy for strategic investment, infrastructure development and initiatives that strengthen the region's economic, social and environmental prosperity.

SERDA's purpose is to foster sustainable social and economic wellbeing across the region through collaboration, advocacy and project delivery. Guided by a vision of being an effective voice to key stakeholders, SERDA works to secure investment, influence policy and advance initiatives that deliver long-term benefits for communities, businesses and future generations. Its strategic objectives focus on growing the regional economy, ensuring the resources required for successful project delivery, and facilitating effective collaboration between member councils to achieve outcomes that benefit the region as a whole.

The SERDA Strategic Plan 2025–2030 identifies four interconnected areas of focus: Economic Prosperity, Infrastructure Development, Environmental Sustainability and Community Wellbeing. Through these priorities, SERDA seeks to support business growth and investment attraction, advocate for critical transport, utility and digital infrastructure, strengthen climate resilience and sustainable land use practices, and foster thriving communities supported by strong education, health and employment outcomes.

As the south-east region continues to experience growth and increasing strategic importance within Tasmania, SERDA remains committed to ensuring regional priorities are understood and supported by all levels of government. By bringing together local leadership, evidence-based advocacy and strong partnerships, SERDA continues to play a pivotal role in shaping a prosperous, connected and sustainable future for Tasmania's south-east.

SERDA's Strategic Economic Role

The region is characterised by significant population growth, internationally recognised tourism assets, productive agricultural land, expanding freight and logistics networks, and a growing role in Tasmania's broader economic future. The region is the gateway to southern Tasmania through Hobart International Airport and offers expanding opportunities for freight dispersal with international flights.

SERDA functions as a regional economic hub, home to around 25,000 jobs and 40,000 workers across southern Tasmania. The region experiences high worker mobility, with almost 20,000 workers commuting outward and 6,000 workers commuting inward daily. This demonstrates its interconnectedness with Greater Hobart and its role as a critical contributor to the state's economy more broadly.

DAILY WORKER FLOWS BY LOCAL GOVERNMENT AREA (2021)

	Clarence	Sorell	Glamorgan Spring Bay	Tasman
Working residents	28,592	7,710	1,972	903
Jobs in LGA	19,078	3,315	1,851	814
Living and working in LGA	9,796	2,186	1,583	628
COMMUTING IN				
From other SERDA	1,678	520	65	129
From Greater Hobart	5,527	376	73	37
From rest of Tasmania	2,086	227	120	56
COMMUTING OUT				
To other SERDA	507	1,720	79	86
To Greater Hobart	16,075	3,060	127	104
To rest of Tasmania	899	263	93	20

Five Critical Investments

SERDA has identified five critical investments to grow the region.

1. East Coast Water Infrastructure Investment

To unlock residential land supply, tourism opportunities and build climate resilience on the east coast, especially Glamorgan Spring Bay.

2. Ongoing Investment in Southern Tasmanian Regional Land Use Strategy

To ensure adequate land is available for residential development and adequate, properly serviced, land is available for employment lands.

3. Brighton to Cambridge Freight Link

To improve transport efficiency, economic productivity and job diversity in the south-east and gain most economic value from two growing employment zones.

4. Wielangta Forest Mountain Bike (MTB) Trail

To establish a nationally distinctive product, Australia's first multi-day wilderness MTB touring trail, extending Tasmania's competitive advantage in the MTB sector and converting pass-through traffic to overnight visitation through a new category of experience.

5. Digital Connectivity Upgrades

To improve small and medium enterprise (SME) competitiveness in the south-east (especially Glamorgan Spring Bay and Tasman which are well below average connectivity) and diversify the economic base and local quality of life (such as reduced commuting) through enhanced work-from-home opportunities.

Investments of Regional Significance

These five investments are supported by all SERDA members. The five investments have been prioritised by SERDA after extensive discussion through 2026, reviewing potential local, regional and statewide benefits, and addressing key infrastructure gaps in SERDA that are constraining balanced growth.

