Southern Tasmania Regional Land Use Strategy

Background Report No.11: Activity Centre Analysis

May 2011

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This document is detailed supporting information for the Regional Land Use Strategy for Southern Tasmania.

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Tables

Figures

Executive Summary

This report examines the activity centres in the Southern Tasmanian region primarily from a retail and commercial viewpoint, with the aim of setting a framework for a network of activity centres, which is best placed to serve the region. This framework is to replace current planning and priorities that are set at a local government level.

This report recommends the following network of centres as best placed to serve the Southern Tasmanian region. The various multipurpose Activity Centres are complemented by a Specialist Centre that has a limited and well defined function.

Primary Activity Centre

- *Hobart CBD*

Principal Activity Centre

- *Central Glenorchy*
- *Rosny Park*
- *Kingston*

Major Activity Centre

- *Moonah*
- *Bridgewater*

Rural Services Activity Centre

- *Huonville*
- *Sorell*
- *New Norfolk*
- *Brighton*

Specialist Centre

- *Cambridge Park (Bulky Goods and Office)*

The Hobart CBD is the highest order activity centre in the region, both from a historical viewpoint, and in terms of its current retail services, employment and cultural and community services. Hobart Local Government (LGA) contains almost half of all jobs in the Southern Tasmania region. Hobart will continue to be a vibrant and active hub and focus for activity centre functions.

The spread of Greater Hobart along topographical constraints lends itself to service by three Principal Activity Centres that service a "section" of the surrounding suburbs on a day to day basis. These are Central Glenorchy to the north, Rosny Park to the east and Kingston to the south.

Kingston LGA is somewhat different from the other two due to the fact that it is separated from Hobart by an inter-urban break, and has limited connectivity directly to other centres apart from Hobart. Kingston is a relatively high population growth area.

The next level of centres within the Greater Hobart area are Bridgwater (further north from Central Glenorchy) and Moonah a mixed use area between Hobart and Central Glenorchy. Beyond the Greater Hobart area are a range of smaller centres some of which form the focus for outer LGA's with a predominantly rural focus. These include Huonville, Sorell, New Norfolk, and Brighton. These are significant centres for the areas surrounding them and need to provide a variety of services which need to be easily accessible.

The preferred network of activity centres as outlined above provides a range of services to the surrounding community, and broader catchment in some cases. Typically these centres provide a range of retail services, community services, recreation, and in some cases office based employment. This range of land uses facilitates multi-purpose trips to the centres. Specialist Centres are not considered a part of the network of regional Activity Centres, but rather complement the role of regional Activity Centres only as required, as specific community need and benefit can be demonstrated. The only Specialist Centre currently existing and desired at this time is Cambridge Park providing a specialist bulky goods retail service only and a limited concentration of office based employment. The Specialist Centre should not develop as a multi-purpose activity centre, but should be recognised for its existing function as a significant bulky goods/ homemaker centre for the region.

The specific focus of any Specialist Centre should be clearly articulated (e.g. "Bulky Goods and Office" for Cambridge Park).

At a lower and more local level neighbourhood centres and local shopping strips may offer a variety of uses. As they primarily serve local catchments, they are not considered as being part of the regional activity centres network and are not within the scope of this study. They complement the regional network and should be guided by councils accordingly.

Activity Centre Principles

This SGS report has considered activity centres not just as providers of retail services, but as places of employment and living, with a key community role in providing social interaction and broader community services. Activity centres are not just dispensers of retail goods and services. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment activities, and places for living through new forms of higher density housing with good levels of amenity, in mixed land use settings. The approach of this report and the principles for activity centres has been based on this view.

There are a number of common issues with most existing Southern Tasmanian centres (typical of many activity centres elsewhere) which include:

- *A lack of place making focus;*

- *Internally focused shopping centres, that do not attract pedestrians nor a range of uses beyond shopping (i.e. entertainment, dining, community space);*
- *Disconnected and disjointed centres, which lack pedestrian accessibility and community focus; and*
- *A lack of higher density residential options.*

While most centres lack major employment beyond retail and personal services it will be likely to be difficult to attract such employment to most centres, given the limited market and lack of attraction. The CBD will continue (with a few exceptions) to be the focus for major office based employment and this is consistent with its desired employment role.

Public transport services in the region are limited to bus services and future accessibility to centres needs to balance the ongoing need for car parking with a shift to encouraging public transport use. Future mass transit services (i.e. reuse of the northern rail corridor for passenger services) may be a medium to long term option given current development patterns, however options for such a service and complementary land use change should be preserved in order to maximise future potential of the activity centre network.

Activity Centre Principles

This report proposed principles for activity centres which address the desired outcomes in a number of areas:

- *Suitable scale of centre to serve its designated catchment;*
- *An appropriate range and scale of employment;*
- *Suitable retail services;*
- *Appropriate commercial office space;*
- *Adequate public transport;*
- *A range of government services and community infrastructure;*
- *Suitable entertainment options; and*
- *Residential development that maximises accessibility and centre activity.*

As mentioned previously the character and role of Specialist Centres are significantly different from regional Activity Centres and lack the broad mix of facilities and services. Specialist Centres may vary significantly depending on their specific role and land uses. However Specialist Centres should generally have;

- *Service for a regional catchment whether it be for education, specific employment, or specialised retailing;*
- *Broader retailing limited to that serving employment within the centre (i.e. convenience retailing, cafes, takeaway food);*
- *Employment based on synergies with other land uses or industry, or large floorplate requirements that cannot be reasonably located in-centre; or*
- *No entertainment, community uses, or government services.*

Out-of-Centre Development

This report recognises the adverse impact that can occur through out-of-centre development including both retail and commercial office uses. It is considered that out-of-centre development could potentially result in a negative impact on the sustainability and economic performance of the *region's activity centres by diverting some investment, services and employment away from the activity centres to other out-of-centre locations. Out-of-centre development could also adversely impact upon the accessibility of centre services and the provision of a well connected and efficient urban form in the future, as well as undermining the efficient use of public transport and returns on such investment.*

In some circumstances, it may not be appropriate for certain developments to be located within designated centres. Home-based business activities should also be recognised and encouraged for their economic potential and as a feeder for future activity centre tenants.

In order to maintain an effective and efficient activity centre network this report promotes three basic principles for recommended policy for dealing with out-of-centre development proposals:

- *Demonstrated community need;*
- *No adverse impact on the existing or planned network of centres; and*
- *Synergies with other land uses such as health, education and research activities for example.*

1 Introduction

1.1 Background and Purpose of this Report

SGS has been commission by the Southern Tasmanian Councils Authority to prepare this analysis of the commercial and retail sector of Southern Tasmania. The Southern Tasmanian Councils Authority is project managing the Southern Tasmania Regional Planning Project. This project is a joint initiative of the State Government, the Southern Tasmanian Councils Authority, its 12 member Councils, and the Sullivans Cove Waterfront Authority. The Memorandum of Understanding establishing the project requires the preparation of a Regional Land Use Framework and associated settlement and infrastructure investment strategies

The purpose of this project is to provide a strategic planning analysis of the existing activity centres (of regional significance) in the Southern Tasmania region. The pattern of urbanisation and the role of activity centres have changed over the last 50 years and will continue to change. One of the key changes has been the shift from a mono-centric structure with Hobart as the only significant centre to a poly-centric structure which has seen the emergence of other commercial centres, some of which have the potential to compete with some functions of the CBD. Currently land use planning in Tasmania is carried out at the Local Government level and each Local Government has a good understanding of the commercial and retail activity within its local area. However, a better understanding of the regional network of centres, and their future roles, is needed to support the regional Strategic Plan.

The geographical scope of this analysis includes the twelve Local Council areas that comprise the Southern region. These areas are shown on the map in Figure 1 and are:

1. Brighton
2. Central Highlands
3. Clarence
4. Derwent Valley
5. Glamorgan Spring Bay
6. Glenorchy
7. Hobart
8. Huon Valley
9. Kingborough
10. Sorell
11. Southern Midlands
12. Tasman

Within these areas, the main regional and sub-regional activity centres that will be the focus of the project (as stipulated by the project brief) are (see Figure 2):

1. Hobart City (Hobart City Council) .
2. Central Glenorchy (Glenorchy City Council)
3. Moonah (Glenorchy City Council)
4. Rosny Park (Clarence City Council)
5. Kingston (Kingborough Council)
6. Sorell (Sorell Council)
7. Brighton/Bridgewater commercial area (Brighton Council)
8. New Norfolk (Derwent Valley Council)
9. Huonville (Huon Valley Council)

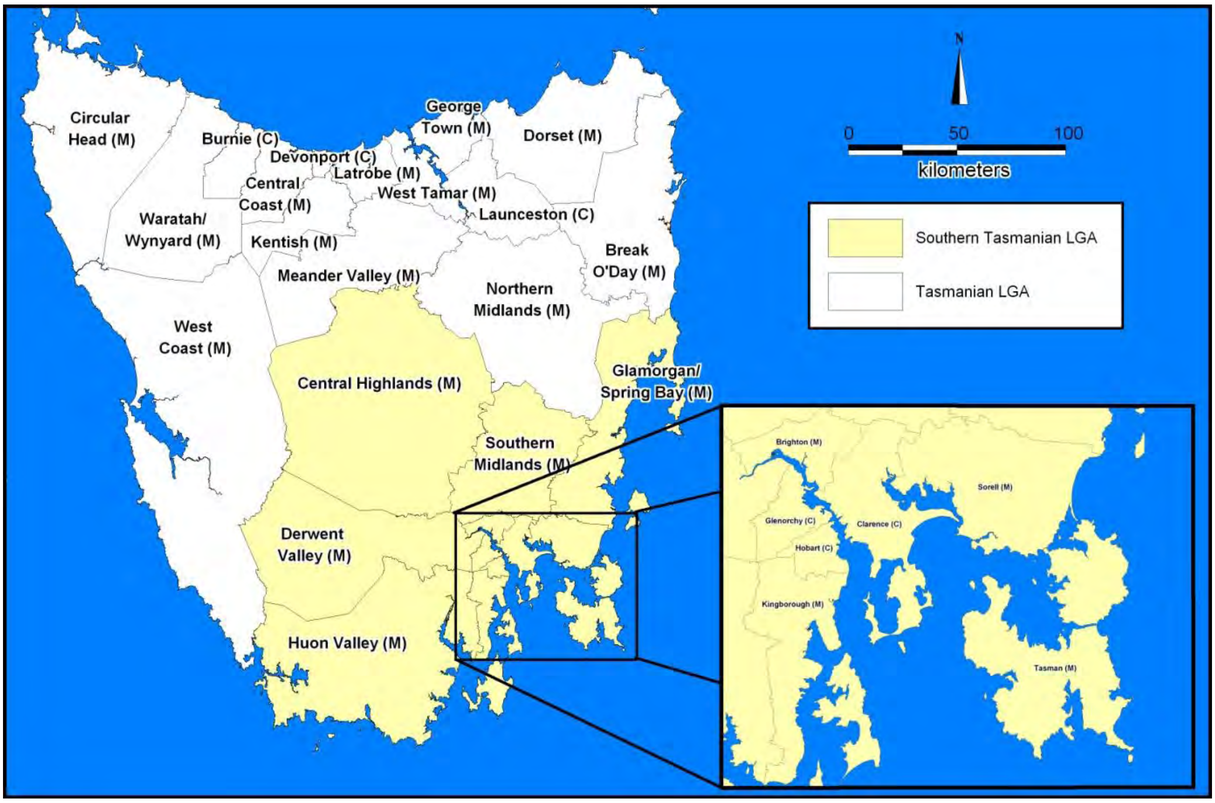
However in preparing this report SGS Economics and Planning has examined other centres which are considered to have a significant impact on the regional network of activity centres.

For the purposes of this report activity centres are defined as follows:

> *Activity centres have their primary role as dispensers of retail goods and services, however successful activity centres combine a much broader range of functions. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment activities, and places for living through new forms of higher density housing with good levels of amenity, in mixed land use settings.*

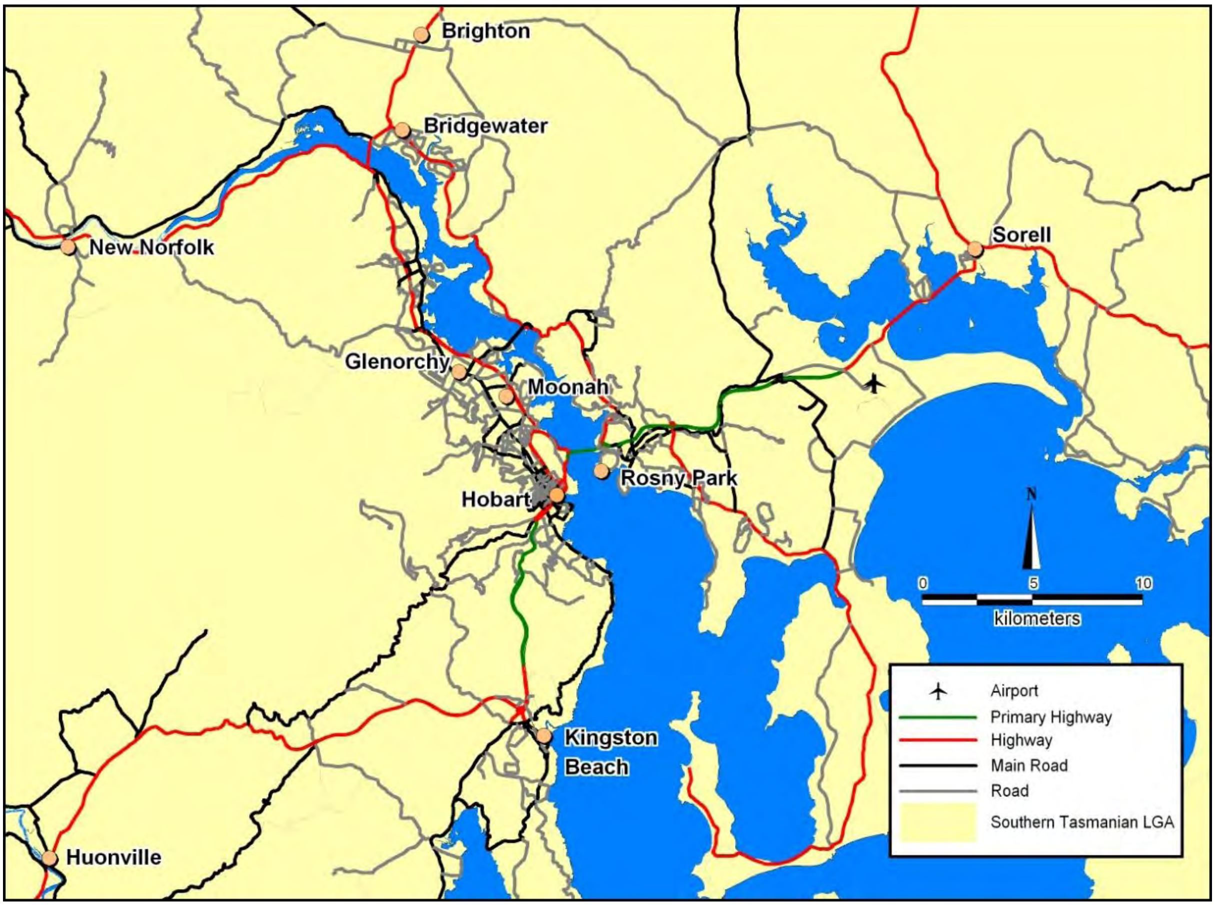
It should be noted that there are other nodes of activity which include trade and construction related retail, significant employment, and community functions. These nodes play an important function, however they do not encompass the range of functions or primary retail role that are considered for this study to be "activity centres".

Figure 1. Southern Region of Tasmania



Source: LGAT and STAC (www.stca.tas.gov.au)

Figure 2. Activity Centres included in Study



Source: MapInfo

1.2 Structure of this Report

The report is structured such that it firstly sets the scene for an analysis of the current situation of the activity centres. It does this through a policy review, review of characteristics and trends (including population, economy and employment), activity in the region, and assessment of current centres. The report then draws on implications and findings from the review and assessment to propose a preferred network of centres and future development.

The report is structured with the following sections:

Section 2 Policy Review;

Section 3 Economic and Social Characteristics and Trends;

Section 4 Major Projects;

Section 5 Major Retail and Commercial Trends;

Section 6 Centres Assessment;

Section 7	Centre Principles;
Section 8	Managing Out-of-Centre Development;
Section 8	Centres Opportunities; and
Section 9	Findings and Recommendations.

2 Policy Review

2.1 Policy Context

This section of the report reviews available literature on the strategy and policy framework within which the activity centres strategy will operate. Pertinent issues for consideration are outlined, as are any desired centre attributes. A complete overview of the reviewed literature and key issues is outlined below. It should be noted that while a broad range of policy was reviewed for this report the following Section deals with the most relevant as directed by Southern Tasmania Councils Authority. It should also be noted that the information from the policy review has been considered in the context of being current direction only, with the work of this report intended to influence regional policy, which may require changes to local policy.

2.1.1 Brighton

Key Issues

- Lack of local employment;
- Need for more office and professional services uses to complement Bridgewater retail;
- Need for well defined CBD (Structure Plan promotes this as Greenpoint, while the older planning schemes promotes Cove Hill), ;
- Services and infrastructure lagging;
- Proposed Transport Hub offers opportunities for direct jobs and flow on benefits;
- Opportunities for expanded commercial zoning;
- Proposed Brighton rezoning to mixed use to encourage diversity following the Bypass; and
- Significant opportunity for population growth (infill and expansion).

Brighton Strategic Plan 2006-2016 Brighton Council (2006)
Objective To provide a preferred future and strategies for Brighton.

Activity Centre Issues
Some of the key issues identified were:
• Lack of employment opportunities in the area;
• Industry development and associated training;
• Need for a central business district;
• Increasing demands on services;
• Services and infrastructure need to keep up with development;
• Access to transport; kids and people without cars are isolated;
• Need to improve the image of the area; and
• Stigma of some areas needs addressing (the "haves and have-nots" and the great divide with respect to access to education and transport needs).
 	
Focus areas for the life of the plan are identified. Relevant activity centre focuses include:
• Getting our land use planning right – including business and administrative districts;
    o A land use and development strategy to provide a long term approach that produces sustainable and measurable economic, environmental (built and "green") and social benefits for the municipal area and the region;
• Facilitating provision of better transport systems;
    o Including a bike / walkway network that circulates and links various parts of the municipal area; and
• Promoting industrial and business growth.

Brighton Structure Plan **Aurecon (2009)**
Objective To inform the planning, management and implementation of long-term sustainable commercial, industrial and residential growth in Brighton to 2026.
Activity Centre Issues The Brighton municipality is located at the north western edge of the Hobart metropolitan area on the banks of the Derwent River. Recognised as one of the remaining areas of Hobart with urban expansion opportunities, the municipality is relatively free from the topographical and other constraints which hinder development in other areas, and relatively strong population growth is predicted to 2026. Bridgewater performs a primary retail role in the wider region, acting as a sub-regional centre for more remote townships such as Broadmarsh, Mangalore and Bagdad. These towns each have populations of a few hundred. Hobart provides higher order services that are not currently provided in the Brighton municipality. Bridgewater's retail area is split into two centres, being the Cove Hill precinct to the north of the Midland Highway and Green Point to the south. Major retail tenants in

Bridgewater are the Coles and Woolworths supermarkets at Cove Hill and Green Point respectively, with the Chickenfeed discount department store located at Cove Hill. All community services such as Housing Tasmania are located at Green Point. Bridgewater's retail centre is classified as town centre, although it performs some sub-regional functions.

The second order centre in Brighton/Bridgewater is the Brighton town centre, which contains a small supermarket, three petrol stations, and specialty shops which perform a neighbourhood centre role.

It is anticipated that with the development of the Transport Hub the following will occur:

- The intermediate production and transport workers will further increase in proportion to other occupations;
- Existing businesses will move from elsewhere in the state to the Hub, which may increase the number of people who commute into Brighton;
- The training track will continue to provide employment, and may increase in the number of jobs provided if the racing industry experiences expansion;
- Continued residential growth will provide jobs for tradespersons and labourers; and
- Retail may initially decrease, and then increase again as the Bypass and Hub may cause Brighton's scope for commercial activity to decrease due to a change in focus to the Hub and fewer vehicle movements through town, with a later increase through population growth.

The Structure Plan contains the following commercial hierarchy/structure:

- Green Point (Bridgewater) is to be promoted as the main commercial/retail area in the municipality. Additional commercial land is to be provided via a rezoning of land currently zoned for recreation purposes via a corridor which extends towards the Derwent River.
- Additional investigations into this area which are to be undertaken as part of the recommended Bridgewater activity centre master plan will ascertain whether a commercial or mixed use (commercial and residential) zoning is appropriate in adjacent areas. The provision of commercial floorspace including office space is the primary role of this area, and residential uses should be discouraged at ground floor levels.
- Cove Hill is to be promoted as the secondary commercial/retail area, and is to be rezoned to a mixed use (commercial and industrial) zone in recognition of the existing presence of both of these kinds of activities. The zoning of this area is to provide for big box retail.
- Brighton town centre is to be rezoned mixed use (commercial and residential) to respond to potential changes in the composition of the businesses following the construction of the bypass. The mixed use zoning will encourage this area to remain a focal point by encouraging development, and will also provide the opportunity for the creation of live-work units which will contribute to the diversity of the municipality's housing supply.
- Brighton Industrial Estate highway services precinct: the petrol stations from Brighton are likely to relocate once the bypass is constructed, and the interchange in the estate provides the opportunity to establish a new commercial area which provides for petrol stations and other highway services, with other uses being restricted to ensure inappropriate commercial uses are not established. The site was selected as it is adjacent to an interchange, it avoids the green buffer, and there is flat land available for development.

• Old Main Road is to be rezoned mixed use to provide for commercial and residential development opportunities. The area is not functioning effectively as a commercial area at present, and providing expanded development opportunities will assist in facilitating its viability. • Pontville's commercial area will not be amended as the heritage values of the surrounding land uses make it unsuitable for the expansion of commercial uses.
Key Regional Infrastructure Two important infrastructure projects are also underway which will have a significant impact on the form and functioning of the municipality, being the Transport Hub and the Bypass. A major infrastructure project is underway to realign the Midland Highway to bypass the townships of Brighton and Pontville and improve the connections to the Brighton Industrial Estate and future Brighton Transport Hub.
Brighton Planning Scheme 2000 **Brighton Council (2004)**
Objective To achieve sustainable use and development of resources in the Planning Scheme area.
Activity Centre Issues The sole reference to centre's strategy is in the commercial objectives of the Scheme. These objectives outline the facilitative role of the Council in driving centre's policy, and are as follows: • To encourage and facilitate the development of appropriate centres commensurate with their identified role to serve the needs of the existing and future population of Brighton. • Promotion of a wider commercial base to encourage offices, professional offices and service providers to concentrate around the Cove Hill precinct. • Reinforcement of Cove Hill as the regional shopping facility for the Municipality will underpin the zoning of the land for commercial purposes. This identification as the town centre will enable a forward strategy to be encouraged for the consolidation of the major providers to this community. • To provide for additional neighbourhood shopping facilities for the expanding area of Tivoli Green – Old Beach.

2.1.2 Clarence

Key Issues

- Key role of Rosny Park as main activity centre (for Clarence and Greater Hobart) and potential for redevelopment at higher densities and greater diversity of uses;
- Concerns over car parking shortages at Rosny Park;
- Promotion of Cambridge commercial and industrial precincts (particularly for bulky goods retailing, and campus style offices); and
- Hobart Airport development plans (retail and commercial).

Clarence Strategic Plan 2006-2011 **Clarence City Council (2006)**
Objective The plan outlines the goals, objectives and strategies that will guide the Clarence City Council to 2011.

Activity Centre Issues
The objective most relevant to activity centre policy was: "To create a community focal point for the City"
 	
The associated strategies are outlined as follows:
• On-going development of Kangaroo Bay as a community venue and focal point;
• Identify opportunities for community activity and utilisation of community spaces within the Rosny Park/Bellerive precinct;
• Complete, adopt and implement a Master Plan for Kangaroo Bay;
• Create linkage between Bellerive and Rosny Park;
• Review and implement existing Rosny Park/Bellerive streetscape plans including issues associated with the Bus Mall;
• Investigate the feasibility of a civic complex; and
• Promote and encourage innovative architecture in commercial and civic developments.
 	
Another relevant objective was to encourage broadly based economic growth within the City. Strategies under this objective include to:
• Work in partnership with government and industry to identify and promote appropriate commercial, industrial and business opportunities within the City including:
  o the on-going development of Cambridge commercial and industrial precincts;
  o Hobart Airport development;
  o Antarctic air-link opportunities;
  o intensive agriculture and aquaculture industries; and
  o extractive industry opportunities.

City of Clarence Business Prospectus **Clarence City Council (2008)**
Objective A prospectus outlining the comparative advantages of the City of Clarence, as well as its economic strengths by industry.
Activity Centre Issues The Clarence Planning Scheme retail/ commercial land use strategy reinforces the role of the Rosny Park business area as the prime retail and commercial centre of the City. Opportunities exist in Rosny Park Business Centre for: • intensification of the land use through development of vacant sites and/or multi-storey buildings; • rationalisation of land used for parking through development of multi-level parking facilities; • establishment of restaurant and entertainment activities; • establishment of professional and business services offices; • expansion in the variety of retail shops and services; and • development of a commercial link between Rosny Park and the waterfront Kangaroo Bay development precinct. Clarence City Council has also recognized the need to provide for large specialist/ bulky goods stores by providing for the establishment of such stores in a serviced industrial/commercial area at Cambridge. The Cambridge area near Hobart International Airport is ideally suited for a "big box" retail activity due to the availability of large greenfield sites with ready vehicular access and transport infrastructure linking to multiple consumer catchments. The zoning at Cambridge also provides for the establishment of campus style office development. Clarence is poised to expand its regional role within the retail sector with a number of major developments at Cambridge to come on line in the near future. Finally, the Kangaroo Bay area at Bellerive is nominated as an emerging waterfront visitor and leisure precinct. Opportunities for development are available in the tourism, accommodation, recreational, commercial and residential sectors.
Clarence Car Parking Strategy **Clarence City Council (2006)**
Objective To review the objectives of the car parking provision in the City and the application of a cash-in-lieu policy.
Activity Centre Issues Concerns about parking requirements have typically related to commercial uses in the Rosny Park commercial area and more recently at Shoreline Shopping Centre.

Centre Details

2004 estimates place the commercial floorspace in Rosny park at 90,000sqm.

Cambridge Homemaker Centre – Economic Impact Assessment

Urbis JHD (2004)

Objective

To identify the economic impacts associated with the proposed development of a bulky goods homemaker centre at Cambridge.

Activity Centre Issues

The study acknowledges Hobart as the primary regional activity centre, with the proposed development drawing consumers from across the Greater Hobart catchment.

The study identifies three potentially competing "homemaker clusters" in Rosny Park, the Hobart CBD Fringe, and Glenorchy/ Moonah.

Centre Details

The potential development would have a retail floorspace of 39,000sqm. Using market estimates of 17.5 employees per 1,000sqm of floorspace, it is estimated that the homemaker centre would generate an additional 703 FTE positions.

Retail floorspace for bulky goods sites in the proposed catchment are outlined below:

Suburb	Estimated Floorspace (sqm)
Hobart	20,500
Rosny Park	4,300
Moonah	8,350
Glenorchy	6,050
Mornington	900
Sorell	650

Lauderdale Retail Centre – Economic Impact Assessment

MacroPlan, 2008

Objective

MacroPlan Australia was commissioned by the developer to assess and consider the economic need and potential impacts of a proposed retail centre in Lauderdale.

Activity Centre Issues

Retail development potential in Lauderdale should not impact on the future role and function of other centres. In this case:

- Lauderdale should be allowed to perform a Neighbourhood Centre function.
- Shoreline should also continue to perform a Neighbourhood Centre role based on its own surrounding localised residential catchment. However, Shoreline is currently trading at near capacity, including car parking considerations, and has limited future expansion or

development potential.
- Rosny, including Eastlands, should continue to be supported at a Regional Centre function based on its wider catchment.

In the short term with the development of Stage one, MacroPlan's impact analysis has demonstrated that the proposed development would create a retail and community heart within Lauderdale, and bring essential retail, convenience and community services to Lauderdale.

Centre Details

If approved, the proposed Lauderdale Retail Centre will create a new retail node including:
- A major supermarket - 3,225 sqm;
- Specialty shops totalling - 4,261 sqm (including 180sqm café);
- Nursery incorporating an indoor area of 1,379 sqm, outdoor area of 887 sqm, and bulk landscaping supplies yard of 2,169 sqm;
- Pet shop - 1,307 sqm;
- Retail fuel outlet – site 715 sqm , located on the corner of South Arm & Ringwood Roads;
- Medical Centre - 501 sqm;
- Dental clinic - 500 sqm; and
- Open, on-site, sealed car parking spaces for 458 cars.

The project was rejected by the RPDC on the basis that a supermarket based centre ate Lauderdale would prevent a future development near Rokeby, a location more central to the identified residential growth centres for the area.

Clarence Planning Scheme

Clarence City Council (2007)

Objective

The Planning Scheme identifies planning policies and controls affecting the use, development and subdivision of all land within Clarence.

Activity Centre Issues

Retail growth, particularly at the regional shopping centre at Rosny Park, will continue to provide commercial opportunities to deliver expanding ranges of consumer goods, based on the sustainable competitive advantage its convenient location provides.

In 2000 there was 62,000sqm of retail floor space in the City. This is dominated by Eastlands at Rosny Park, with 44,000sqm.

There are also strong indicators of growth and business revitalisation at Bellerive / Kangaroo Bay and Richmond, where attractions including heritage and environmental values, as well as the potential to develop niche markets, will continue to succeed.

Two critical objectives of the scheme are as follows: • To reinforce the Rosny Park business area as a vibrant facility and as the prime retail and commercial centre serving the Clarence community and nearby communities from the southeast and the Western Shore; and • To reinforce the role of the Rosny Park business area as the major regional centre within the greater Hobart area. Relevant strategies include: • Maintenance of the City's retail hierarchy, including the pre-eminence of the Rosny Park business area; and • Development of a greater commercial link between the Rosny Park and Bellerive Village centres and provide for an exciting range of well-designed commercial, tourism, recreational and residential developments in and around the Bellerive Village centre and Kangaroo Bay.

2.1.3 Glenorchy

Key Issues

- Strategic desire for hi-tech research and development focus;
- Lack of well defined retail hierarchy, with considerable ribbon development;
- Poor land utilisation;
- Poor streetscape and pedestrian amenity;
- Lack of integrated office development;
- Lack of cultural and civic focus in centres;
- Traffic issues;
- Promotion of Glenorchy, Moonah and Claremont as principal activity centre nodes; thereby supporting public transport; and
- Promotion of better walking access to centres through zoning changes.

Glenorchy Strategic Plan 2009- 2014 **Glenorchy City Council (2009)**
Objective The Strategic Plan has been developed to build a strategic framework to achieve the broad range of outcomes outlined in the Community Plan.
Desired Activity Centre Attributes As a centre for private sector investment, the region is proudly associated with the development of world leading technology and product. The local community has expressed the desire to become State leader in hi-tech research & development, backed by world-standard call-centre activity. The city also values arts, sport, recreation and the built environment with potential to leverage from tourism activities and visitor attraction.

Planning Scheme Review Project - Commercial Land Use and Tourism **Glenorchy City Council (2008)**
Objective To examine how land use planning can encourage commercial land use and tourism by supporting a strategic approach to the location of economic development and develop clear and certain planning provisions.
Activity Centre Issues There a number of issues raised in the study relates to commercial activities: • A lack of defined and planned hierarchy and planning to the shopping centres within the City and within each commercial district; • Considerable ribbon development along Main Road with limited depth to the shopping districts; • Poor utilisation of land as seen by low plot ratios, low order uses in prime locations and vacant land; • Leapfrogging of some commercial developments into fringe areas to secure Main Road frontage; • Generally harsh and unattractive pedestrian environment with limited public amenity, streetscape enhancement, public facilities and safety; • No real defined growth strategy for the total commercial districts or for different uses; • Lack of integrated office development; • Lack of cultural or civic focus to the commercial district, and significant public spaces; • Considerable traffic congestion and traffic management problems including car parking; • Potential vehicle pedestrian conflicts; and • Fringe development (mainly Moonah) involving a range of industrial and commercial uses. These problems are related to the lack of positive planning intervention, and a reliance upon the market place to indirectly determine the future commercial and central area land use strategies for the City. In addition, the study outlined five major land use planning issues: • The need for a Shopping Centre Hierarchy; • Consolidation of the commercial centres; • Image and enhancement of the commercial centres; • Encouraging office development; and • Resolving the traffic problems. There has been identified a need for an additional 27,000sqm of retail floor space in the City up to 2011, comprising 18,900sqm in Glenorchy, 2,700sqm respectively in Moonah and Claremont and 2,700sqm retained as a reserve for peripheral sales. (Ratio 1993 v1: 12-13) The following centre improvements are recommended. Moonah – Some Key Elements • Loop road around centre; • Consolidate eastern car park; • Modernisation of Purity car park;

- New supermarket attractor – TAFE site?;
- Establish business support program;
- Implement changes to statutory framework, as required;
- Amenity improvements program; and
- Gateways (Ratio 1993 v1: 32).

Glenorchy – Some Key Elements

- Through traffic diversion;
- Bus interchange in Terry & Peltro Streets;
- Town Square development – facilitate development of Post Office and Health Centre;
- Northgate investigation area – Assist in securing a discount department store;
- Glenorchy Central Investigation Area - Assist in securing a discount department store;
- Commence business support program;
- Undertake amendments to the statutory framework as required;
- Adopt principles for redevelopment of town park;
- Regional open space linkages – Inter-city Cycleway and Humphreys Rivulet; and
- Streetscape improvements. (Ratio 1993 v1: 33).

Claremont – Some Key Elements

- Intersection improvements Box Hill Road- connected to Cadbury Road;
- Proposed new access off Bilton Street (entry only);
- Consolidation of Village on existing central block;
- Medium density residential in rail reserve; and
- Develop Claremont Recreation Ground as a formal common.

Planning Scheme Review Project - Integrated Land Use and Transport

Glenorchy City Council (2008)

Objective

To review issues and relevant solutions pertinent to the integration of land use and transport. The output formed a topic paper input for the Glenorchy City Council Planning Scheme Review.

Activity Centre Issues

The urban form development of Greater Hobart is described as follows:

"The dominance of motor car transport has led to an explosion in Hobart's urban form. Greater Hobart is a "linear" city. The Wellington Range on the western shore and the Meehan Range on the eastern shore extend in a line roughly parallel with the Derwent River. The settled area of the City is confined to the narrow river plain and foothills either side of the Derwent River. In recent decades, with widespread car ownership, the city has extended beyond its previous confines, "breaking out" to areas such as Kingston to the south, Bridgewater/Gagebrook and Otago to the north, Acton, Rokeby/Clarendon Vale, Midway Point, and the Southern Beaches to the East."

The following process is suggested for supporting public transport corridors:

- Identify a hierarchy of nodes which can act as hubs for commercial and social activity. This is already largely in place by virtue of the commercial hierarchy created under the existing Glenorchy Planning Scheme 1992 – which sets out a hierarchy of Central Commercial and

Local Shopping Centre Zones. It is considered to be sound practice to adopt the same approach in a new planning scheme using the Glenorchy, Moonah and Claremont central activity centres as the principal nodes.

In Glenorchy and Moonah, only a small proportion of the City's population live within easy walking distance of the Central Commercial Zones. A new planning scheme could promote inner urban living by removing the discretionary use status associated with various kinds of residential activity.

At the time of preparation of this Topic Paper, there were some 37 local neighbourhood shops in the City, which would (and do) serve as local hubs. There is a need to recognise these in some way and consider ways of opening new nodes in areas which are currently poorly served such as the western part of Claremont and Granton.

Desired Activity Centre Attributes
The National Charter of Integrated Land Use and Transport is referenced in the documenting, recommending "Concentration of provision of goods and services at hubs linked effectively by an efficient transport system."

Key Regional Infrastructure
There is also a proposal for a dedicated bus priority lane along the Brooker Highway, focused upon providing express transport into the Hobart CBD. There is also some potential for an express link to Glenorchy CBD from adjoining municipalities to the north, subject to investigation of customer travel behaviour in the source municipalities.

2.1.4 Hobart

Key Issues

- Intent to maintain CBD as pre-eminent centre for public administration, financial and professional services, commerce and retail;
- Promotion of above residential and tourist uses above street level to provide activity outside of business hours;
- Encourage intense activity at street level with active frontages;
- Promotion of a network of active mid-block pedestrian connections;
- Potential for impacts on the CBD from large scale development at Cambridge Park and Hobart Airport;
- Hobart CBD is a key source of employment and retailing for the surrounding region;
- Importance of making CBD attractive and accessible for workers and shoppers (via car, walking, cycling, and public transport); and
- Importance of providing appropriate uses in the CBD frame to support CBD employment and commercial activities.

Draft City of Hobart Planning Scheme **Hobart City Council (2008)**
Objective The purpose of this planning scheme is: • to further the objectives of the Resource Management and Planning System of Tasmania; and • to achieve the objectives for planning by regulating or prohibiting the use or development of land in the planning scheme area.
Activity Centre Issues It is the intention of this Planning Scheme to further the following objectives: • To maintain the CBD as the pre-eminent public administration, financial and professional service, commercial and retail centre in Tasmania; • To ensure that the range of business servicing the central City and its workforce can be accommodated in areas adjacent or close to the major CBD office and retail area; and • To facilitate the continuation and evolution of a range of community facilities and services, including major hospitals, in locations where they can provide a scale of facilities and level of accessibility compatible with surrounding land use. The scheme also refers to the emergence of a precinct to the north of the CBD containing a range of national bulky goods retailers should continue to complement the personal comparison shopping and food outlets that make up the CBD and the more specialist retailers. The planning scheme area is divided into zones. Zones are based on: • the existing and allowable future use of land within a zone; and • broadly similar natural, economic or community values. Key zones of interest to the centre’s strategy include the central business zone, the commercial zone and the local business zone. The purpose of each is outlined below: **Central Business Zone Purpose** • To provide for retailing, offices, entertainment and community services concentrated in a major centre; • To maintain and strengthen the primary shopping centre of Hobart, in which major retailers and specialty shops and services are supported by convenience shops, restaurants, take away food shops and hotels to serve the work force and visitors, all with convenient and safe access to public transport; • To encourage residential and tourist accommodation uses to establish above street level as a means of increasing activity outside normal business hours whilst recognising that the amenity of such uses may be reduced; • To provide a safe, comfortable and enjoyable environment for workers, residents and visitors through the provision of high quality spaces and urban design; • To encourage intense activity at pedestrian levels with shop windows offering interest and activity to pedestrians; • To encourage a network of malls, arcades and through-site links characterised by bright

shop windows, displays and activities;

Commercial Zone Purpose

- To provide for large floor area retailing and service industries;
- To provide for a changing diversity of generally non-residential uses reflecting the transition between other Business zones and inner residential areas;
- To allow for land extensive uses such as car yards, warehouse and showrooms in the areas of high traffic volume and high passing visibility; and
- To allow good quality building stock to be used for less land extensive central service uses such as offices and specialist wholesaling uses.

Local Business Zone Purpose

- To provide for retailing, offices and community services serving the local area;
- To maintain, reinforce and enhance the function, character, appearance and distinctive qualities of each of the identified local business centres as follows:
  - the Elizabeth Street area, North Hobart as a day time local shopping area and night time restaurant destination with neither function becoming dominant;
  - the Sandy Bay shopping centre as the main shopping and commercial focus for the southern suburbs of the city;
  - the Lower Sandy Bay local centre as a small, vibrant shopping centre contained within a setting of parklands and nearby beaches;
  - the South Hobart local centre as a small centre for local shopping and community facilities such as local shops and cafés;
  - the Fern Tree village centre as a small village centre for commercial and community facilities which cater for the needs of residents and visitors to Fern Tree;
  - the Mt Nelson local centre as a small centre for local shopping and community facilities such as local shops, medical and education related services; and
- To ensure conflict between adjoining commercial and residential activities is minimised.

Hobart City Council Strategic Plan 2008-2013

Hobart City Council (2008)

Objective

The key elements of this Strategic Plan are drawn from the 2025 vision for the city developed in consultation with the community and key stakeholders. The 2025 vision has been translated into a series of Future Direction Statements and 20-year strategies. This has been documented as the Hobart 2025 Strategic Framework.

Activity Centre Issues

Relevant future direction statements, outcomes and policies are outlined below.

Future Direction 3

In 2025 Hobart will be a city that works effectively to lead an integrated approach to the planning and development of the metropolitan region. Partnerships will be created with governments, the private sector and local communities to achieve significant regional, city and community goals.

Relevant future Directions 3 outcomes:

- An integrated approach to the planning and development of the wider metropolitan region; and
- Partnerships with governments, the private sector and local communities in achieving significant regional, city and community goals.

Policies include:

Promote an integrated approach to the planning and development of the wider metropolitan region by governments.

- Lobby the State Government to pursue regional planning and development consistent with the Better Planning Outcomes Framework;
- Take a leadership role to advance regional planning and encourage a consistent approach to regional planning and development; and
- Ensure Council's governance approach to planning across all Council activities is integrated and contemporary practice.

Local government in the region will speak with a united voice on integrated regional planning and development.

- Encourage the Southern Tasmanian Council's Authority (STCA) in developing a regional vision for planning and development; and
- Actively participate on the STCA in the development and implementation of regional and metropolitan strategies.

Future Direction 5

Integrated approach to transport planning within the city and across the wider metropolitan region.

Policies include:

(5.2.1.) Link land use and transport planning at a strategic level and pursue a regional approach to integrated transport planning that includes all spheres of government.

- Develop a response to the Southern Region Transportation Plan; and
- Assess the impact on Hobart's transport planning of major developments outside the city's boundary.

Economic Impact Assessment of a DFO at Hobart International Airport

SGS Economics and Planning (2006)

Objective

A thorough assessment of the economic impacts of the location of a DFO "bulky goods" retail development at the Hobart International Airport.