SERDA's Strategic Plan 2025–2030 sets the framework for prioritising these investments:

- Leads to collective benefit (for all four LGAs). This may be a single project or a group of individual projects that are thematically 'packaged'.
- Drives economic benefit, including social improvement.
- Enables SERDA success as an enduring Association.
- Provides for our region's voice to be heard.

SERDA members agree that each investment has benefits for the region – and the state – and also addresses barriers to balanced growth in each local government area. SERDA members are united in supporting this investment mix for the benefit of the region and the state as a whole.

Detailed analysis has been undertaken on the context, issue and benefit of each investment. The key elements are summarised below.

INVESTMENT BENEFITS

Investment	Productivity	Investment Attraction	Housing	Regional Resilience
East Coast Water Infrastructure	✓	✓	✓	✓
Southern Tasmanian Land Use Strategy	✓	✓	✓	✓
Brighton to Cambridge Freight Link	✓	✓	–	✓
Wielangta Forest MTB Trail	✓	✓	–	✓
Digital Connectivity Upgrades	✓	✓	✓	✓

1

East Coast Water Infrastructure Investment

Priority for Investment

SERDA requests state and Commonwealth government funding to deliver priority water infrastructure projects for Glamorgan Spring Bay, aligned to TasWater's East Coast Regional Masterplan (2025). These projects are essential to unlock housing and tourism growth and build climate resilience across the region.

Immediate priorities (by 2035)

- Combine the Orford and Triabunna water systems into a single water treatment plant at Orford.
- Upgrade Bradys Creek Dam to enhance water quality to the Triabunna Water Treatment Plant.
- Construct new water storage and filling station in Bicheno.

Medium-term investigations and delivery (2035–2050)

- Investigate and fund a new dam to replace the Upper Prosser River Dam.
- Investigate and fund upgrades to the Lower Prosser River Dam.
- Investigate desalination as an alternative water security strategy.
- Upgrade Swansea and Coles Bay Water Treatment Plants as required.
- Enhance water security for Coles Bay system using Federals Dam.

Context

Glamorgan Spring Bay is a unique coastal region combining significant agricultural land, small towns (Bicheno, Swansea, Orford, Triabunna), and nationally recognised tourism assets (Coles Bay and Maria Island).

Glamorgan Spring Bay is experiencing migration-driven population growth. The Southern Tasmania Regional Land Use Strategy forecasts growth of 961 residents by 2046, requiring approximately 1,721 new dwellings. This exceeds conservative treasury projections (540 by 2033, 1,270 by 2053) which are based on historical trends and do not account for changing economic circumstances, capital investment, housing availability and affordability, or shifting preferences for permanent housing. The land to accommodate that growth exists. TasWater's East Coast Regional Masterplan, which sets out servicing needs across the next 50 years for both Glamorgan Spring Bay and Break O'Day, identifies approximately 9,200 lots that could be developed within TasWater's service areas if zoning permits, with growth areas concentrated around Bicheno, Swansea, Orford and St Helens.

Servicing it is harder here than elsewhere, for two reasons.

The first is seasonality. Around 50% of dwellings are unoccupied during off-peak periods, particularly in coastal settlements, reflecting its role as a major tourism destination. This creates a unique service challenge: water infrastructure must be sized for both permanent residents and peak tourist season demands, a significantly more complex planning scenario than standard residential areas.

The second is climate. Glamorgan Spring Bay has been identified as having lower drought resilience compared to other southern LGAs, with projected increases in evapotranspiration, reduced summer soil moisture, and more frequent extreme temperature events by 2070. As a coastal region with water dependent infrastructure and population concentrated in towns dependent on water supply from rainfall-fed rivers and dams, Glamorgan Spring Bay faces compounding risks from warming temperatures, changing rainfall patterns, and rising sea levels.

Issue

Water infrastructure limitations and climate variability are the primary constraints preventing housing development and economic growth in Glamorgan Spring Bay. The region's water security challenge operates at multiple levels:

Climate and hydrological constraint

The region experiences ongoing low rainfall and extended periods of low river flows. Along the East Coast, the Scamander River ceased to flow for the first time in recorded history in 2019/20, exemplifying the severity of the challenge. The region has experienced major droughts in 2006, 2008 and 2019, with further localised droughts in 2002, 2007, 2014, 2015 and 2017.