Activity Centre Issues

Traditionally, Hobart CBD has been the main retail centre of the region. In the last decade or two it has witnessed the emergence of regional centres in the suburbs of Glenorchy, Clarence and Kingston. Also, in the former industrial areas near Glenorchy and along the main routes to Hobart increasing numbers of bulky goods retailers have been established. The CBD still functions as the main retail centre of (southern) Tasmania.

Impacts expected to arise from the development of this large excess in retail capacity at the outer edge of Greater Hobart include:

- Increased travel costs: the estimated weighted average extra round trip travel distance is about 28 kilometres giving an estimated 25 million km per year in extra car travel.
- Loss of property value and rates in existing centres: with turnover down below viable levels in many centres, there is risk of closure and high vacancies with a resulting major decline in property values, particularly in affected retail sectors in Clarence, Sorell and Hobart.
- Distortion of development patterns: the presence of so large a development and its impact on travel patterns will inevitably create pressure for more development in this vicinity, although this will be more expensive to service and remain isolate by the Meehan Range from the developing urban fringe.
- Inequitable impacts for non-car owners: while car owners may be prepared and able to shop at the new developments, they are effectively unserved by public transport and inaccessible to non-car owners and drivers. This applies equally to accessibility for employment.
- Degradation of the retail hierarchy: the scale and character of the development will inhibit further development of shopping within the currently well established hierarchy in Hobart, reducing suitable local shopping for residents within established catchments.

Finally, the report notes that Greater Hobart is fortunate to have its three main shopping areas very well served by public transport providing good access to about 75% of the urban population.

Centre Details

In total the Plan aims to develop 73,000 sqm of retail space at Holyman Avenue, Hobart International Airport. The development includes supporting facilities such as drainage and water treatment facilities, on-site physical services, parking area for approximately 2,300 cars and onsite road and other civil works.

Key Regional Infrastructure

In addition to the HIA Plan, proposed developments that have been submitted and/or approved by the Council are:

- Homemaker Centre at Cambridge development site of Prudentia Investments (200 jobs, 39,000 sqm retail floor area, $50 million investment, plan is approved);
- Hydro Tasmania Consulting office complex with a light industry workshop and storage centre (approx. 370 jobs, plan is approved);
- Aurora Energy operations centre (under construction), and;
- Research laboratory and processing plant for Marinova.

Hobart City Council Economic Development Strategy, 2009 - 2014

Hobart City Council (2008)

Objective

To develop a succinct set of actions that the Council can meaningfully engage in to assist in economic growth for the City, its residents, workers and the wider Tasmanian community.

Activity Centre Issues

The economic development strategy outlines the range of enabling roles that the HCC will play in supporting economic development. These include a number of actions that will support the implementation of any activity centres strategy.

Specific enabling actions identified by the Strategy include:

2009

Assess the possible range of demand for additional commercial, retail, residential, educational, health and other space in the city centre for the next 50 years with indications for the longer term based on a range of scenarios. The implications of a range of growth scenarios should be considered from no growth to continued growth and the likely causes of each. This would be based on the combination of past trends, views of the business and development community, and views about the desirable future development of the City from Vision 2025 and other past investigations. It would take into account the relationship of the inner city to the developing outer Local Government Areas in Greater Hobart.

2010-12

Identify the vision and objectives for different sectors within the city centre including retail, private office development, government offices, health, leisure/recreation/the arts, etc.

2013

Identify key success factors and formulate catalyst projects in strategic locations that can initiate the activity in the short term (up to 5 years) required to achieve the visions and objectives and target specific investors (government or private) that can make them happen.

Select and widely promote a preferred future with establishment of policies (infrastructure including transport investments, etc, and statutory planning if needed) required to steer future development as desired.

Hobart Gaps and Opportunities

SGS Economics and Planning (2006)

Objective

The document has two objectives:

- To document the current economic base of the City of Hobart, the relative contribution of different sectors and their key linkages; and
- To look at gaps and growth opportunities, further understand how the economy of Hobart links to the rest of Southern Tasmania and the state, and to identify areas that the Council should concentrate on and why, with reference to successful initiatives elsewhere.

Activity Centre Issues

Hobart City is a significant net exporter of retail services to other parts of Greater Hobart, and to the state. In 2001 Hobart accounted for 33% of employment in food shopping, 48% of employment in motor vehicle retailing and 54% of employment in other retailing in Greater Hobart, compared to about 25% of the population.

As a general rule, consumers will shop at the closest and most convenient centre that meets the range of needs on any shopping trip. While they are more attracted to larger centres where they can make all purchases at one stop, they will generally not travel further than they have to get to such a centre. Thus the shoppers in the CBD are more likely to be people who work in the city than suburban residents that travel to the city to shop.

The Hobart Economic Development Advisory Forum in response to early data and drafts of this report and their own knowledge of the Hobart economy identified three particular areas of need:

- A strategic urban land use and infrastructure plan for the City;
- Increased promotion of key opportunities; and
- Strengthening cooperative links to the region including other Councils, other levels of government and key organizations.

Centre Details

Hobart City hosts about 25% of the Greater Hobart population but over 45% of the total retail employment in 2001. This shows the extent to which residents of Greater Hobart shop in the City.

Employment in the retail sector in the City of Hobart was 5,491 in 2001, the second largest sector by employment.

Hobart Gaps and Opportunities Analysis – 2008 Update

Hobart City Council (2008)

Objective

To use 2006 Census data and other available information to update the 2006 SGS Gaps and Opportunities Analysis report.

Activity Centre Issues

Accessibility to the CBD is highlighted as a critical issue in ensuring the ongoing maintenance of strong customer patronage through CBD retail stores. In recent years there has been a strong growth in the use of the Council CBD car parks, such that increasingly they are full during many weekdays. There have been various estimates of the number of spaces the CBD is short, in the order of 2000. While CBD workers are a major source of CBD shoppers, it is important to keep the CBD accessible to those that do drive to the City to shop.

The major requirement for future CBD retail success, however, will be the need to maintain and grow CBD employment and to appeal to City workers.

Central Area Zoning Review – Stages 1 to 5

GHD Pty Ltd (2005)

Objective

The five reports review the purpose and characteristics of the Central Business Zone, resulting in recommendations for the zoning and commensurate design standards.

Activity Centre Issues

Purpose of Central Business Zone

- To maintain and strengthen the primary shopping centre of Hobart, in which major retailers and specialty shops and services are supported by convenience shops, restaurants, take away food shops and hotels to serve the work force and visitors, all with convenient and safe access to public transport;
- To encourage residential and tourist accommodation uses to establish above street level in the zone as a means of increasing activity outside normal business hour; and
- The area should be primarily determined by intense activity at pedestrian levels with shop windows offering interest and activity to pedestrians.

Purpose of Commercial Zone

- To provide for large floor area retailing and service industries;
- To provide for a changing diversity of general non-residential uses reflecting the transition between other Business zones and inner residential areas;
- To allow for land extensive uses such as car yards, warehouse and showrooms in the areas of high traffic volume and high passing visibility; and
- To allow good quality building stock to be used for less land extensive central service uses such as offices and specialist wholesaling uses.

Parking Standards and Provisions Review

J Douglas & Associates Pty Ltd (2000)

Objective

Review of car parking provisions in the City of Hobart and associated impact of new development. The document specifically analysed the centres of Lower Sandy Bay, Lenah Valley and North Hobart.

Activity Centre Issues

Survey results and market analysis concluded the following for all centres:

- Most visitors travelled to shopping centres on a daily basis or several times a week;
- Shopping was the main purpose for visiting centre;
- Convenience retailers such as newsagents and corner stores were most visited;
- Over 70% travelled to centre via car with another 20% walking; and
- Attitude and behavioural surveys affirms these suburban shopping centres primary function for frequent and regular short term convenience shopping for people travelling by car.

Centre Details

The three centres are typical of neighbourhood retail centres offering lower order goods and services such as:

- Supermarket, butcher, bakery etc;
- Newsagents and corner stores;
- Post office;
- Cafes, restaurants and takeaway;
- Pharmacy;
- Bank; and

- Small service retailers such as hairdressers and automotive repairs.

Major tenants include a Coles supermarket (2,100 sqm) at Sandy Bay and a Purity supermarket at New Town (5,320 sqm).

Central Service Area Review

Frazer Read (1998)

Objective
To examine the purpose and nature of inner city mixed central service areas, evaluate policy frameworks and recommend planning controls for their ongoing viability and efficiency.

Activity Centre Issues
The growth of the city has occurred in roughly a north south orientation restricted by physical restraints. The effects of suburbanisation and decentralisation are also apparent. It can be argued that decentralisation of retailing and residential activity, reflected in the growth of Clarence, Glenorchy and Kingborough, has removed much of the pressure for expansion of Hobart's core.

Although, it is not expected there will be any significant pressure for expansion in the short to medium term- peripheral areas to the CBD are necessary to provide commercial, wholesaling and light industrial uses to serve the CBD.

Survey results and analysis concluded the following:

- Generally business operators and residents within the central service area are content with its operation and mix of uses;
- Improvement indicated parking provision and the appearance of the area as main issues for Council's consideration; and
- Development in the area has been fairly static over recent years.

Centre Details
Within the City of Hobart, warehousing, wholesaling, light industrial and service uses are provided for in areas zoned Central Service under the City of Hobart Planning Scheme 1982. This zoning occupies areas to the north and south west of the CBD in the 'frame area' adjacent to inner residential areas of North and West Hobart and
Glebe.

Typical businesses that serve the CBD include small offices, shops, hardware stores and used car yards, although a number of use with a regional role include specialist wholesalers, larger offices and new car yards and showrooms.

At a conceptual level, common principles relevant to many central service areas of cities and applicable to Hobart. Essentially, these principles relate to the efficient use of the existing building stock resources, encouraging the displacement of residential occupation and minimising detrimental effects between uses.

Planning Scheme Density Study **SGS Economics and Planning (2001)**
Objective The aim of this report is to recommend the most appropriate planning tool(s) to manage development density in a Hobart City Council context.
Activity Centre Issues The review assesses the current Hobart Planning Scheme's approach to density management, with a focus on the plot ratio, and bonus plot ratio methodology. This methodology is relevant to the extent that higher level activity centres often require higher density commercial and residential precincts. Plot Ratio is an indirect means by which to manage Hobart's density planning objectives. The quantitative Plot ratio standards set out in the Planning Scheme have an indirect relationship to statements of character and built form. Plot ratio controls are generally in excess of demand requirements and hence their effectiveness as a mechanism to control density is to a large extent invalidated. The Bonus Plot ratio system used in Hobart is subjective, is rarely used nowadays and adds another layer of complexity and uncertainty in the planning system. The review argues that there is need for a more 'guidelines led' approach accompanied by more collaborative approvals processes. This would need to be backed up by a set of relatively conservative 'acceptable solutions' in the scheme. Also required would be clear performance criteria to assist the exercising of discretion to waive 'acceptable solutions'.
Commercial and Residential Zoning Review **Hobart City Council (2005)**
Objective This report documents the findings of the various reviews of the Precincts zoned Commercial & Residential under the City of Hobart Planning Scheme 1982.
Activity Centre Issues The study identifies the objective of the commercial and residential zone as: "to provide for a diversity of commercial and professional uses and some important associated residential uses at densities responsive to the character of historic areas and buildings and/or adjoining Precincts." A total of 6 Precincts are contained within the Commercial and Residential Zone and the Statement of Desired Future Character for each of those Precincts is as follows: **The Elizabeth Street Precinct – No 8B** "The Precinct should evolve as a retail and community service area between adjacent residential Precincts. New development should be of lesser density than that to the south and blend with nearby residential areas."

The Macquarie-Davey Precinct – No. 11B
"The Precinct should continue to function as an area for offices and institutions together with the protection of residential uses and the encouragement of its further development.
The overall townscape of the Precinct derives its character from Georgian and Victorian town houses and cottages. New development should respect this existing streetscape character."

The Barracks Precincts - Nos. 12A and 12B
"The Barracks Precincts should continue to be dominated by the Barracks complex, surrounded by an inner city mixed use area with the main uses being commercial and administrative. The present diversity of activities should be sustained; uses not presently established in the Precincts should be excluded.
On Hampden Road and within the Anglesea Barracks (Precinct 12A) any new building work should reinforce the predominant character of existing 19th Century buildings.
Development in Precinct 12B should reinforce the existing character of the residential scale buildings surrounded by extensive landscaped open space; the visual prominence of the historic wall and chimney in Sandy Bay Road should not be diminished."

The Elizabeth Street North Precinct – No. 16B
"Precinct 16B (north of Federal Street) should continue as a mixture of residential and business use with existing buildings converted to flats or office uses. Local services and community uses will also be appropriate. Buildings should be set back from the street to allow a landscaped frontage and to preserve the character of existing and historic buildings. New development should not exceed two storeys and should be of a scale and design which is sympathetic to the existing development."

The New Town Road Precinct - No. 18
"The Precinct should continue to be an appropriate location for local shopping facilities and major road commercial uses as well as for residential flat development. Sub-regional shopping facilities and industrial development should be restricted generally to existing establishments.
Increased provision of seating and shelter for pedestrians is desirable, as is an improvement to the quality of the townscape by the landscaping of street frontages."

Pertinent recommendations made by the review included:

- The type of uses permitted or discretionary in the Commercial and Residential Zone under the current Planning Scheme are generally considered appropriate for the future of the Precincts currently within that zone and should be similar under the new Scheme. The exception to this is retail uses which are recommended to be discretionary to avoid the development of 'retail strips' along major arterial roads within the zone which may have adverse impacts on traffic flow / congestion and the viability of existing retail centres.
- Planning scheme provisions should continue to require the provision of on-site parking for new development (new buildings, alterations/extensions and changes of use) except where there would be adverse impacts on the streetscape or heritage values.

The review also included the New Town Commercial Centre study as a supplementary report. The report found there to be little demand to justify the encouragement of a commercial centre in the New Town area as it is located close to Moonah, North Hobart and Hobart centres. These all provide established retail and commercial services to the people of Hobart within a convenient distance. In addition, if there was to be any significant intensification of commercial activity in this area, it would most likely be to the detriment of these other established areas.

Sullivans Cove Planning Scheme

Sullivans Cove Waterfront Authority (1997)

Objective
Identification of the overall strategic planning direction for the sustainable development of the Sullivans Cove Planning Area.

Activity Centre Issues
The Planning Scheme outlines parameters for the planned function and role of the Cove. These incorporate both retail and commercial elements.

The preferred future urban character of the Cove are outlined as follows:

- The port operations will continue to be a significant economic activity in the Cove;
- The integration of port and transport activities with emerging technology based industries will be fostered and supported;
- Maritime activities will be encouraged in the Central Cove area;
- The future development of educational, artistic and cultural activities and facilities within the Cove also presents potential for economic growth; and
- A range of other economic activities will be promoted in the Cove, including tourism, retail and other commercial development, Civic and administration activities, research and development, arts and craft, and technology based industries.

These are reflected in the guiding principles for future development in the cove:

- Sullivans Cove shall continue as a dynamic and evolving working port, also as a fishing and yachting harbour, cultural centre, recreation and entertainment district, centre of government and a place for commerce and living.
- It shall continue to cater for public activities in streets and in buildings at street level.
- It shall display its history, and have a life beyond 'nine-to-five' hours.
- The activities in the Cove should positively contribute to the character of the Cove and not detract from the operations of a working port. Activities and associated development should not adversely impact on pedestrian and other forms of movement through the Cove, access to the water edge, views, and the human scale environment.
- The water environment of the Cove shall continue to fulfil a significant role in the cultural life of the City, and shall continue to cater for community events such as boat races and festivals.
- The Cove should be promoted as Hobart's centre for cultural and recreational activities. Such activities shall be encouraged across the Cove, with an emphasis on cultural activities in the main Cove, including between Hunter Street and Salamanca Place and the Theatre Royal, Museum and Art Gallery.

The conservation of heritage in the built and spatial form of the Cove is also important, not only in a cultural sense, but also in an economic sense, for the Cove is an important attraction to tourists and other visitors to the State

2.1.5 Huon Valley

Key Issues

- Importance of relationship with Kingsborough (economic flow through to Huon Valley);
- Huonville is identified as a Major Settlement with a focus on agriculture services, commercial services, and water based tourism;
- Agriculture is the major employment sector;
- Steady positive population growth is anticipated;
- Identified shortage of industrial land and accommodation for tourists and seasonal workers; and
- Identified need for improved telecommunications and technology infrastructure.

Huon Land Use and Development Strategy **GHD (2007)**
Objective The strategy was to form a basis from which an integrated planning scheme could be constructed for the whole municipal area.
Activity Centre Issues The relationship between Huon Valley and Kingborough is very important to the successful development of the municipal area. There is a strong correlation between the economic development in Kingsborough and flow through effects to the Huon Valley region. Planning policy and legislative framework in Kingborough also has implications on Huon Valley. The local area is somewhat divided by two different communities characterised by different values and attitudes. The Cygnet precinct is influenced by arts and culture and embraces a more contemporary lifestyle. In contrast, Geeveston is still influenced by traditional industries and primary production. Planning policy must also address the needs of low income households and provide an adequate supply of affordable housing. There is a current undersupply of affordable accommodation that requires attention.

Desired Activity Centre Attributes

The document indicates the preferred settlement strategies for specific settlements as follows:

Major settlements (Huonville, Cygnet, Franklin, Geeveston, Dover)

Development within existing service areas and where infrastructure is planned is preferable. Land provided for commercial, community, industrial and residential use will be identified within urban boundaries. A number of 'streetscape' opportunities are also apparent. Themes for each settlement are defined by the following:

- Huonville/ Ranelagh – agriculture service centre, commercial hub, and water based tourism,
- Cygnet – art and crafts, and culture;
- Franklin – riverside recreation, heritage, and boat building;
- Geeveston – forestry service centre, forest heritage town, and tourism; and
- Dover – maritime and fishing centre, tourism and recreation gateway for 'the south'.

Minor settlement (Port Huon, Glen Huon/ Judbury, Southport, Grove)

These towns are limited to strictly in-fill development. Environmental constraints and limited servicing reduce the scope in which development can occur. Apart from minor upgrades in Port Huon, there are no plans for infrastructure development due to environmental consequences.

Hamlet and smaller settlements

Low density living and a rural lifestyle is to be promoted in these areas. Residential development should support primary land uses and be of modest scale and form.

Centre Details

Over the past few decades, Huon Valley has defied State trends to remain a steadily growing region with an annual growth rate between 0.5- 1%. There is a high median age of 39 with a significant proportion of the population aged between 30- 55 years.

Population forecasts indicate steady, positive growth will continue. An increasing ageing population is also expected with strong positive growth in the population aged 55 and over and negative growth for those aged below 55 years.

Key Regional Infrastructure

- Sewerage- major towns have reticulated sewerage service whilst smaller towns rely on disposal through septic tanks or domestic-sized treatment plants.
- Water- water supply is more extensive and most towns are serviced by reticulated water. Only the small settlements of Verona Sands and Southport do not have access to reticulated water services. In many towns, current water infrastructure will require upgrades to support further development.
- Stormwater – stormwater reticulation is poor across all areas of the municipal region. There are no full reticulation systems and no sediment or litter removal systems for urban stormwater.

Huon Valley Economic Development Strategy- Working Draft **GHD (2007)**
Objective The strategy is designed to direct future economic growth in the Huon Valley with the vision of becoming *'a vibrant economy with a quality rural lifestyle'*.
Activity Centre Issues Dominant industries of employment are agriculture, forestry and fishing (20%); manufacturing (13%); and retail trade (12%). The economic well being of the Huon Valley is underpinned by the following industries: • Agriculture; • Aquaculture and fishing; • Tourism; and • Forestry.
Centre Details Generally, incomes are below State averages with an average family income of $874 in comparison to $1,032 for the rest of Tasmania. Labour force participation is noticeably higher in the male population (62%) than females (47%). Due to the ageing population, only 57% of the total population above 15 years of age were in the labour force. The unemployment rate has been on the decline since 1991, dropping from around 17% to just above 7% in 2006. The main economic drivers in the municipal area are characterised by the following : **Agriculture** • 77,335 ha of agricultural land use; • Industry output dominated by apple production with $38,250,000 of the total $42,495,000 industry value attributed to apples; • Direct employment of 601 persons; **Aquaculture and fishing** • 25 marine farms and 333 ha of coastal water for marine fishing; • Directly employing an estimated 400 people; • Approximate value of aquaculture $225 million; • 30 operating fishing vessels directly employing 219 people; • Approximate value of fishing is $40 million annually; **Forestry** • 122,512 ha of forestry land use; • Direct employment of 551 workers; • Estimated industry output of $19.5 million; • Significant flow-on effects to the manufacturing sector and employment; **Tourism** • An estimated total of 510 businesses are defined as tourism businesses; and • Total value of industry is estimated at over $52.4 million.

Key Regional Infrastructure
Specific shortfalls and recommendations were made in respect to infrastructure provision: • Availability of industrial land; • Availability of tourist accommodation; • Availability of accommodation for seasonal workers; • Upgrade telecommunications and technology infrastructure; • Opportunities to better utilise natural and recycled water; • Improved infrastructure to encourage increased use of natural waterways; and • Improve and upgrade Southern Road network.

2.1.6 Kingborough

Key Issues

- One of states fastest growing Councils attracting many young families;
- Need for better public space in Kingston;
- Need for improved community facilities;
- Central Kingston intended to be the primary focus for Kingborough (civic, commercial, administrative, entertainment, and public transport facilities);
- Master planning for Kingston indicates a need for a trebling of retail and commercial floorspace by 2031, with implications for the form of development, and the need for the Kingston High School site; and
- Residential growth expected to be accommodated to the south and west of Kingston Central.

Kingborough Central Area Master Plan Review **Tony Ferrier, Kingborough City Council (2009)**
Objective The review was undertaken largely in response to the State Government's decision to relocate the Kingston High School. This could release a large area of land for a range of purposes – commercial, community, residential and open space. The review was to review development opportunities in the region resulting from the latest government initiative.
Activity Centre Issues Public comment was endorsed by Council after the release of the Master Plan and the following issues were raised: • Point of difference – there were many comments that the plan was simply 'more of the same' and failed to offer anything that was uniquely suited to Kingborough; • Public open space – currently there an inadequate supply of public space and the proposed Town Park is unsuitably located on the edge of the CBD;

- Community facilities – there was concern the plan focused too heavily on retail development and not community facilities such as libraries and health centres; and
- Public transport – there appeared little regard for promoting public transport, reinforcing car travel dependency.

Desired Activity Centre Attributes

The report outlined the four core planning principles that summarised the planning objectives as defined by the Master Plan:

- To create a viable and sustainable town or sub-regional centre south of Hobart – to complement population growth and meet long term community needs;
- For Central Kingston to be the primary focus for civic, commercial, administrative, entertainment and public transport facilities in Kingborough;
- To meet the future community and commercial needs for additional land or "floor space" within an expanded town centre; and
- To build on past master planning efforts and best utilise the existing public infrastructure.

Centre Details

The Master Plan defined the hierarchy of Kingborough's commercial areas as follows:

Level 1: Primary destination centre – Kingston CBD.

Level 2: Convenience centres – Kingston Beach, Kingston Town, Blackmans Bay, Margate and (in future) Huntingfield.

Level 3: Local centres – Taroona, Snug, Kettering, Woodbridge etc.

Kingborough Central Area Master Plan Review- Final Report

Collie Pty Ltd (2008)

Objective

The purpose of the study was to provide a framework to guide the management and development of commercial, business and community activities in the region.

Activity Centre Issues

The study identified a number of limitations in regard to commercial and retail facilities. The following estimates show the current undersupply of retail and commercial floorspace in Kingston:

- 17,000 sqm for core retail goods and services;
- 7,000 for retail bulky goods retail; and
- 1,000 sqm for community and commercial services.

This has resulted in many retailers overtrading and has resulted in overcrowding, parking and traffic problems.

To meet retail and commercial floorspace demands come 2016, it is expected a further 35,200 sqm will be required. By 2031, this figure is anticipated to rise to 66,200 sqm. Existing land stocks in the Central Kingston area will not accommodate this level of floorspace provision. Therefore, the Kingston High School site needs to be consolidated into the town centre precinct if demand is to be met by supply.

Desired Activity Centre Attributes Kingborough is strategically located to develop into a key regional centre to service a wider hinterland. Historically, it has played an important role in service provision to surrounding areas is located adjacent to major regional roads. Community consultation identified two important objectives from a community perspective: • To develop a vibrant town centre with a high amenity of community space; and • Upgrade the built environment to improve vehicle and pedestrian accessibility, convenience and safety.
Centre Details It is anticipated the LGA will experience strong population growth. Forecast estimate the local population to rise from 31,730 in 2006 to 44,170 by 2031. To accommodate this growing population, residential development is most likely to be located south and west of the Central Kingston area. The report summarised the retail and commercial role in each centre as follows: **Central Kingston** (main precinct) • There is approximately 30,000 sqm of activity centre floorspace, anchored by major shopping centres and discount department stores; • Recent re-development of the Channel Court shopping centre has improved pedestrian access and visual amenity; • Construction of an additional 15 specialist stores is expected to be completed by 2009; **Kingston Town** • Site is physically isolated from existing centres and is free standing within the residential population; • There is around 6,800 sqm of activity centre floorspace which comprised mostly of supermarket, fuel and liquor retailing; **Mertonvale Circuit** • The centre is comprised of bulky goods and homemaker retailing; • Accessibility is vehicle based with limited pedestrian access; **Huntingfield** • There is approximately 7,000 sqm of retail, 14,000 sqm of commercial and a further 7,000 sqm of industrial floorspace spread over a several sites; • Instead of acting as a centre, it is an agglomeration of peripheral activities dissected by several major roads; and **Browns Road** • An industrial area with around 12,000 sqm of industrial floorspace;
Key Regional Infrastructure • Southern Outlet road – provides access to Kingston from Hobart and is linked to the Channel Highway; and • Channel Highway – is the main link between Central Kingston and other Kingborough settlements.

Kingborough Strategic Plan 2004- 2009 Kingborough City Council (2009)
Objective The purpose of the Strategic Plan is to ensure that a clear direction is defined to improve services and outcomes for the community.
Activity Centre Issues The document makes reference to Kingborough as one of the State's fastest growing Councils with growth anticipated to continue beyond 2009. In particular, the region has attracted many young families with a high proportion of those aged between 0-14 years and 30- 39 years of age.
Desired Activity Centre Attributes The strategic framework of Council defines particular areas of strategic focus as outlined below. **Community** The Council's goal is to continually improve the range and quality of health, social and cultural service provision. Key outcomes related to this goal include coordinated and effective community services; improved community health and well being; youth development; and a high standard of recreational and sporting facilities. **Economic** A diverse and competitive base of employment generating industries and businesses is the economic vision of the region. Outcomes of highest priority to realise this vision include tourism growth; increase of retail outlets; strong local business and industry; and improved infrastructure. **Environment** Council aim to protect the region's natural assets to provide an attractive environment for residents and tourists alike. In promoting this future, Council seeks to improve the effectiveness of waste management; adopt a collaborative approach to environmental management; protect and enhance the natural environment; and improve the attractiveness and function of streetscapes and open spaces.
Centre Details Kingborough is largely a dormitory area for workers in the major commercial, retail and administrative centres of Hobart and Kingston. Rapid urban growth has ensued from the construction of the Southern Outlet road connecting Hobart and Kingston with a shortened communing distance.

2.1.7 Sorell

Key Issues

- Sorell is intended to grow to be the regional retailing, administration, community services, and community centre of the LGA.
- It is intended to support tourist growth; and
- Promotion of improved transport, via road, between residential areas, business centres, schools, and the Orielton Lagoon.

Sorell Planning Scheme, 1993 **Sorell Council (2009)**
Objective The overarching objective of the Scheme is to manage the transition from a municipality dominated by rural and holiday uses to one with a significant urban component whilst ensuring an appropriate level of social and physical services and minimal environmental impact.
Desired Activity Centre Attributes Area specific objectives reflect the desired attributes of the urban form in each sub-region: **Sorell** • Grow township as the regional retailing, administration, community services and community centre of the municipality; • Grow tourism development in accordance with the Kinhill Orielton Lagoon Project; • Improve transport infrastructure, particularly road linkages between residential areas, business centres, schools and the Orielton Lagoon; **Midway Point** • Protect the coastal areas and foreshore vegetation; • Improve access s to residential areas, especially areas along the foreshore; **Penna Valley, Orielton and Environs** • Protect existing rural and agricultural enterprises; • To promote low density development amenity were possible; **Southern Beaches (Lewisham to Primrose Sands)** • Consolidate residential development within existing settlement nodes; • Facilitate economic infrastructure to improve the provision of commercial, community and retail activities in the region; • Enhance access to recreational areas of regional significance; **Dunalley** • Facilitate the development of the retail base as a 'gateway' to the Forestier and Tasman Peninsulas; • Protect and enhance scenic attributes of the region and recognise the value of the fishing industry; **Minor Rural Settlement (Forcett, Nugent, Copping, Bream Creek and Kellevie)** • Restrict future residential development to areas within or adjacent to existing settlements; and

- Protect and retain the rural character of these settlements;

Rural areas

- Protect and promote the rural land uses and support primary industries;
- Provide land resources for residential and commercial requirements and other urban uses such as refuse disposal and community grounds;

Foreshore and Coastal Areas

- Maintain coastal ecosystems, landscape and processes;
- Prevent residential development in coastal areas except in established nodes;
- Improve the access to the foreshore and for the purpose of aquaculture uses; and
- Prevent the removal of vegetation and alteration of coastal features.

Sorell Township Urban Master Plan

Collie Pty Ltd (2009)

Objective

The Master Plan was prepared to guide development in the Sorell Township and sets out a framework for sustainable land use and transport over the next 22 years and beyond.

Activity Centre Issues

The Sorell town centre is the primary service centre for the Municipality, largely serving the role as a gateway and regional service centre. The study by Collie raises the following issues:

- Sufficient retail and commercial floorspace can be accommodated on approved sites in or adjoining established commercial areas;
- Community facilities can easily be accommodated in the township, particularly in the community services precinct;
- There is a critical need to increase the supply of industrial land and future reserves;
- The regional highway and traffic network needs to have a clear road hierarchy with the development of a by-pass route; and
- There is a sufficient supply of residential zoned land and reserves to meet township requirements to 2031.

Desired Activity Centre Attributes

The study identified numerous recommendations, divided into the following areas of focus:

Sorell Township

- Enhance the identity of Sorell as a vibrant regional township;
- Create a sense of place and arrival;

Transport and Movement Planning

- Implement a hierarchy for roads in the town centre, including a distributor road network and commercial streets;
- Provide effective approach routes and entry points into the township;
- Restrict the intrusion of regional flow through traffic into the town centre;
- Create a by-pass route for regional flow through traffic;
- Enhance car parking in commercial areas;
- Improve walking and cycling links;

Residential Growth and Development

- Implement a walking and cycling network to connect residential areas to schools, facilities and the town centre;
- Deliver a diversity of housing and living opportunities within and adjoining the town centre;
- Adopt the framework for new residential precincts that ill be added in future periods of growth;

Industrial Growth and Development

- Propose location options for the development of the new industrial precinct;
- Facilitate the development of the industrial precinct;
- Develop a marketing and investment opportunities plan;
- Facilitate industrial development and diverse business opportunities;

Commercial

- Ensure development is compact, structured and well organised with clearly defined precincts;
- Enhance the role of the town centre as a gateway service centre for the region;
- Enhance the provision of interesting and unique attractions for residents, tourists and visitors;

Environmental Sustainability and Open Space

- Maintain access to open space and parklands;
- Restrict the loss of rural land;
- Protect the Orielton Lagoon as an environmental resource;

Community Facilities

- Upgrade and improve the diversity of facilities and services in the town centre;
- Improve meeting places, seating areas and general urban design; and
- Maintain high levels of pedestrian accessibility and amenity.

Centre Details

The Sorell Regional catchment is expected to increase from approximately 18,830 people in 2006 to 28,110 people by 2031; an increase of approximately 49%. The Sorell Township itself is expected to increase from approximately 1,650 people in 2006 to 3,660 by 2031, a projected increase of 122% over the period. A survey (in October 2008) of Sorell Township floorspace found a total of 25,620sqm of activity centre commercial floorspace of which 15,870sqm was classified "non-shopfront". This gives a figure of 9,750sqm of activity centre "shopfront" floorspace (excluding the approved and commenced Coles supermarket).

2.1.8 Regional Documentation

This section deals with various sub-regions of the study area (the Southern Tasmania region). The first document below concerns the northern sub-region while the second deals with the east coast sub-region.

Key Issues

- Promotes an integrated network of centres to cater for growth;
- Bridgewater/ Gagebrook is intended to be a major focus for infill residential development;
- Greenpoint is intended to be reinforced as the focus for retail and community uses;
- New Norfolk to be a key centre for the west and north west;
- Highlight opportunities associated with Brighton Bypass (major retail and commercial to complement enhanced amenity and town centre role);
- Focus on Bridgewater industrial growth supported by Transport Hub;
- Reinvest in further residential development in New Norfolk, Brighton, Bridgewater, Gagebrook, Oaklands;
- Future commercial, retail, and community facilities to be at core of existing communities, with stand alone retail facilities including "big box" retailers and service centres to be rejected; and
- Centres to be accessible via public transport, or walking/cycling.

Joint Land Use Planning Initiative: Land Use Strategy Pitt & Sherry/ Parsons Brinkerhoff (2008)
Objective The Strategy seeks to facilitate planned and managed development that leads to greater prosperity, minimises land use conflicts, protects and celebrates natural and cultural values and ensure that future stresses on services and infrastructure are minimised in the four LGAs of Central Highlands, Derwent Valley, Southern Midlands and Brighton.
Activity Centre Issues The Greater Hobart area has historically spatially focussed its urban development in three broad development fronts; westwards along the southern shores of the Derwent River valley serviced by the Brooker Highway, in the Clarence municipality reliant on access across the Tasman Bridge and southwards into the Kingston area reliant on the Southern outlet. In the wider peri-urban area development has extended further southwards towards the Huon Valley, beyond the airport to Sorell and further westwards along the Derwent towards New Norfolk and northward to include Brighton. As a component of the "Live" strategy, the following policies/ strategies are nominated: • Plan and develop nominated urban areas and towns, build an integrated network of centres and cater for an increased level of demand to live in the sub-region; and • Develop the identity of a network of towns that can serve the sub-region's needs with a focus on Bridgewater/Gagebrook, Brighton, New Norfolk, Oatlands, Kempton, Bothwell, Hamilton, Campania and Ouse.

The sub-region is remarkably diverse in its pattern of settlement — consisting of the urban and peri-urban centres of Brighton, New Norfolk, Old Beach, Bridgewater and Gagebrook, the historic towns of Oatlands, Hamilton and Bothwell and the isolated settlements of Ouse and Miena. The historical development and the variety of roles performed by these settlements all contribute to the diversity of the Region. In the sub-region, the majority of residential growth has been in Brighton, but growth has also occurred in the Bagdad-Mangalore area, New Norfolk and the Great Lakes area (generally shack development).

Bridgewater-Gagebrook
This area will be the major focus for infill residential development, utilising the existing zoned vacant residential lots to increase the diversity of housing options and target age groups underrepresented in the area. Reinforce the Greenpoint location for a retail and community centre development focus.

New Norfolk and the Derwent Valley consolidate and strengthen New Norfolk's role as a key regional service and commercial centre for the areas to the west and north west. The Granton area of the Derwent Valley is not physically connected to the New Norfolk urban centre and further growth of this area will not strengthen the role of New Norfolk as a sub-regional centre, conflicting with the strategic direction mentioned above. However it must be acknowledged that Brighton central business district and residential areas Greenpoint is developing as a major retail and community hub for Brighton Council. With the construction of the Brighton bypass the role and function of the Midland Highway through the Brighton commercial area will substantially change. There will be new opportunities for major retail and commercial development to complement the enhanced amenity and town centre role of Brighton.

Service Centres and Villages Residential growth in the "outlying" rural service centres and villages should be focussed around existing nodes of development and key community support infrastructure, with an emphasis on:

- Oatlands;
- Campania;
- Ouse;
- Bothwell;
- Hamilton; and
- Kempton.

As a component of the "Live" strategy, the following policies/ strategies are nominated:

- Develop the sub-region and particularly the Bridgewater area as Hobart's new industrial development area based on its transport and storage capacity, intermodal facilities and distribution hub potential; and
- The continued development of the Brighton/ Bridgewater area as a sub-regional service centre, and New Norfolk in the Derwent Valley, will support improved local access to commercial and basic services.

The demand for industrial land for transport and storage activities is and will continue to expand. Brighton is ideally situated to perform in this role of transport and storage hub. There are significant areas adjacent to the existing Brighton Industrial Precinct that are required in the immediate and medium term horizon to cater for this industrial growth.

Priorities for the sub-region include reinvestment in further residential development within the existing urban areas of Bridgewater, Gagebrook, New Norfolk, Brighton, Oatlands and the smaller towns in the whole sub-region.

Future commercial, retail and community facilities sited at the core of existing communities so as to build a sense of place. Stand-alone retail facilities including 'big box' retailers and service centres need to be rejected.

Desired Activity Centre Attributes

Consolidate new urban development to improve the delivery of public transport services. Ensure that new development is effectively provided with appropriate standards of public transport delivery (dwellings are located within 400 metres of such routes)

This will foster a liveable community. The strategy supports and encourages the majority of residents living within walking distance (1km) of basic services, such as health, education and commercial services. In practical terms, the settlements of the sub-region need to adapt their structures and services to be accessible to and inclusive of older people with varying needs and capacities.

New land uses that will generate substantial transport demands such as residential areas, employment nodes, commercial and retail space, and community facilities will need to be assessed against new criteria. Those criteria will include the level of non-renewable resource impact, capacity to provide access using transport that is not relying on large levels of fossil fuel use and the extent to which a land use contributes to building a sustainable and liveable community for all residents.

Key Regional Infrastructure

The Midland Highway is the major transport link for people travelling between the northern and southern regions of Tasmania. Along with the parallel rail network, it is also the State's major north-south freight link.

Future State (and Federal) government investment – a major intermodal freight hub and new industrial areas, transport infrastructure (rail) and road (Brighton bypass), educational facilities (new Bridgewater School), the Callington Mill Restoration project at Oatlands, and likely future water investment to secure further supplies and extend the irrigation infrastructure.

East Coast Sub-Region Land Use Framework (Draft)

Aurecon (2009)

Objective

This land use framework aims to provide information and direction for the preparation of new planning schemes thereby improving co-ordination of planning schemes across the four municipalities of Break O'Day, Glamorgan Spring Bay, Tasman, and the eastern coastal and rural parts of Sorell.

Activity Centre Issues

A four-tiered scale has been adopted whereby the future role and function of each settlement is classified as a district town, township, village or hamlet. Higher order cities and regional towns cities are excluded from this hierarchy as these functions are met by Hobart, Launceston and Sorell.

Settlement	Current classification[1]	Proposed classification
St Helens	District town	District town
Triabunna	Township	District town
Bicheno	Township	Township
Swansea	Township	Township
St Marys	Township	Township
Nubeena/White Beach [or separate]	Village / township	Township
Orford	Village	Village
Scamander	Village	Village
Fingal	Village	Village
Dunalley	Village	Village
Eaglehawk Neck	Village / hamlet	Village
Falmouth	Village / hamlet	Hamlet
Coles Bay	Village	Village
Taranna	Village / hamlet	Hamlet
Port Arthur	Village / hamlet	Village
All other settlements	Hamlets	Hamlets

[1] The current classification has been derived from analysis of the existing population levels and community facility provision. The data is included in the State of Region report.

Desired Activity Centre Attributes

District town	
Population	1000+
Utilities	Reticulated water, reticulated sewer, electricity.
Services	Local government offices; Public library; Community hall; Post office; District hospital; Fire station; Police station (full time); Ambulance; State Emergency Services; Secondary school; Primary school; Public swimming pool; Indoor sports facilities (basketball court); Golf course.
Description	District towns are the main service centres where residents of the region can access a wide range of facilities and employment opportunities. The retail offering consists of convenience and some comparison shopping.
Township	
Population	500 to 1000
Utilities	Reticulated water, electricity. May have reticulated sewer.
Services	Public library; Community hall; Post office; Medical/health centre; Fire station; Police station; Primary school; Public swimming pool; Golf course.
Description	Townships have dominant town centres which provide a number of facilities, some employment opportunities, and convenience shopping.
Village	
Population	200 to 500
Utilities	Reticulated water, electricity.
Services	Community hall; Post office agency; Doctor; Fire Station; Police station (part time); Primary school; Public swimming pool.
Description	Villages provide some basic services and daily need shopping.
Hamlet	
Population	Up to 200
Utilities	Electricity.
Services	-
Description	Hamlets have no major services and limited retail services.

The region's town centres serve as the focus for many communities, providing a range of functions including retail and other commercial businesses. The provision of cohesive town centres that are easy and enjoyable to move around will enhance the viability of commercial businesses. As this is a Land Use Framework individual issues cannot be addressed, however direction is provided as to the matters which should be addressed in structure plans, master plans and urban design frameworks.

The town centre issues which this Land Use Framework seeks to address are:

- The provision of adequate land for commercial land uses;
- The provision of compact rather than linear town centres/commercial areas;
- Movement and parking issues; and
- Urban design within town centres

2.2 Key Policy Issues

The policies and studies reviewed have identified a number of key issues that require consideration in the development of a regional activity centres strategy. Foremost of these is the need for a regionally planned and defined hierarchy of retail and commercial activity centres, reinforcing the need for this study to inform regional strategy.

Current policy considers it important to maintain the dominance of the Hobart CBD as the primary retail centre, as well as the "pre-eminent centre" for public administration, financial services, and commerce. This is at risk from the rise of outlying retail centres such as the Airport DFO and Cambridge Homemaker Centre and possible commercial office buildings at the Airport that have the potential to detract from the CBD (and other regional activity centres). At the same time it should be recognised that it is sometimes difficult to assemble suitable CBD sites for large format retail uses and the standard development pattern for these may not be an efficient use of CBD land. However the risk from competing centres is muted by the:

- location of the State Government and associated offices and services in and around the CBD;
- centrality of the CBD to all parts of Greater Hobart making it attractive to both retail and employers seeking to draw broadly from across Greater Hobart;
- good public transport links and accessibility making it attractive as a place of employment;
- pre-eminence of the central Hobart area in tourism, cultural and recreation activity;
- physical attractiveness of its setting; and
- presence of major institutions such as the University, a number of hospitals, state library etc.