Glamorgan Spring Bay has been identified as having lower drought resilience compared to other Tasmanian LGAs. Licensed water allocations are already insufficient to meet demand during dry periods. Compounding this vulnerability, climate projections to 2070 show days over 30°C increasing from 4 to 10 in Triabunna, with average temperatures rising by 2°C and summer soil moisture predicted to decline. These changes directly reduce water availability while simultaneously increasing evapotranspiration.

Glamorgan Spring Bay's lower resilience, combined with these projected climate changes, indicates compounding vulnerability. Climate change impacts also threaten coastal infrastructure through rising sea levels and increased storm intensity, putting sewage treatment plants and other assets at risk of inundation. Changing rainfall patterns and warming temperatures are expected to exacerbate water scarcity across the region.

Infrastructure constraint

Current water treatment plants and storage systems cannot reliably meet demand during peak tourism seasons or dry periods. Multiple systems (Orford, Triabunna, Bicheno, Swansea, Coles Bay) operate independently and inefficiently. Many assets are ageing and in poor condition, with integrity increasingly compromised by climate variability. The region has experienced regular water restrictions, and without system improvements, restrictions could continue.

Funding constraint

The cost of required infrastructure upgrades cannot be borne by the small resident rating base. With the infrastructure primarily required to serve both a small permanent population and massive peak tourism demand (50% vacancy during off-peak), cost per ratepayer reaches $60,000 to $80,000. It is unrealistic to expect residents to fund infrastructure essential to enabling regional growth and tourism expansion.

Regional attraction

Critically, without state or Commonwealth funding, water insecurity undermines the region's ability to attract migrants. Quality serviced housing and reliable infrastructure are essential to liveability and regional appeal. Without infrastructure investment, the region cannot compete for the population growth its economic opportunities and natural assets support. State or Commonwealth funding is essential

Benefit

Removing water infrastructure constraints unlocks the residential and tourism growth potential already identified in land use planning, builds climate resilience, and delivers economic and social benefits across the region.

Housing development and affordability

Water infrastructure investment unlocks the 9,200 developable lots identified across the East Coast Regional Masterplan. Increasing housing supply at this scale is essential to addressing housing unaffordability across the broader region, while simultaneously accommodating Glamorgan Spring Bay's projected demand of 1,721 new dwellings by 2046. This dual benefit, both regional supply and local demand, supports population growth and attracts new migrants seeking quality serviced communities. It is also essential to supporting key workers in hospitality, tourism, and service sectors who currently struggle to find affordable local housing.

Tourism and seasonal capacity

Enhanced water capacity, particularly through system consolidation and new storage, manages peak season demand, enabling tourism expansion in visitor accommodation, hospitality services, and associated employment.

Climate resilience and reliability

Consolidating fragmented systems reduces vulnerability to climate-driven water shortages and drought. Modern, interconnected infrastructure is more resilient to extended low flow periods and extreme weather, reducing reliance on water restrictions that constrain development and economic activity.



2

Ongoing Investment in Southern Tasmanian Regional Land Use Strategy

Priority for Investment

SERDA recommends that the Southern Tasmania Regional Land Use Strategy:

- Include clearer recognition of regional settlements and their growth pathways, strengthened through careful review of and consultation on employment land and infrastructure planning.
- Address the identified shortage of industrial land and ensure the Regionally Significant Industrial Precincts are adequately considered in future iterations.
- Include meaningful input from all four SERDA member councils to provide a credible long-term development guide that reflects rural, regional and urban needs.

Context

The Southern Tasmania Regional Land Use Strategy (STRLUS) sets out the broad planning framework for the southern region and provides a framework for additional dwellings and employment land. STRLUS proposes up to 36,000 new dwellings for the southern region (2008 to 2035) in a mix of infill and greenfields development. Greater Hobart is expected to add 26,500 dwellings over the same period.