In comparison, Cambridge and the Airport are only accessible by car and are well away from many parts of the Greater Hobart populations (e.g. Kingborough). The use of CBD land for higher intensity and higher order retailing, and higher employment density uses should be encouraged. There is strong policy intent amongst the documents reviewed to limit out-of-centre development, with the focus of retail and community facilities in existing centres. Policy for Clarence that promotes the role of Cambridge for bulky goods retailing and campus style office development, has potential for regional impacts undermining existing centres. It is considered that the CBD frame should support the CBD employment and commercial activities. In terms of amenity the focus for the CBD is promoting accessibility by (all modes), street level activity and activity outside of regular business hours.

The centres of Glenorchy Central, Rosny Park, Bridgewater (Greenpoint) and Kingston, are promoted as the main centres for their LGAs while the less populated LGAs highlight the importance of their main centres (Huonville, New Norfolk, Kingston, and Sorell).

The under-provision of required infrastructure and services to developing centres is an inhibitor to economic growth. Examples of under-provision may include public transport, reticulated water/ sewerage access, telecommunications and technology infrastructure, and road network capacity amongst others. The provision of these infrastructure/ services is particularly an issue in centres in outer areas, where the cost of provision is significantly higher than inner-area centres.

Subsequently, it is important to consider minimum levels of service/ infrastructure provision in defining a planned activity centre hierarchy.

Common themes in the major centres surrounding the CBD include amenity, access, and attracting office development. While office development has the potential to benefit centres like Glenorchy Central, Rosny Park, and Bridgewater, the attraction of these centres as office locations is limited, given the attractions and amenity advantages of the CBD. It is most likely that such office development will be limited to small to medium professional services, or particular businesses with a key locational requirement (e.g. businesses associated with Brighton Transport Hub or the Techno Park in Glenorchy) but these will not necessarily be based within the existing activity centres.

Access to centres is predominantly via by car with reasonable bus services to the CBD, Rosny Park, and Glenorchy, with the later two having bus interchanges incorporated into them. Smaller centres have limited bus services in comparison and lack direct services to the CBD and major centres (other than the closest). The provision of adequate car parking and traffic access appears to be an issue in the CBD, Rosny Park and Glenorchy. This is likely to continue to be an issue while these centres rely predominantly on car travel. Improved bus services will assist, and there is a policy push for improved accessibility by public transport, cycling and walking. However the details of how this can be achieve are limited apart from some intent for increased residential density around centres. There does not appear to be any policy push for significantly improved public transport or conversion of the northern rail corridor for passenger services (either rail or bus).

Lack of activity centre amenity is cited in a number of documents reviewed, particular Glenorchy, where it appears that centre development has evolved along the road corridor, resulting in a lack of amenity over time. Key issues include lack of; pedestrian amenity, attractive streetscaping, and public space. In Glenorchy and other areas (Bridgewater, and Kingston) there are concerns over the lack of a clearly defined centre and associated public space. Lack of cultural facilities and community services also appears to be an issue in a number of areas. All of these suburban centres have a significant part of their retail capacity located within inward focussed shopping centres. This can have a detrimental effect on the sense of community street life and public focus, with the exception of some of the smaller areas such as Moonah. It should also be acknowledged that “main street” retail centres can offer distinct advantages of activity, easy access, and a bustling street life when road use is balanced with centre amenity and pedestrian access.

Brighton appears to offer a number of opportunities with the proposal to develop a Transport Hub nearby and the Brighton Bypass. These projects, combined with significant residential growth capacity, provide opportunities for expanded commercial and retail activities both in Brighton and Bridgewater.

Generally residential growth areas are promoted in Brighton, Bridgewater, Kingston, New Norfolk, Gagebrook and Oatlands. Higher density residential development and infill are promoted around major centres.

Finally, the policies and studies reviewed raise the issue of activity centre inter-reliance. Historically, urban development has emanated outward from the primary activity centre of Hobart in a radial fashion. Key development fronts have been westward along the south shores of the

Derwent River Valley serviced by the Brooker Highway (and further north into Bridgewater), east through the Clarence municipality, and south through Kingston. This pattern has been largely determined by the topographical constraints of Greater Hobart. This development is reflected in the key activity centres forming along these fronts and major transport spines. Significantly however, the periphery centres are noted to be significantly affected by the economic development of more inner-centres along the same development arc. For example, a strong correlation is reported between the improved economic development in Kingborough, and flow through benefits to the periphery municipality of the Huon Valley. In establishing a regional hierarchy of activity centres, this economic flow-on effect between inner and outer centres will require due consideration.

As urban areas develop, the traditional reliance on the CBD particularly for routine retail and some other local services is reduced and a poly-centric pattern of development occurs, with new more convenient centres emerging. However, in the case of Hobart and surrounds, this pattern is hindered by the difficulty in providing cross city connections across significant physical barriers. Again, these accessibility issues require due consideration in determining a preferred network of activity centres.

Desired centre attributes for activity centres in the Southern Tasmania region are not clearly articulated in the policy or studies reviewed by SGS Economics and Planning. However some general principles were gleaned from the policy review.

General centre attributes identified by the policy and studies as desirable include:

- "...concentration of provision of goods and services at hubs linked effectively by an efficient transport system." (Glenorchy City Council, 2008);
- "...development within existing service areas and where infrastructure is planned (to meet regional requirements)..." (GHD, 2007);
- A built environment that facilitates improved vehicle and pedestrian accessibility, convenience and safety (Collie Pty Ltd, 2009);
- An improved range and quality of health, social and cultural service provision (Kingborough City Council, 2009);
- Consolidation of residential development within existing settlement nodes (Sorell Council, 2009);
- Ensure that new development is effectively provided with appropriate standards of public transport delivery (i.e. dwellings are located within 400 metres of such routes) (Pitt & Sherry and Parsons Brinkerhoff, 2008)
- "...the majority of residents living within walking distance (1km) of basic services, such as health, education and commercial services" (Pitt & Sherry and Parsons Brinkerhoff, 2008); and
- "The provision of cohesive town centres that are easy and enjoyable to move around..." (Aurecon, 2009).

The policy presents a number of common themes for improvement which are reflected in the recommended Centres Principles and activity centre recommendations. There is a distinct policy conflict between the promotion of Cambridge and Airport retailing and office development and the need to promote the primacy of the role of the CBD and other established centres such as Rosny Park and Glenorchy. This issue requires a consistent approach in order to achieve good regional outcomes.

3 Economic and Social Characteristics and Trends

This section outlines the economic and social characteristics of the area. This provides an understanding of catchment areas, demand for various types of services, and employment distribution. Structurally Southern Tasmania can generally be viewed as a two distinct areas. The urban parts of Greater Hobart consisting of the inner core of Hobart, Glenorchy, Clarence, urban areas of Brighton, and Kingborough which generally are well populated, with lower median age, experiencing reasonable growth, and have a higher participation rate and income. The exceptions are Brighton which has higher unemployment and lacks services, and Glenorchy which is expected to experience net population decline over the next 25 years. The outer areas have a rurally based economy with slow or no growth, lower participation rates, lower income, and higher median age.

There is also a clear grouping of suburbs by accessibility, due to the historical growth of Hobart out from the CBD along significant geographic constraints. The geographic nature of Greater Hobart has led to growth to the north west including Glenorchy, Brighton, Derwent Valley, Central Highlands, and Southern Midland; to the east including Clarence, Sorell, Glamorgan-Spring Bay, and Tasman; and to the south west including Kingborough, and Huon Valley.

3.1 Residential and Social Characteristics

3.1.1 Current Population

Over 2001- 2008, the Southern Tasmanian Region has experienced an average annual population growth rate of 0.9%. The estimated residential population increased by 14,308, from 2001, to 246,162 in 2008 (see Table 1). This growth is consistent with the Metro Hobart area where the population grew 12,536 to 216,250 over the same period. As of 2008, the most populous LGAs in the Southern Region are the Clarence, Hobart and Glenorchy local Councils, with Kingborough a growing contender.

Population grew 6.2% for both Metro Hobart and Southern Regions over the seven year with all LGAs reporting positive growth. As shown by Figure 3, the greatest nominal growth was shown in Kingborough, Brighton and Hobart, whilst the smaller regions of Tasman and Southern Highlands reported little change. The highest percentage change was seen in Brighton and Sorell with increase of 18% and 16% respectively, on the edges of the major urban area.

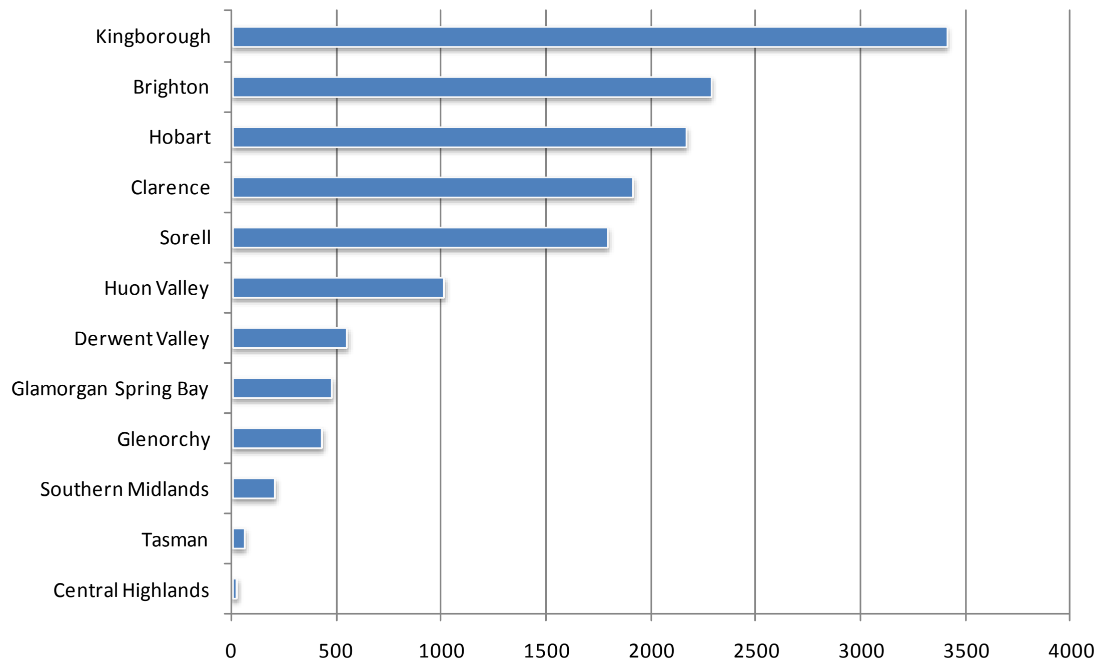
Table 1. Estimated Residential Population by LGA 2001- 2008

	2001	2002	2003	2004	2005	2006	2007	2008	AAGR
Brighton	12,915	13,028	13,205	13,640	14,030	14,364	14,822	15,198	**2.4%**
Central Highlands	2,316	2,309	2,355	2,308	2,350	2,318	2,316	2,339	**0.1%**
Clarence	49,594	49,572	49,750	50,096	50,316	50,796	51,143	51,506	**0.5%**
Derwent Valley	9,373	9,313	9,401	9,371	9,537	9,684	9,759	9,920	**0.8%**
Glamorgan Spring Bay	3,989	3,984	4,075	4,184	4,330	4,353	4,406	4,464	**1.6%**
Glenorchy	44,003	43,974	44,360	44,532	44,062	44,238	44,294	44,433	**0.1%**
Hobart	47,446	47,739	48,277	48,880	49,237	49,429	49,577	49,611	**0.6%**
Huon Valley	13,846	13,917	13,968	14,180	14,336	14,469	14,650	14,858	**1.0%**
Kingborough	29,379	29,619	30,168	30,720	31,210	31,649	32,159	32,787	**1.6%**
Sorell	11,004	11,130	11,300	11,523	11,819	12,157	12,451	12,795	**2.2%**
Southern Midlands	5,730	5,758	5,791	5,834	5,827	5,839	5,863	5,934	**0.5%**
Tasman	2,259	2,260	2,222	2,258	2,270	2,316	2,299	2,317	**0.4%**
Metro Hobart*	**203,714**	**204,375**	**206,461**	**208,762**	**210,211**	**212,317**	**214,205**	**216,250**	**0.9%**
Southern Region	**231,854**	**232,603**	**234,872**	**237,526**	**239,324**	**241,612**	**243,739**	**246,162**	**0.9%**

Source: ABS Estimated Residential Population 2009

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

Figure 3. Population Growth by LGA, 2001- 2008



Source: ABS Estimated Residential Population 2009

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3.1.2 Population Projections

From an economic and strategic planning perspective, it is important to consider forecasts for population growth.

Table 2 below illustrates the five year growth trend leading up to 2007, using ABS Estimated Resident Population figures. Population forecasts are then provided in five year intervals based on estimates undertaken by the Tasmanian Demographic Change Advisory Council. From Table 2 below we see that population growth rate is expected to decrease over time for most areas. High growth areas such as Brighton and Sorell are expected to maintain the highest growth rates although this rate is expected to decline over each five year period. Hobart is expected to undergo stable growth whilst Kingborough is not expected to maintain the high growth shown over the 2012- 2017 period.

Table 2. Five Yearly Population Growth Trends and Forecasts, 2002- 2032

	2002-2007 Change		2007-2012 Change		2012-2017 Change		2017-2022 Change		2022-2027 Change		2027-2032 Change	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Brighton	1,449	11.2%	1,852	12.5%	1,898	11.4%	1,968	10.6%	2,018	9.8%	2,041	9.0%
Central Highlands	2	0.1%	68	2.9%	44	1.8%	18	0.7%	-7	-0.3%	-53	-2.2%
Clarence	1,202	2.4%	1,241	2.4%	1,011	1.9%	857	1.6%	698	1.3%	572	1.0%
Derwent Valley	311	3.3%	388	4.0%	335	3.3%	311	3.0%	256	2.4%	176	1.6%
Glamorgan Spring Bay	364	9.1%	326	7.4%	258	5.5%	211	4.2%	150	2.9%	92	1.7%
Glenorchy	235	0.5%	233	0.5%	39	0.1%	-66	-0.1%	-172	-0.4%	-286	-0.6%
Hobart	1,983	4.2%	1,747	3.5%	1,792	3.5%	1,832	3.4%	1,766	3.2%	1,675	3.0%
Huon Valley	623	4.5%	563	3.8%	470	3.1%	399	2.5%	275	1.7%	122	0.7%
Kingborough	2,270	7.7%	1,307	4.1%	2,906	8.7%	1,977	5.4%	1,870	4.9%	1,757	4.4%
Sorell	1,153	10.5%	1,093	8.8%	1,053	7.8%	1,032	7.1%	984	6.3%	879	5.3%
Southern Midlands	109	1.9%	-15	-0.3%	-87	-1.5%	-132	-2.3%	-30	-0.5%	-121	-2.2%
Tasman	57	2.5%	100	4.3%	7	0.3%	27	1.1%	32	1.3%	61	2.5%
Metro Hobart*	**8,603**	**4.2%**	**7,861**	**3.7%**	**9,034**	**4.1%**	**7,911**	**3.4%**	**7,420**	**3.1%**	**6,814**	**2.8%**
Southern Region	**9,758**	**4.2%**	**8,903**	**3.7%**	**9,726**	**3.8%**	**8,434**	**3.2%**	**7,840**	**2.9%**	**6,915**	**2.5%**

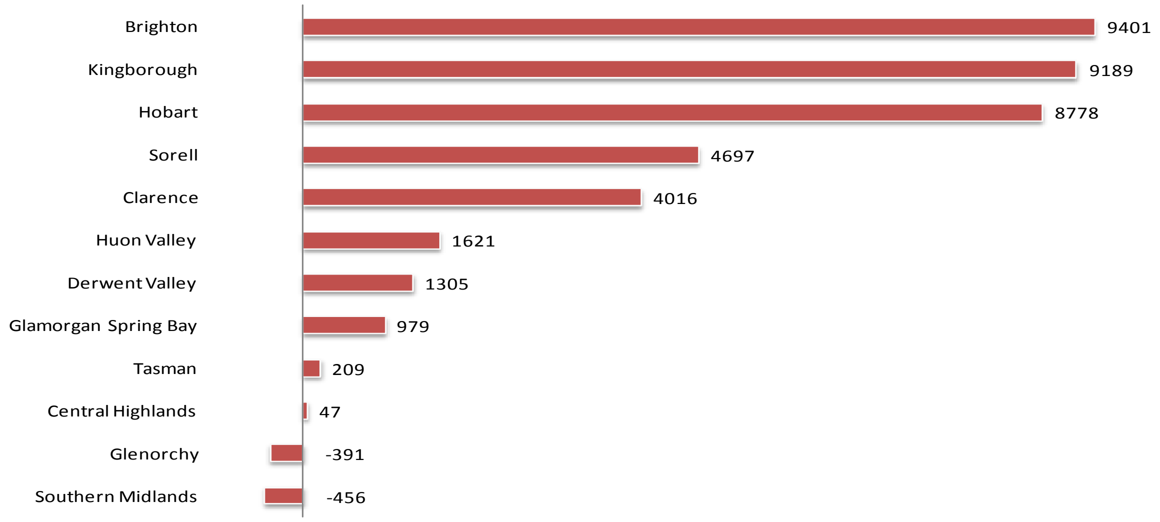
Source: ABS Estimated Residential Population 2009, and Tasmanian Demographic Change Advisory Council

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

From 2012, the Metro Hobart region is expected to grow at a higher rate than the Southern Region as LGAs such as Southern Midlands, Central Highlands and Glenorchy start to decline. Both regions are subject to diminishing returns of population growth with the five yearly change over 2002-2007 dropping from 4.2% in both regions to 2.8% and 2.5% for Metro Hobart and Southern Regions over the 2027- 2032 period.

Population forecasts suggest areas such as Brighton, Kingsborough and Hobart are to experience the greatest nominal population rise (see Figure 4). In particular, Brighton's population is anticipated to increase by over 9,400 residents or 62% between 2007 and 2032. Also expecting a large percentage increase is Sorell with forecasts indicating a 37% rise from current levels. Only the LGAs of Southern Midlands and Central Highlands are expected to have a decreasing residential population. Population projections for the Metro Hobart region indicate a growth of slightly fewer than 37,000 residents or just over 17%. Similarly for the Southern Region, a resident population some 16% or 39,400 larger is anticipated come 2032. Change in population over time is shown graphically in the following Figures.

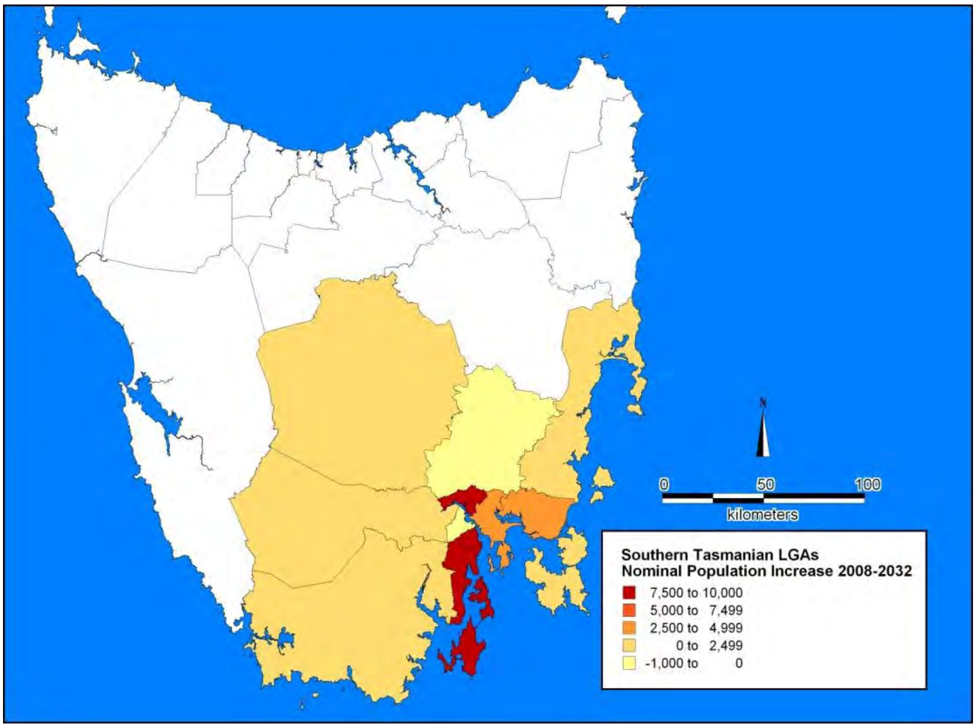
Figure 4. Population Growth Forecasts by LGA 2008- 2032



Source: Tasmanian Demographic Change Advisory Council

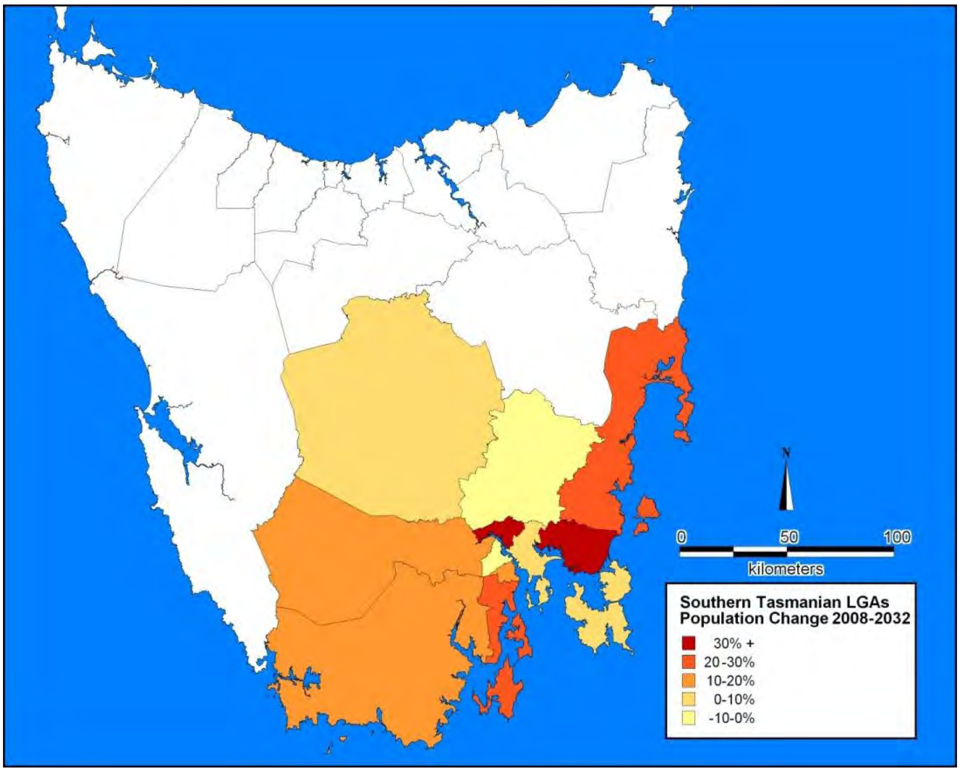
It should be noted that all population forecasts are subject to significant uncertainties. Population growth in a particular location can be strongly influenced by availability and cost of residential development opportunities and planning constraints affecting this, by new or declining employment opportunities, and by the relative attractiveness of locations associated with lifestyle, physical setting and social status. The biggest uncertainties arise from migration both locally and to and from the region, not from births and deaths.

Figure 5. Nominal Population Increase by LGA, 2008-2032



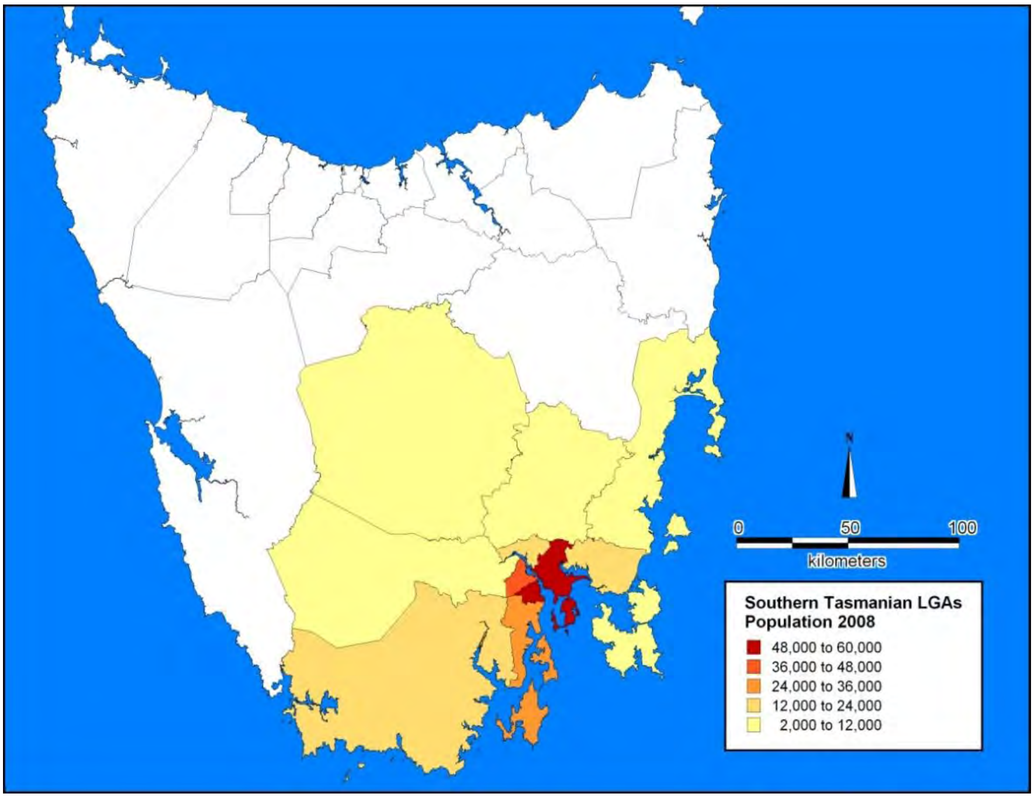
Source: Tasmanian Demographic Change Advisory Council

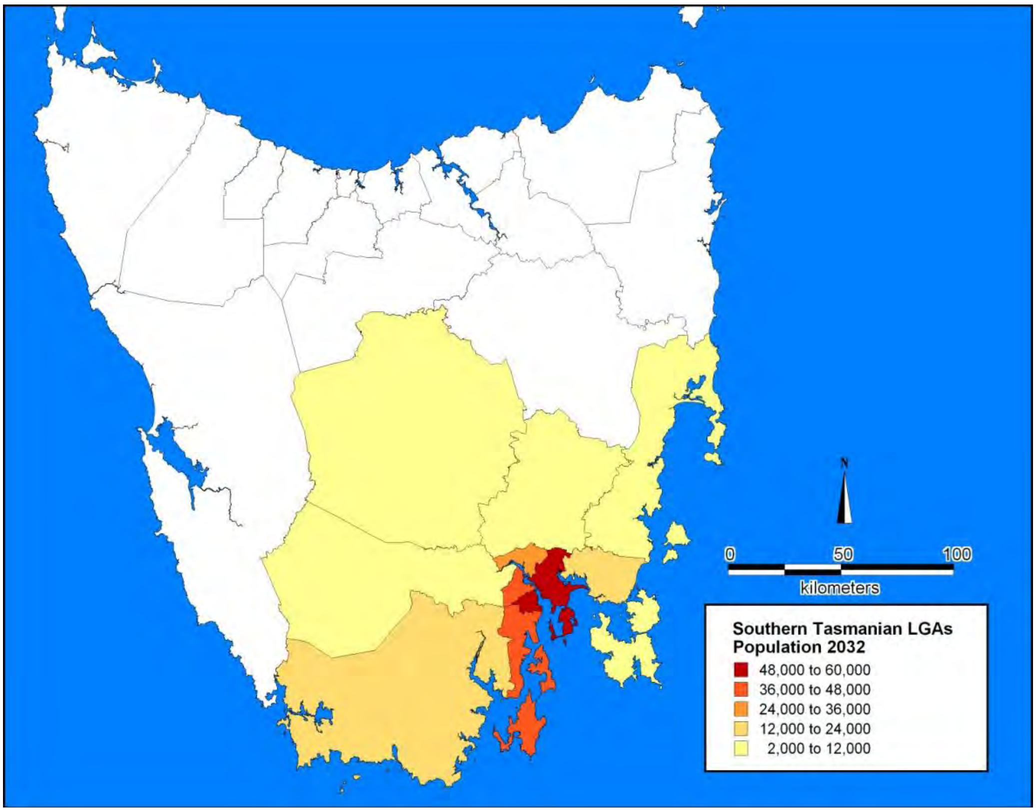
Figure 6. Percentage Population Increase by LGA, 2008-2032



Source: Tasmanian Demographic Change Advisory Council

Figure 7. Population by LGA, 2008 and 2032





Source: Tasmanian Demographic Change Advisory Council

Generally population of the Southern Tasmania region is concentrated around Hobart and the more accessible inner Council areas of, Glenorchy, Clarence, and Kingborough. The next most populous Council areas near Hobart are Brighton, Derwent Valley, Huon Valley and Sorell. Derwent Valley, Huon Valley and (to a lesser extent) Sorell have large areas including significant conservation areas, and the concentration of population is towards Hobart. Areas experiencing the highest growth are also generally closer to Hobart, including Hobart, Brighton, Kingborough and Clarence. An exception is Glenorchy where there has been little current growth and growth is expected to slow and then decline over the forecast period for a net decrease. Sorell is an area experiencing significant growth somewhat removed from the Hobart, however this growth rate is forecast to reduce over time.

3.1.3 Age Profile

Since 1996, the median age of Southern Region residents has been increasing. In the ten years ending 2006, all LGAs showed an increase in the median age of the residential population. The average median age across all LGAs was 34.1 years in 1996, rising to 39.6 years in 2006 (see Table 3).

Table 3. Median Ages by LGA, 1996-2006

	1996	2001	2006	10yr Change
Brighton	26	29	31	**5**
Central Highlands	35	39	43	**8**
Clarence	35	38	39	**4**
Derwent Valley	33	36	38	**5**
Glamorgan Spring Bay	39	43	47	**8**
Glenorchy	35	37	38	**3**
Hobart	34	36	37	**3**
Huon Valley	34	36	39	**5**
Kingborough	34	37	38	**4**
Sorell	32	36	39	**7**
Southern Midlands	35	36	39	**4**
Tasman	37	41	47	**10**
Average	**34.1**	**37**	**39.6**	**5.5**

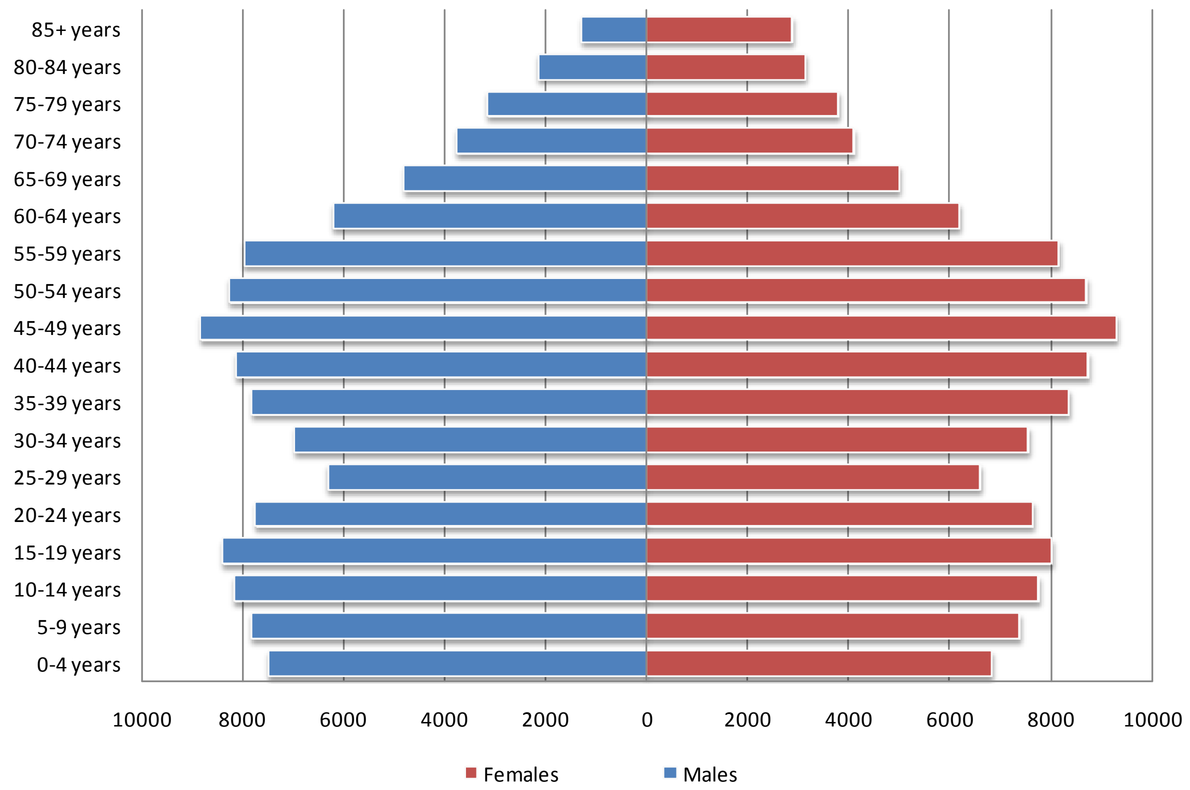
Source: ABS Census Population and Housing 2006.

Local Government Areas located on the periphery of the Southern Region have higher median ages in comparison to areas surrounding the capital city. In 2006, Glamorgan, Tasman and Central Highlands all reported a median age over 40 years with Tasman and Central Highlands experiencing a 10 and 8 year increase from 1996 median ages. This is the legacy of the failure of many of these areas to hold their young adult population in the past, albeit there is some attraction to retirement age people to move to areas such as the east coast. In contrast, the median age in Brighton is well below that of other regions with a median of 31 years in 2006, driven largely by the high concentration of public housing and the client groups catered for.

In general the areas closer to Hobart have a lower median age. This reflects the propensity of working age population to locate near the employment centres of Metropolitan Hobart, and families to locate in these areas close to schools and higher education, and students at the university drawn from outside the region.

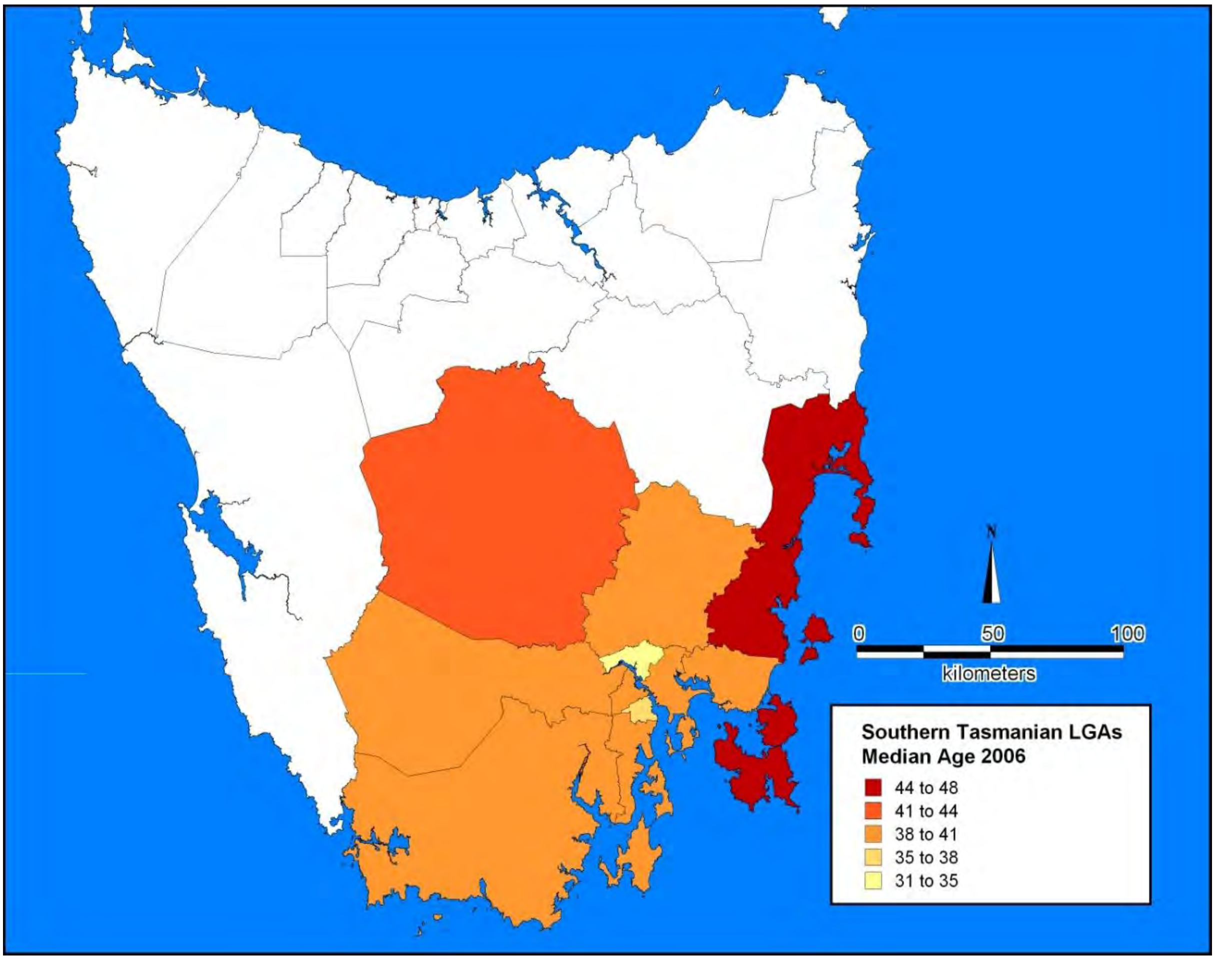
These findings are reflected in the age and sex pyramid for the Southern Region (Figure 8). As shown below, the pyramid forms a 'block' shape unlike the 'bell' formation typical of large communities. The youth community, aged between 0-14 years accounts for around 19% of the total population. Those of a working age between 15-64 years represent 66% of the population whilst mature age persons 65 years and over account for 15% of the Southern Region community. The 'gap' in young adults arises from the departure of many to mainland centres for employment and education opportunities – and to get a taste of the wider world.

Figure 8. Age and Sex Pyramid, Southern Region, 2006



Source: ABS Census Population and Housing 2006.

Figure 9. Median Age, 2006



Source: ABS Census Population and Housing 2006.

3.1.4 Household Size

Household sizes in Tasmania's Southern Region are fairly consistent with no individual LGAs significantly different from the regional trend. The region has a relatively high proportion of smaller households with over 52% or 55,867 homes occupied by no more than two persons (seeTable 4). These findings did not differ between the Southern Region and Metro Hobart areas.

Table 4. Household Size- Number of Persons Usually Resident, 2006

	Number of persons usually resident						
	1	2	3	4	5	6 or more	Total
Brighton	806	1,548	916	858	364	189	4,681
Central Highlands	263	351	107	96	46	27	890
Clarence	4,627	6,626	2,999	2,801	1,039	452	18,544
Derwent Valley	795	1,217	564	532	217	108	3,433
Glamorgan Spring Bay	487	764	174	160	76	27	1,688
Glenorchy	5,568	5,864	2,636	2,156	851	401	17,476
Hobart	6,207	6,475	2,723	2,429	849	286	18,969
Huon Valley	1,170	1,943	735	722	345	200	5,115
Kingborough	2,432	4,017	1,784	1,971	742	303	11,249
Sorell	1,179	1,671	711	676	234	116	4,587
Southern Midlands	458	728	322	328	139	67	2,042
Tasman	278	393	124	90	28	14	927
Metro Hobart*	**21,614**	**27,418**	**12,333**	**11,423**	**4,296**	**1,855**	**78,939**
Southern Region	**24,270**	**31,597**	**13,795**	**12,819**	**4,930**	**2,190**	**89,601**
% Total	**27.1%**	**35.3%**	**15.4%**	**14.3%**	**5.5%**	**2.4%**	**100.0%**

Source: ABS Census Population and Housing 2006.

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

The greatest concentration of smaller households of 1-2 residents, is found in Hobart and Glenorchy (see Table 5). In particular, Hobart has over 74% of all households with no more than two residents. Clarence has a greater number of medium sized households and large households in the study area. In 2006, there were 5,800 medium sized households of 3-4 residents accounting for 31% of total homes and a further 1,491 larger households in excess of five usual residents. Generally, smaller households represent 62% of all homes in the Southern Region with around 30% medium in size and 8% accommodating for larger number of residents.

Table 5. Small, Medium and Large Households by LGA, 2006

	1-2 persons		3-4 persons		5+ persons	
	Number	% Total	Number	% Total	Number	% Total
Brighton	2,354	50.3%	1,774	37.9%	553	11.8%
Central Highlands	614	69.0%	203	22.8%	73	8.2%
Clarence	11,253	60.7%	5,800	31.3%	1,491	8.0%
Derwent Valley	2,012	58.6%	1,096	31.9%	325	9.5%
Glamorgan Spring Bay	1,251	74.1%	334	19.8%	103	6.1%
Glenorchy	11,432	65.4%	4,792	27.4%	1,252	7.2%
Hobart	12,682	66.9%	5,152	27.2%	1,135	6.0%
Huon Valley	3,113	60.9%	1,457	28.5%	545	10.7%
Kingborough	6,449	57.3%	3,755	33.4%	1,045	9.3%
Sorell	2,850	62.1%	1,387	30.2%	350	7.6%
Southern Midlands	1,186	58.1%	650	31.8%	206	10.1%
Tasman	671	72.4%	214	23.1%	42	4.5%
Metro Hobart	**49,032**	**62.1%**	**23,756**	**30.1%**	**6,151**	**7.8%**
Southern Region	**55,867**	**62.4%**	**26,614**	**29.7%**	**7,120**	**7.9%**

Source: ABS Census Population and Housing 2006.