STRLUS includes growth scenarios for SERDA councils broken up by settlement type and function and maps greenfields and infill development sites which shape future growth expectations. It acknowledges that seasonal fluctuations are especially relevant to services and dwelling growth in Tasman and Glamorgan Spring Bay.

STRLUS notes a preliminary industrial land demand and supply analysis found a potential short-term shortage of industrial land within the region. The Strategy identifies a number of Regionally Significant Industrial Precincts (RSIP) across the southern region, including Brighton and Cambridge, and emphasises the importance of improving freight connectivity, access and supply chain relationships between these precincts. This shortage has not been considered within the current STRLUS.



Issue

The position of SERDA members is that while STRLUS provides the strategic planning framework for Southern Tasmania, the Strategy is predominantly focused on Greater Hobart and urban growth, with comparatively limited consideration of the needs and development models of rural councils. Despite a preliminary industrial land analysis identifying a potential short-term shortage, this gap has not been addressed in the current Strategy.

SERDA seeks meaningful input into the Southern Tasmania Regional Land Use Strategy to ensure it reflects the distinct characteristics, challenges and infrastructure needs of the SERDA region, and support equitable regional development across southern Tasmania.

Benefit

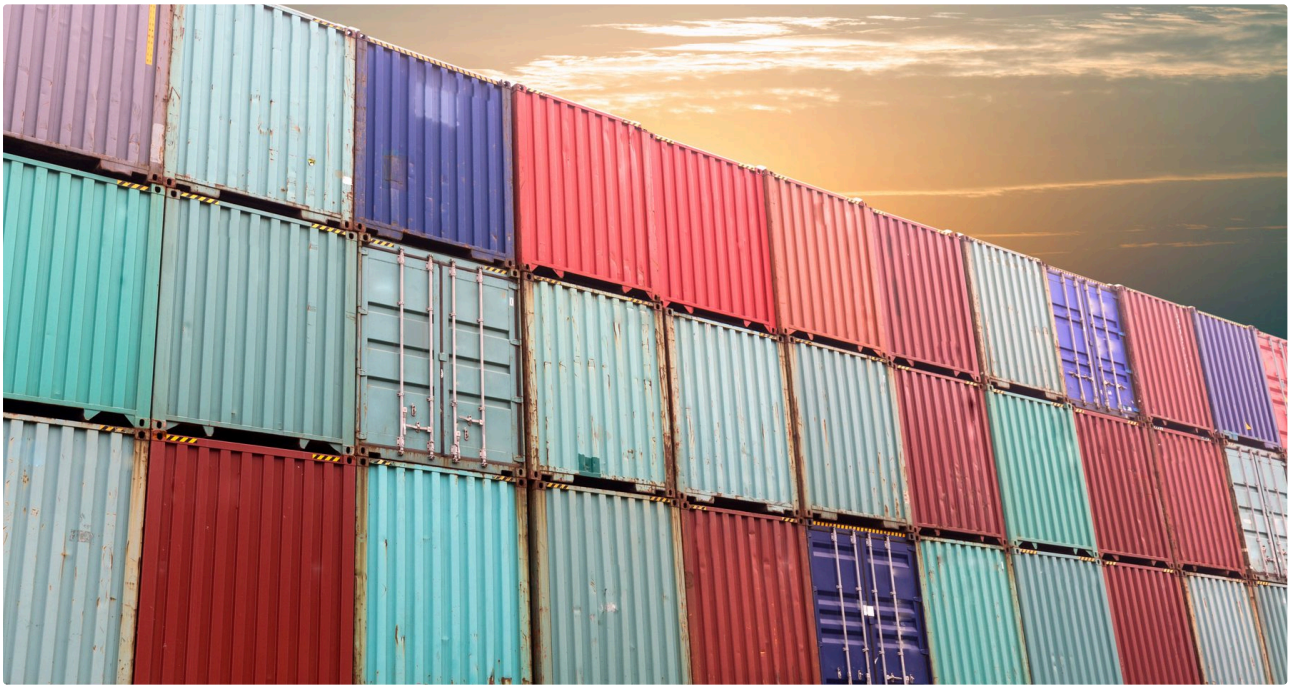
STRLUS will provide the strategic planning framework for investment in the wider southern region. Closer collaboration with the SERDA councils will ensure that the planning framework is fit for purpose, even in the smaller population and more rural parts of the SERDA region, where the planning and investment environment is different to that in urban areas.

3

Brighton to Cambridge Freight Link

Priority for Investment

SERDA recommends that the Brighton Cambridge Freight Link Options Assessment work be completed as soon as possible so that costs and benefits can be quantified and a business case developed for the freight link project.



Context

Brighton and Cambridge are two of southern Tasmania's Regionally Significant Industrial Precincts, and the freight relationship between them is one that preliminary work completed for STRLUS explicitly identifies as needing improvement. Cambridge sits within the SERDA region and continues to expand as an industrial, commercial, airport and employment precinct, anchored by Hobart International Airport and the Hobart International Business Park.

Building Tasmania is currently examining improved freight links between the two hubs. Its background work has determined that heavy vehicle demand between Brighton and Cambridge is expected to increase, and that the existing heavy freight routes joining them will become increasingly congested — which "may pose a challenge for efficient freight movements."

The next step in that work is an Options Assessment. Until it is completed, the corridor's costs and benefits cannot be quantified, no business case can be developed, and the project cannot compete for capital funding through any state or Commonwealth program.

Issue

Without a new freight corridor, this growing congestion will pose a significant challenge for efficient freight movements and undermine the strategic opportunity to support further growth at the Hobart International Airport precinct and the Cambridge industrial, commercial, airport, and employment precinct. Improved freight connectivity is critical to strengthening connections between the south-east and Tasmania's broader freight network and improving access to Hobart International Airport.

Benefit

Improving Brighton to Cambridge heavy freight connectivity is expected to:

- Improve Tasmania's freight network for increased economic benefits;
- Create opportunities for local industries to grow and develop;
- Improve road safety for all road users; and
- Improve road access and connections for all road users.

4

Wielangta Forest Mountain Bike Trail

Priority for Investment

SERDA is seeking $5.55m (ex GST) for project construction, inclusive of $550,000 for pre-construction activities.

A completed business case returns a benefit–cost ratio of 2.0 at the 7% discount rate required for Australian and State Government assessment — every dollar invested delivers two dollars in benefits. The ratio remains positive at 1.7 under the most conservative 10% discount rate. Unlocking investment to progress to project delivery will provide:

- An additional 5,000 to 10,000 visitors per annum.
- Additional trail user spend of $2m–$3.8m per annum.
- Construction investment $5m and maintenance over 10 years of $2.5m.
- Additional 15.8 jobs during construction and 11 to 20 jobs over the first 10 years of operations.



Context

Tasmania has built a mature and internationally recognised mountain bike sector. Blue Derby, Maydena, Wild Mersey, the West Coast and St Helens have collectively established the state as Australia's leading MTB destination, drawing around 75,000 visitors and $91m in spending in the year to March 2025. Tasmania's next competitive advantage lies not in adding capacity to a mature market but in offering a different kind of experience.

The Wielangta Forest MTB Trail is that different product. It is a 70km point-to-point wilderness touring trail from Kellevie to Orford, designed to be ridden over two days with accommodation partway. No comparable multi-day wilderness MTB touring trail exists in Australia.

The closest working model is New Zealand's Timber Trail, an 85km, two-day ride through Pureora Forest Park, developed as part of New Zealand's post-GFC regional economic recovery programme. A decade on, it attracts approximately 22,000 riders annually and injects more than $7m a year into the rural economy.

The Wielangta Forest MTB Trail repurposes more than a century of disused forestry roads, snig tracks and log haulage lines. It sits conveniently 80 kilometres from Hobart International Airport, adjacent to Maria Island, the Great Eastern Drive and Port Arthur. It targets a demonstrated market: 32% of the adult Australian population has incorporated or considered a mountain bike experience in a holiday, and MTB visitors to Tasmania – while only 2% of all visitors – account for 4% of visitor nights.