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

3.1.5 Household Income

Household income quintiles defined by the *Australian Bureau of Statistics* depict low to high income households by gross weekly income (based on national income distribution). Under this standard, those in the lowest quintile are households earning less than $499 gross weekly income. In contrast, high income households are those with a combined income exceeding $2,000 in weekly income.

Table 6 below shows the proportion of households by each income quintile with the Southern Region showing a relatively even spread of household wealth. The lowest quintile represents the highest proportion of households with around 25% of population falling under this cohort for both the Southern Region and Metro Hobart area. Generally, households in Metro Hobart have slightly higher incomes although both regions are similar in the distribution of wealth amongst the community.

Households located on the periphery of the Southern Region show lower levels of weekly income. The LGAs of Tasman, Centrals Highlands, Glamorgan Spring Bay and Derwent Valley all have in excess of 30% of households in the lowest income quintile. In contrast, those areas central to the Southern Region account for the greater share of high income households. As shown above, Hobart, Kingborough and Clarence are the only LGAs with over 10% of households in the highest income cohort.

Table 6. Weekly Household Income 2006

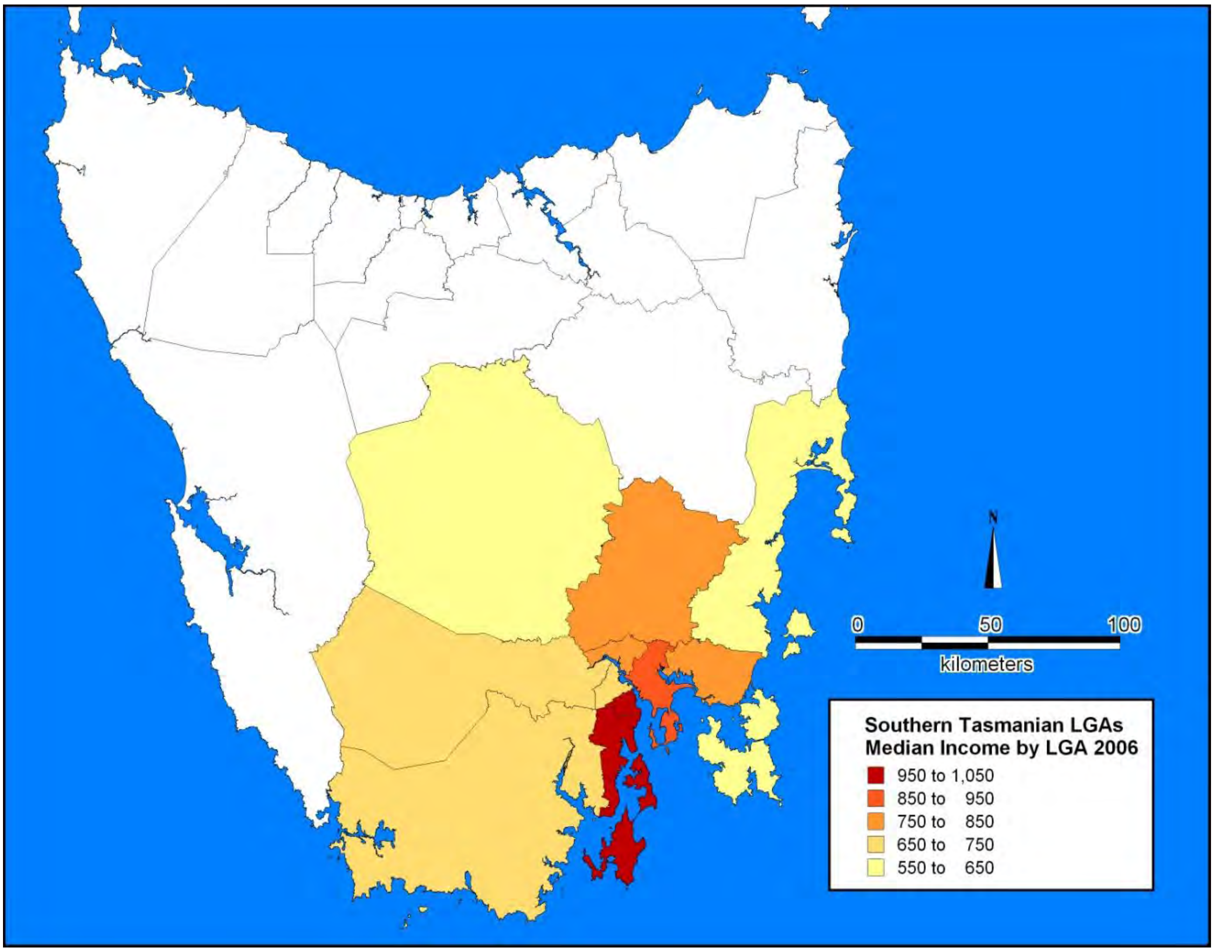
	Weekly Household Income Quintiles				
	< $499	$500- $799	$800- $1,199	$1,200- $1,999	$2,000 +
Brighton	26.5%	23.4%	22.9%	19.9%	7.2%
Central Highlands	35.9%	29.5%	20.3%	10.2%	4.1%
Clarence	21.9%	21.8%	21.0%	21.3%	13.9%
Derwent Valley	30.6%	22.9%	20.7%	18.6%	7.2%
Glamorgan Spring Bay	35.7%	24.7%	20.5%	14.0%	5.1%
Glenorchy	30.3%	24.3%	21.4%	17.3%	6.8%
Hobart	20.8%	18.7%	20.2%	19.8%	20.5%
Huon Valley	29.6%	25.8%	22.5%	15.5%	6.6%
Kingborough	19.4%	19.9%	21.3%	23.8%	15.6%
Sorell	27.1%	24.2%	22.7%	18.4%	7.6%
Southern Midlands	28.7%	23.6%	22.6%	17.8%	7.2%
Tasman	40.0%	28.8%	18.3%	9.4%	3.4%
Metro Hobart	**24.1%**	**21.6%**	**21.1%**	**20.0%**	**13.1%**
Southern Region	**25.0%**	**22.1%**	**21.2%**	**19.4%**	**12.3%**

Source: ABS Census Population and Housing 2009. NB: Excludes 'not stated' households.

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

Households located on the periphery of the Southern Region show lower levels of weekly income. The LGAs of Tasman, Centrals Highlands, Glamorgan Spring Bay and Derwent Valley all have in excess of 30% of households in the lowest income quintile. In contrast, those areas central to the Southern Region account for the greater share of high income households. As shown above, Hobart, Kingborough and Clarence are the only LGAs with over 10% of households in the highest income cohort.

Figure 10. Median Income, 2006



Source: ABS Census Population and Housing 2006.

3.1.6 Labour Force and Employment

The 2006 labour force participation rate was around 61% for the Southern Region which is consistent with national average of 60.7%. The unemployment rate during the same time was approximately 6%, less than the Tasmanian average of 6.6% but greater than the national average of 5.2%. Between Metro Hobart and the greater Southern region there are no significant discrepancies in labour force data although Metro Hobart showed slightly lower unemployment and greater labour force participation (Table 7). This reflects the concentration of jobs provided in Metro Hobart.

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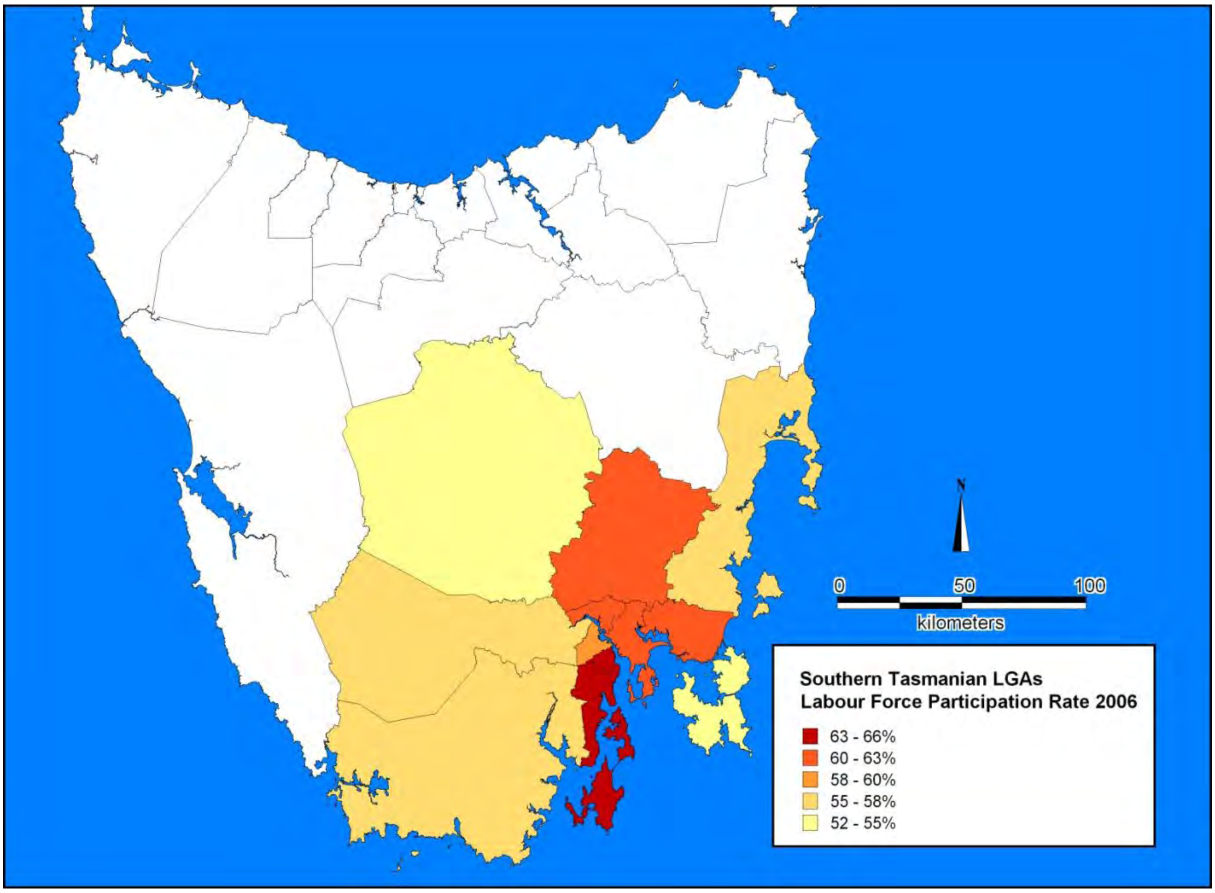
Table 7. Labour Force Statistics, 2006

	Unemployed	Unemployment Rate	Labour Force	Participation Rate
Brighton	505	8.8%	5,711	60.2%
Central Highlands	60	6.6%	913	53.3%
Clarence	1,217	5.2%	23,462	61.3%
Derwent Valley	355	9.0%	3,951	56.3%
Glamorgan/Spring Bay	96	5.3%	1,813	55.1%
Glenorchy	1,302	6.8%	19,235	58.6%
Hobart	1,386	5.5%	25,161	65.8%
Huon Valley	433	7.3%	5,912	57.0%
Kingborough	679	4.5%	15,121	64.3%
Sorell	370	6.6%	5,570	61.7%
Southern Midlands	162	6.4%	2,535	60.7%
Tasman	92	10.1%	907	51.7%
Metro Hobart	**5,814**	**5.9%**	**98,211**	**62.0%**
Southern Region	**6,657**	**6.0%**	**110,291**	**61.4%**

Source: ABS Census Population and Housing 2006.

Unemployment in the larger LGAs of Hobart, Clarence and Kingborough were all below the regional average with Glenorchy the only major LGA with above average unemployment. Participation rates were also higher in the more populous Councils although Glenorchy was again the only exception with a participation rate below 60%.

Figure 11. Labour Force Participation Rate, 2006



Source: ABS Census Population and Housing 2006.

3.2 Summary by Local Government Area

Table 8 and Table 9 summarise the key economic and social characteristics of the seven outer areas and five inner area Southern Tasmanian LGAs respectively. The LGAs have been divided in this fashion to compare the observable trend differences between LGAs that are closer to the major activity centre of Hobart (inner area) and those that are relatively more remote (outer area). A comparative measure of low, medium or high is provided for each statistic in order to guide this comparison.

The summary indicates that there are significant differences between the inner and outer LGAs (see Table 10). Outer areas predominantly have a lower population and median income (wealth), lower forecasts of population growth, and an older population. They are also characterised by a relatively lower participation rate, and higher unemployment rate, potentially as a result of reduced employment opportunities and access. Conversely, inner areas have a higher population, population growth forecast, median income and participation rate. Residents are generally younger and rates of unemployment relatively lower.

The trend differences between inner and outer areas are reflective of the influence of proximity to higher order activity centres. Activity centres are hubs for employment, driving higher wealth and lower unemployment outcomes, while attracting new residents through the convenience of employment and retail access. Furthermore, the population attracted to the inner areas is often of a working age, driving down the average age of the inner areas.

Table 8. Outer Area, Economic and Social Characteristic Summary

	Pop. Base	Forecast Population Growth*	Age	Wealth	Participation Rate	Unemployment
Central Highlands	2,339 (Low)	47 (Low)	43 (High)	$614 (Low)	53.3% (Low)	6.6% (Med)
Derwent Valley	9,920 (Low)	1,305 (Low)	38 (Med)	$728 (Med)	56.3% (Low)	9.0% (High)
Glamorgan – Spring Bay	4,464 (Low)	979 (Low)	47 (High)	$632 (Low)	55.1% (Low)	5.3% (Med)
Huon Valley	14,858 (Med)	1,621 (Low)	39 (Med)	$707 (Med)	57.0% (Low)	7.3% (High)
Sorell	12,795 (Med)	4,697 (Med)	39 (Med)	$778 (Med)	61.7% (Med)	6.6% (Med)
Southern Midlands	5,934 (Low)	-456 (Negative)	39 (Med)	$757 (Med)	60.7% (Med)	6.4% (Med)
Tasman	2,317 (Low)	209 (Low)	47 (High)	$581 (Low)	51.7% (Low)	10.1% (High)
Outer Area	**52,627**	**8,402**	**41.7**	**$685.3**	**57%**	**7.33%**

*Growth from 2008 to 2032

Table 9. Inner Area, Economic and Social Characteristic Summary

	Pop. Base	Population Growth	Age	Wealth	Participation Rate	Unemployment
Brighton	15,198 (Med)	9,401 (High)	31 (Low)	$804 (Med)	60.2% (Med)	8.8% (High)
Clarence	51,506 (High)	4,016 (Med)	39 (Med)	$946 (Med)	61.3% (Med)	5.2% (Med)
Glenorchy	44,433 (Med)	-391 (Negative)	38 (Med)	$726 (Med)	58.6% (Low)	6.8% (Med)
Hobart	49,611 (High)	8,778 (High)	37 (Med)	$1,035 (High)	57.0% (High)	5.5% (Med)
Kingborough	32,787 (Med)	9,189 (High)	38 (Med)	$1,033 (High)	64.3% (High)	4.5% (Low)
Inner Area	**193,535**	**30,993**	**36.6**	**$908.8**	**62%**	**6.16%**

Table 10. Outer and Inner Area Characteristic Summary, Averages

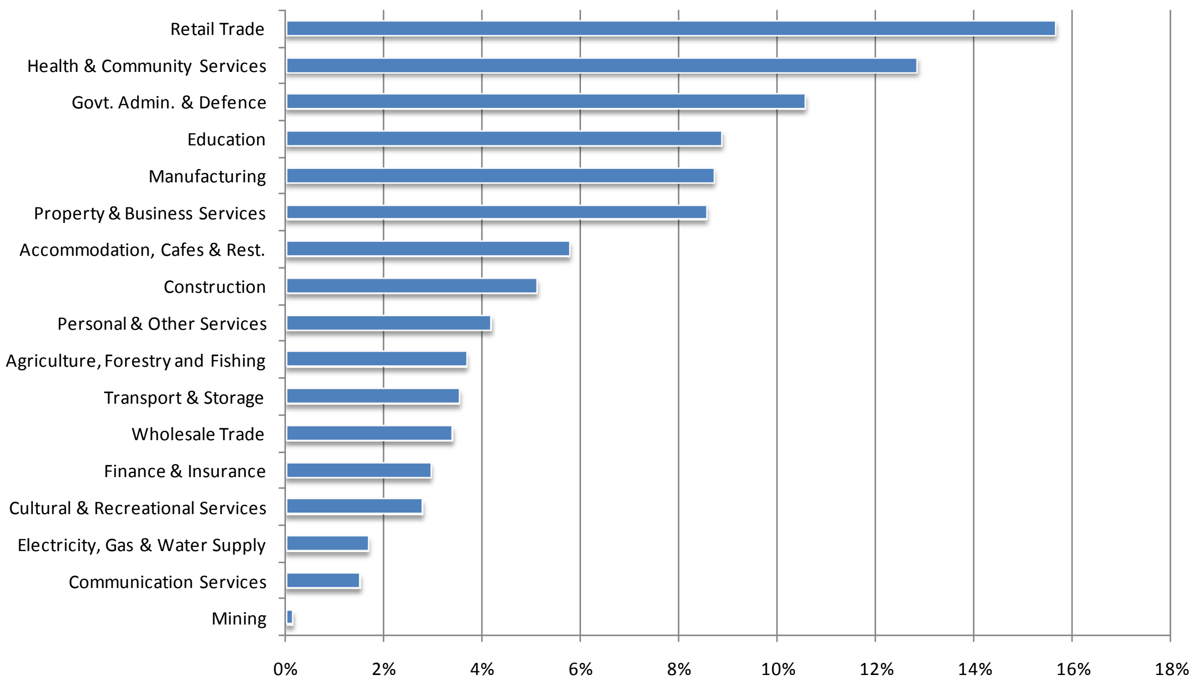
	Pop. Base	Population Growth	Age	Wealth	Participation Rate	Unemployment
Outer Area	52,627	8,402	41.7	$685.3	57%	7.33%
Inner Area	193,535	30,993	36.6	$908.8	62%	6.16%

3.3 Jobs and Industry

3.3.1 Journey to Work Analysis

ABS *Journey to Work* (JTW) data shows the destination of employment or place of work to give the number of jobs located within each Statistical Local Area (SLA). Corresponding SLA geographical boundaries within that of LGAs will quantify the number of existing jobs within these Councils. As of 2006, there were a total of 93,736 full-time jobs in the Southern Region with retail and health and community services the dominant industry employers accounting for 16% and 13% of total employment respectively (Figure 12).

Figure 12. Southern Region Jobs by Industry, 2006

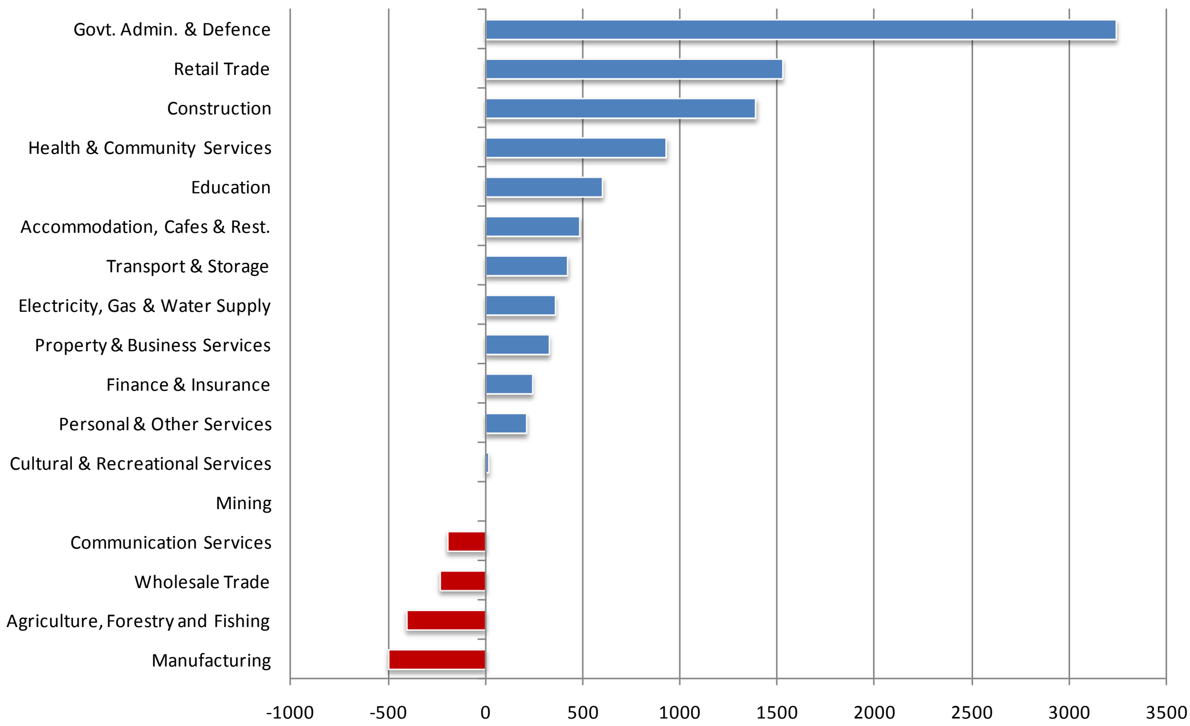


Source: ABS Journey to Work 2006

Recent job growth in the region has been most prominent in government, administration and defence; retail; and construction industries. Over 2001 to 2006, there were an additional 3,242 government, administration and defence jobs and a further 1,526 retail and 1,390 construction workers. Employment sectors such as manufacturing; agriculture, forestry and fishing; wholesale trade; and communication services all experienced a decline in employment over the same period.