In 2025, the State Government funded SERDA to commission a full business case for a mountain bike trail through the Wielangta Forest, building on the Southeast Tasmania Mountain Bike Strategic Plan (2023). That business case was completed in July 2025 by TRC Tourism, with planning and environmental advice from ERA Planning and economic modelling by MCa. Its central finding is that the proposal is commercially and economically sound. It sets out a staged implementation pathway to construction, with risks identified and mitigations proposed at each stage.

Issue

The business case has established the case for investment. What remains is the work required to make the project construction-ready.

The business case estimates capital construction costs of $5m, derived from the 2023 Southeast Tasmania Mountain Bike Strategic Plan with allowances for escalation and contingency. It is, however, a construction estimate, and as the business case has identified, the pre-construction work required over the next one to three years is not separately costed and requires its own dedicated funding source.

That pre-construction work is defined, sequenced and deliverable. It is set out below, with indicative costs.

Detailed route analysis and environmental/cultural planning

An indicative allowance of $225,000 has been made for detailed route analysis and environmental and cultural planning. The work will refine the conceptual 70km trail network into preferred, ground-truthed alignments suitable for land-manager consultation, planning and subsequent detailed design. The scope is expected to include desktop GIS and topographic analysis, field ground-truthing, GPS route definition, trail classification, constructability assessment, integration of environmental, Aboriginal heritage and geotechnical constraints, preliminary engineering advice, identification of waterway crossings and other structures, and preliminary construction quantities and cost estimates.

The allowance has been informed by previous South East Tasmania mountain bike planning work, including preliminary route scoping, and comparable mountain bike trail design projects. The final scope and cost would be confirmed through competitive procurement following completion of the Year 1 investigations and refinement of the preferred route corridors.

Specialist investigations and technical advice

An indicative allowance has been made for specialist investigations required to progress the proposed trail to detailed design and approvals, including natural values and ecological assessment, landslip hazard assessment, Aboriginal Heritage Assessment and specialist geomorphological/waterway advice. The allowance has been developed having regard to the approximately 70km trail corridor, the environmental and heritage constraints identified in the Business Case and the scope of assessments likely to be required. The final cost will be confirmed through competitive procurement following refinement of the preferred trail alignment.

- Natural Values Assessment (NVA) and Ecological Survey — an indicative allowance based on the anticipated scope of ecological field assessment along a 70km linear corridor, including targeted threatened flora/fauna and vegetation assessment, mapping, reporting and approvals advice. The allowance is materially higher than a conventional site-based NVA because of the length and ecological complexity of the proposed trail.
  Recommended allowance: $100,000–$150,000.
- Landslip Hazard Report — an indicative allowance for desktop terrain/geology assessment, targeted field inspection of the 70km corridor, identification and mapping of landslip-prone sections and recommendations for trail alignment and construction. The allowance assumes targeted investigation rather than intrusive geotechnical investigation along the entire corridor.
  Recommended allowance: $30,000–$60,000.
- Aboriginal Heritage Assessment — an indicative allowance for Aboriginal Heritage Register research, desktop assessment, archaeological field survey, Aboriginal Heritage Officer participation, Aboriginal community consultation, site recording/mapping and preparation of the Aboriginal Heritage Assessment Report.
  Recommended allowance: $40,000–$70,000.
- Specialist Geomorphology, Waterway and Environmental Advice — an allowance for specialist technical advice that may be identified through the ecological, heritage and geotechnical investigations, including geomorphology/geosite assessment, waterway and erosion advice, threatened species specialist input and environmental approvals advice.
  Recommended allowance: $30,000–$60,000.

SERDA is seeking a total of $550,000 to complete the pre-construction activities as outlined, part of a total $5.55m funding request.

PRE-CONSTRUCTION REQUIREMENTS AT A GLANCE

Pre-construction requirement	Purpose	Indicative cost	Status
Governance establishment	Inter-council MoU under s.20 and s.21 of the Local Government Act; project control group; preparation for transition to a special purpose entity.	Nil.	**In effect.**
Dedicated project management	Coordination across two councils, four land managers and multiple private landowners; drives approvals and reporting.	In-kind council contribution.	**Ready to commence.**
Detailed route analysis and environmental/cultural planning (Year 2)	Confirms alignment, trail types and construction methodology; firms the capital cost estimate. The business case notes the route is indicative and subject to further assessment.	$225,000 ex GST	**Ready to commence.**
Specialist investigations and technical advice	– Natural Values Assessment and Ecological Survey – Landslip Hazard Report – Aboriginal Heritage Assessment – Specialist Geomorphology, Waterway and Environmental Advice	$325,000 ex GST	**Awaiting prior activities.**

The Wielangta Forest MTB Trail is not an incremental addition to a crowded market. It is a nationally distinctive product that would extend visitor length of stay, capture a higher-yield touring segment, and generate demand for accommodation and services along a corridor that currently attracts pass-through traffic rather than overnight visitation.

A product Tasmania doesn't currently have

The trail's primary value is not incremental trail kilometres. It is a new category of experience. A two-day, point-to-point wilderness ride with accommodation partway is untested in Australia and proven in New Zealand. Wielangta would give Tasmania the national position in multi-day MTB touring that Blue Derby secured in destination trail parks, extending the state's competitive advantage rather than duplicating it.

Higher-yield visitors, staying longer

Because the trail cannot practically be ridden as a day trip, it attracts visitors who stay. Trail users staying overnight account for approximately 80% of all projected user spending in the region, and the business case projects total user spending of $29.4m over ten years with $19.9m from visitors originating outside the region. Mountain bike visitors to Tasmania already over-index on length of stay, and skew toward the 45–54 age group with household incomes above $150,000.

Conversion of pass-through traffic to overnight stays

More than 370,000 tourists travel through Sorell annually en route to the East Coast, Port Arthur and Hobart. Orford anchors the southern end of the Great Eastern Drive. The trail gives that traffic a reason to stop rather than pass, in a corridor that currently captures little of its value.

Demand for accommodation the region can build to

Projected overnight stays generate demand for 32 rooms per night in Year 1, rising to 55 by Year 10, a defined, forecastable investment signal for existing operators and new entrants. Twamley Farm and Rheban Farm are identified as potential on-trail accommodation partners, and the Timber Trail experience demonstrates that a credible multi-day trail unlocks private investment in lodges, transport, bike hire and guiding.

Regional employment and income

Construction generates 15.8 FTE positions and $1.77m in regional income. Operations generate 11.2 FTE in Year 1 rising to 20.5 FTE by Year 10, concentrated in accommodation, food and beverage, retail and recreation services. Total regional income over ten years is $14m.

Economic diversification and community outcomes

The trail converts a legacy forestry landscape into a visitor economy asset. For a region where tourism is a growth sector but the product base is narrow, it broadens both the offering and the geographic spread of visitor spending across the Sorell and Glamorgan Spring Bay LGAs. It also delivers quantified health benefits of $4.1m and productivity benefits of $0.7m, provides recreational infrastructure for local communities, increases legitimate community presence in forest areas currently subject to illegal dumping and firewood cutting, and creates a platform for interpretation of the area's forestry history and, subject to consent through the Tasmanian Aboriginal Centre, Tasmanian Aboriginal living culture.

5

Digital Connectivity

Priority for Investment

SERDA is seeking federally funded infrastructure mapping and gaps analysis, supported by the Tasmanian Government, to:

- Identify digital connectivity gaps across the SERDA region.
- Propose connectivity solutions (NBN or alternatives).
- Outline costs associated with improving digital connectivity.

On the receipt of in-principle support from the Tasmanian Government, SERDA will progress a project briefing to propose to the Australian Government in collaboration with the state.

Context

High-quality digital connectivity is a foundation of a variety of economic and social requirements. The latest Australian Digital Inclusion Index shows that digital connectivity in the SERDA region is below the national average. Additionally, the STRLUS – previously referenced – notes that:

> *High-speed internet infrastructure [allows] our communities to work from home, study, access telehealth, shop and run businesses. However, many parts of the region do not enjoy the same access to digital services as Metropolitan Hobart. Capitalising on digital infrastructure will support the delivery of economic and social services to more remote communities and enhance local economies, including tourism.*
>
> **STRLUS**

Issue

Across the SERDA region, all member councils are below the national average on the Australian Digital Inclusion Index, with Tasman and Glamorgan Spring Bay two of the five worst performing LGAs in Tasmania. Compared with the national average index score of 73.6, Hobart has a score of 75.3, above the national average index score and well above the index score for the SERDA LGAs.

AUSTRALIAN DIGITAL INCLUSION INDEX (2024)



Across Australia, the estimated annual economic benefit of closing the digital divide for highly excluded Australians is $467M/year, and with government and industry sharing an ambition for having 1.2 million people in tech sector jobs by 2030, there is an opportunity to encourage more tech sector workers to the region through improved digital connectivity, digital inclusion, and telecommunications infrastructure investment.

Additionally, NBN Co research estimates significant economic returns from improved connectivity:

> *Accenture modelling for NBN Co found that for every one megabit per second (Mbps) increase in average broadband speed, Australia's productivity-driven GDP increased by 0.04 per cent, on average, in the period from 2012 to 2022. The cumulative GDP uplift during this ten-year period was estimated at $122 billion.*
>
> **ACCENTURE/NBN CO**

The research also found that the economic impact derived from increases in average broadband speeds were 16 times greater in remote areas of Australia and twice as profound in regional areas relative to the impact in major cities. Accenture research analysts suggest that the outsized productivity impact of faster broadband speeds in more isolated regions relates to the fact that regional and remote areas of Australia started from a much lower base in terms of average broadband speeds. More ubiquitous access to better broadband has expanded the customer reach of e-commerce entrepreneurialism and provided better online access to work and education.

Estimates for Tasmania were that the economic impact of the NBN so far has been in the order of an additional $2.2 billion in GDP, an additional 3,900 jobs and an additional 1,700 businesses.

Benefit

With SERDA LGAs below the national average in terms of digital infrastructure, social and economic outcomes from improving connectivity could be significant in terms of:

- New business formation
- Improved business productivity
- Increased ability to work from home and reduced commuting
- Improved life satisfaction
- Improved social connection
- Improved community safety, including the ability to receive emergency warnings and contact emergency services in bushfire prone and isolated coastal settlements



Conclusion

The SERDA region is a thriving regional economic hub that underpins much of southern Tasmania's economic and social activity. Four councils covering 6.2% of the state's land mass are home to more than 90,000 people and 25,000 jobs. Almost 20,000 residents travel to greater Hobart for work each day and around 6,000 people travel the other way. The east coast alone hosts over 1.6 million visitor nights a year. When housing, servicing or connectivity fails in this region, the effects are felt well beyond its boundaries.

Water infrastructure determines whether land already identified for development on the east coast can actually be built on. STRLUS determines whether the planning framework governing the next two decades reflects how growth works in smaller and seasonal settlements, or only how it works in Hobart. The Brighton to Cambridge freight route determines whether two of the state's significant industrial precincts can move goods between them as demand increases.

The Wielangta Forest MTB Trail offers Tasmania – and Australia – a visitor product it does not currently have, in a corridor that currently experiences significant pass-through traffic. Digital connectivity determines whether businesses and residents in the region can participate in an economy that increasingly assumes reliable internet access as a starting point.

None of these constraints can be resolved without government investment. Three of them sit beyond what a small rating base can reasonably fund. Two require decisions that only state government can make.

These five investments were selected by all four member councils through extensive discussion during 2026, tested against SERDA's Strategic Plan 2025–2030, and assessed for local, regional and statewide benefit. They are not a list of everything the region wants. They are the investments SERDA members agree the region needs to deliver future prosperity and provide for its communities while it grows.

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