The greatest decline was seen in manufacturing with 499 jobs lost over the five years ending 2006 (see Figure 13).

Figure 13. Job Growth by Industry, Southern Region, 2001- 2006

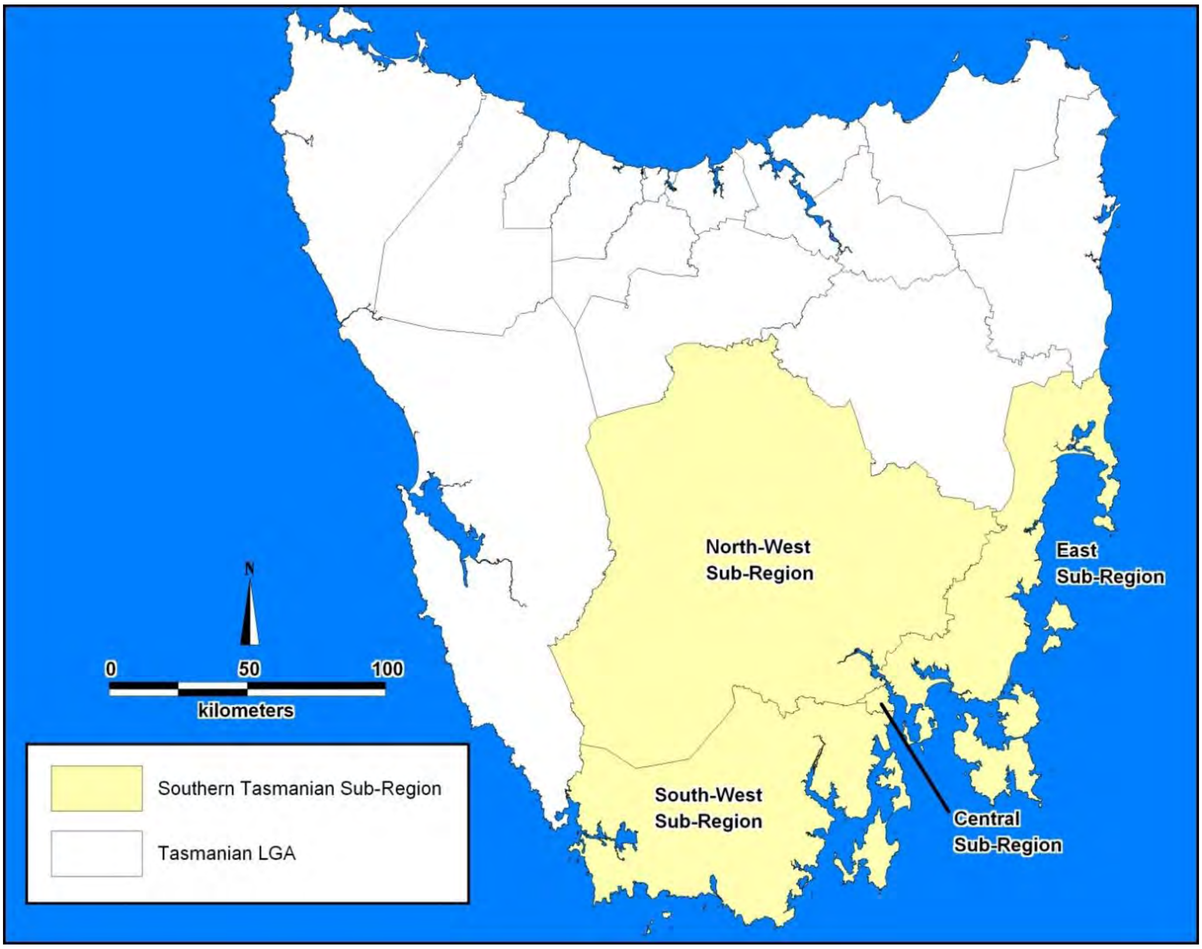


Source: ABS Journey to Work 2001 & 2006

The LGAs of the Southern Region can be grouped based on the connectivity between the statistical divisions and geographical distribution. Here, the Southern Region has been divided into the four sub-regions of East, North West, South West, and Central regions (see Figure 14). This is followed by a full breakdown of Journey to Work movements by LGA, and also a Metropolitan vs. non-Metropolitan split.

Table 11 illustrates the number of jobs located within the boundaries of each sub-region and is it shown that the Central area accounts for the greatest share of employment with around 48% of all Southern Region jobs. In contrast, the South West is the least popular work destination, with approximately 11% of total jobs located in the area.

Figure 14. Southern Region Sub-Regions



Source: ABS Census Population and Housing 2006.

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Table 11. Jobs by Industry, Southern Region and Sub-regions, 2006

	East		North West		South West		Central		Total Number of Jobs
	Jobs	% Total	Jobs	% Total	Jobs	% Total	Jobs	% Total	
Agriculture, Forestry and Fishing	903	26.5%	986	28.9%	1,204	35.3%	320	9.4%	3,413
Mining	26	20.5%	33	26.0%	25	19.7%	43	33.9%	127
Manufacturing	1,153	14.3%	4,450	55.1%	932	11.5%	1,547	19.1%	8,082
Electricity, Gas & Water	44	2.8%	564	36.2%	25	1.6%	925	59.4%	1,558
Construction	1,083	22.8%	1,780	37.5%	749	15.8%	1,129	23.8%	4,741
Wholesale Trade	467	14.8%	1,228	39.0%	329	10.4%	1,126	35.7%	3,150
Retail Trade	3,084	21.2%	3,869	26.6%	2,015	13.9%	5,565	38.3%	14,533
Accommodation, Cafes & Rest.	1,076	20.1%	719	13.4%	496	9.3%	3,063	57.2%	5,354
Transport & Storage	589	18.0%	1,645	50.2%	260	7.9%	786	24.0%	3,280
Communication Services	235	16.7%	307	21.8%	287	20.4%	577	41.0%	1,406
Finance & Insurance	251	9.2%	226	8.2%	114	4.2%	2,150	78.4%	2,741
Property & Business Services	1,022	12.9%	1,257	15.8%	617	7.8%	5,050	63.6%	7,946
Govt. Admin. & Defence	910	9.3%	968	9.9%	633	6.5%	7,295	74.4%	9,806
Education	1,548	18.8%	1,722	20.9%	1,008	12.2%	3,956	48.0%	8,234
Health & Community Services	1,590	13.3%	2,021	17.0%	1,077	9.0%	7,234	60.7%	11,922
Cultural & Recreational Ser.	492	19.0%	435	16.8%	181	7.0%	1,477	57.1%	2,585
Personal & Other Services	914	23.6%	598	15.4%	265	6.8%	2,104	54.2%	3,881
Non-Classifiable	193	21.2%	234	25.7%	145	16.0%	337	37.1%	909
Not stated	17	25.0%	20	29.4%	7	10.3%	24	35.3%	68
Total	**15,597**	**16.6%**	**23,062**	**24.6%**	**10,369**	**11.1%**	**44,708**	**47.7%**	**93,736**

Source: ABS Journey to Work 2006

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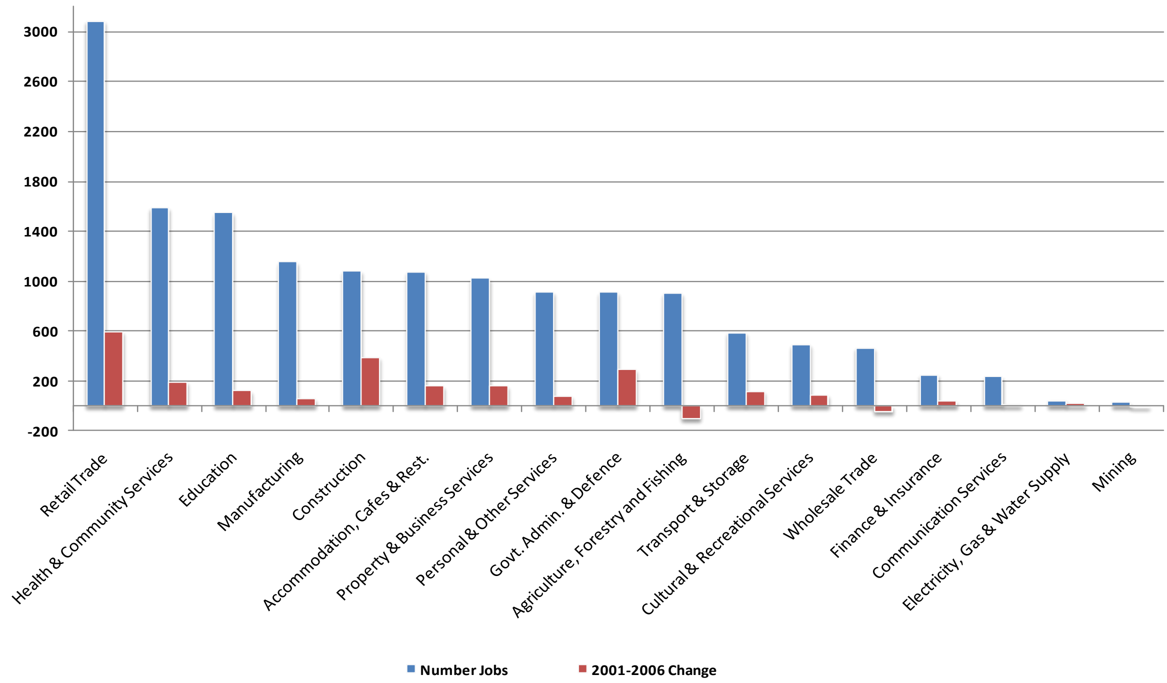
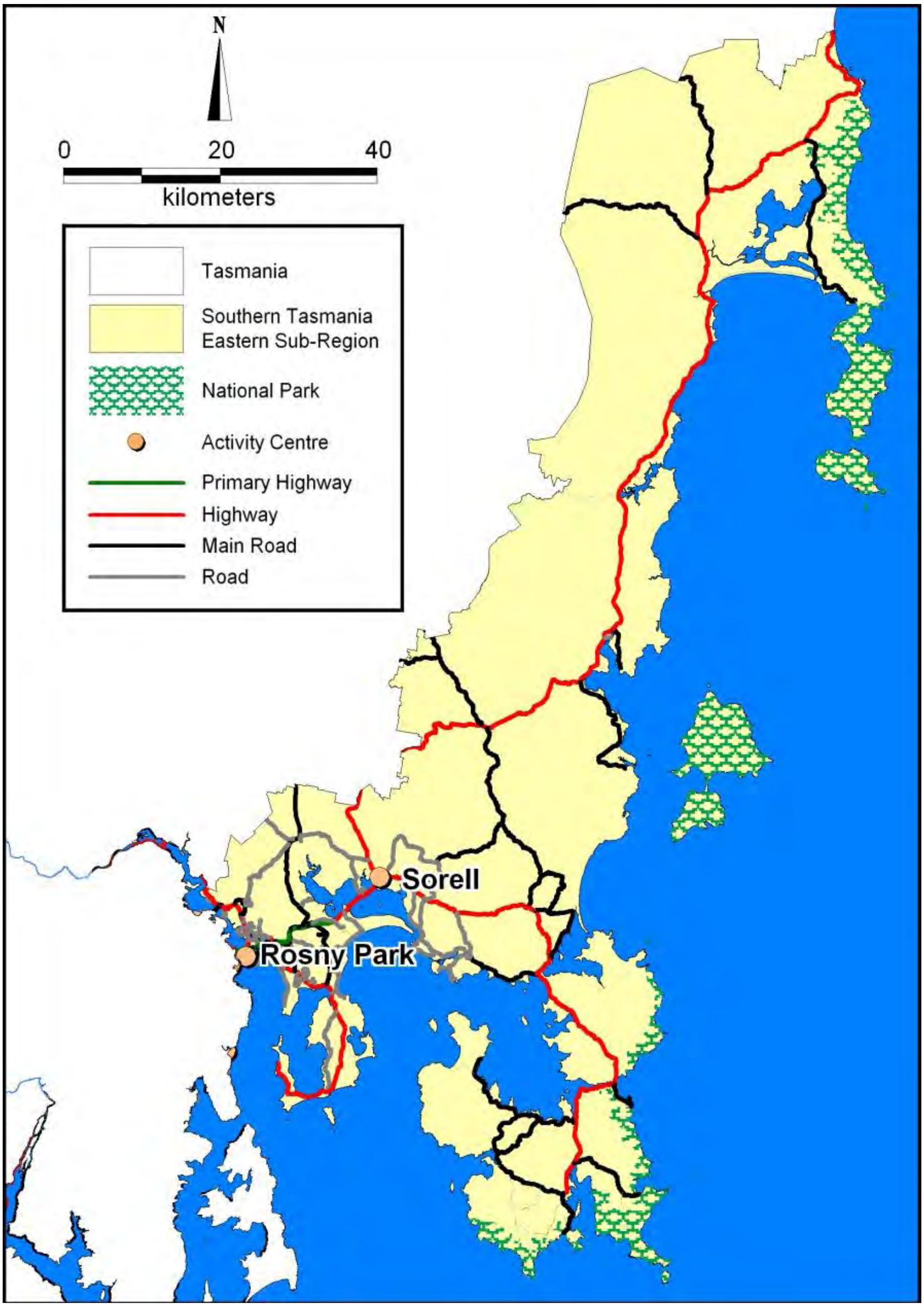
The *East* area incorporates the LGAs of Glamorgan-Spring Bay; Clarence; Sorell; and Tasman. Employing over 3,000 workers, the 'retail' sector is the greatest employer in the East sub-division and also experienced the greatest job growth since 2001 with slightly fewer than 600 additional positions (Figure 15). 'Health and community services' and 'education' generate employment for around 1,590 and 1,548 workers respectively. The 'construction' industry appears to be an emerging sector with a further 390 placements since 2001

Figure 15. JTW Employment 2006 and 2001- 2006 Change, East



Source: ABS Journey to Work 2001 & 2006

Figure 16. Eastern Sub-Region



Source: ABS Census Population and Housing 2006.

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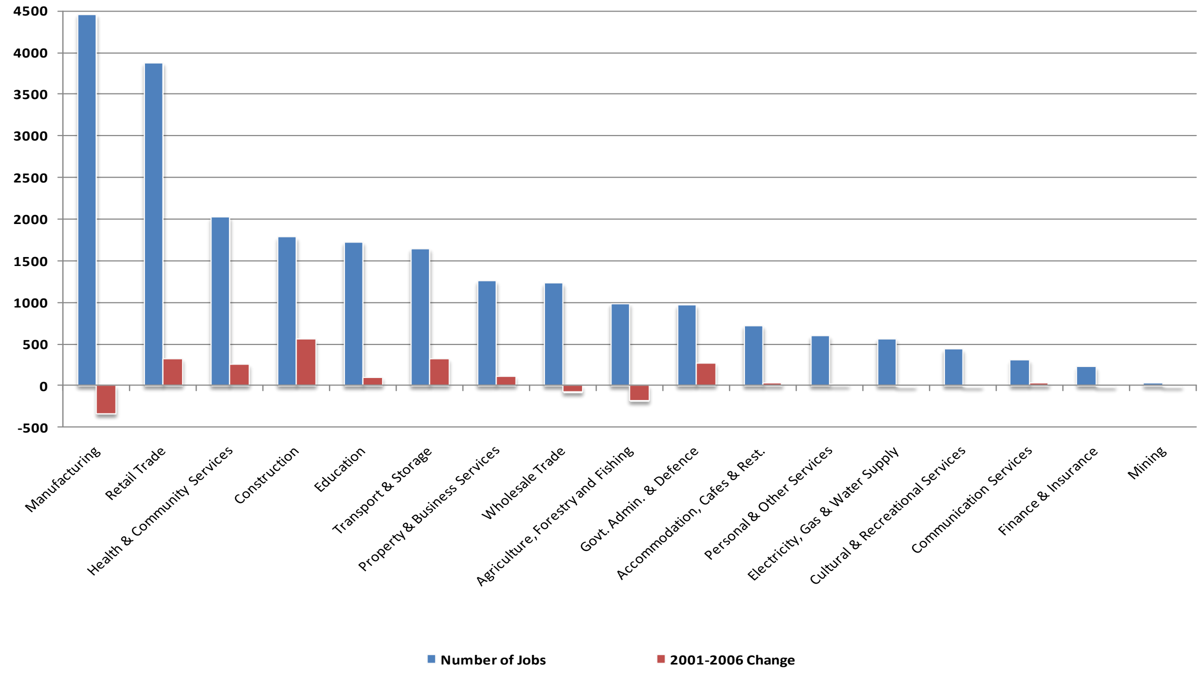
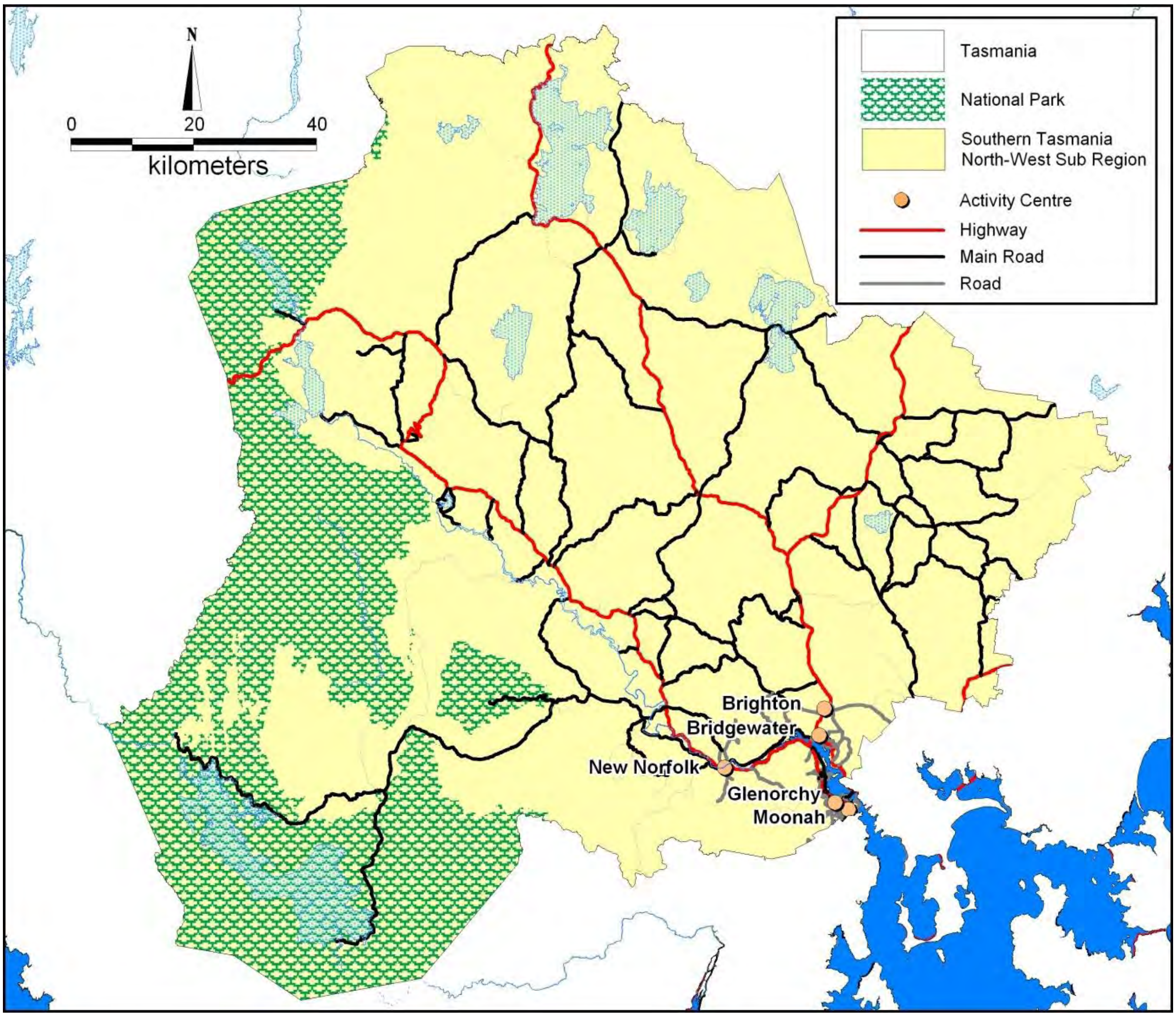
The *North West,* encompassing Southern Midland; Brighton; Central Highlands; Derwent; and Glenorchy is dominated by 'manufacturing' and 'retail' employment (see Figure 17). As of 2006, there were 4,450 'manufacturing' jobs located in the South West although this number declined 338 since 2001. In contrast, the number of 'retail' workers employed in the region grew 320 to 3,869 by 2006. Similarly, to the East sub-region, 'construction' accounts for a large proportion of job growth with an additional 554 jobs over the five year period.

Figure 17. JTW Employment 2006 and 2001- 2006 Change, North West



Source: ABS Journey to Work 2001 & 2006

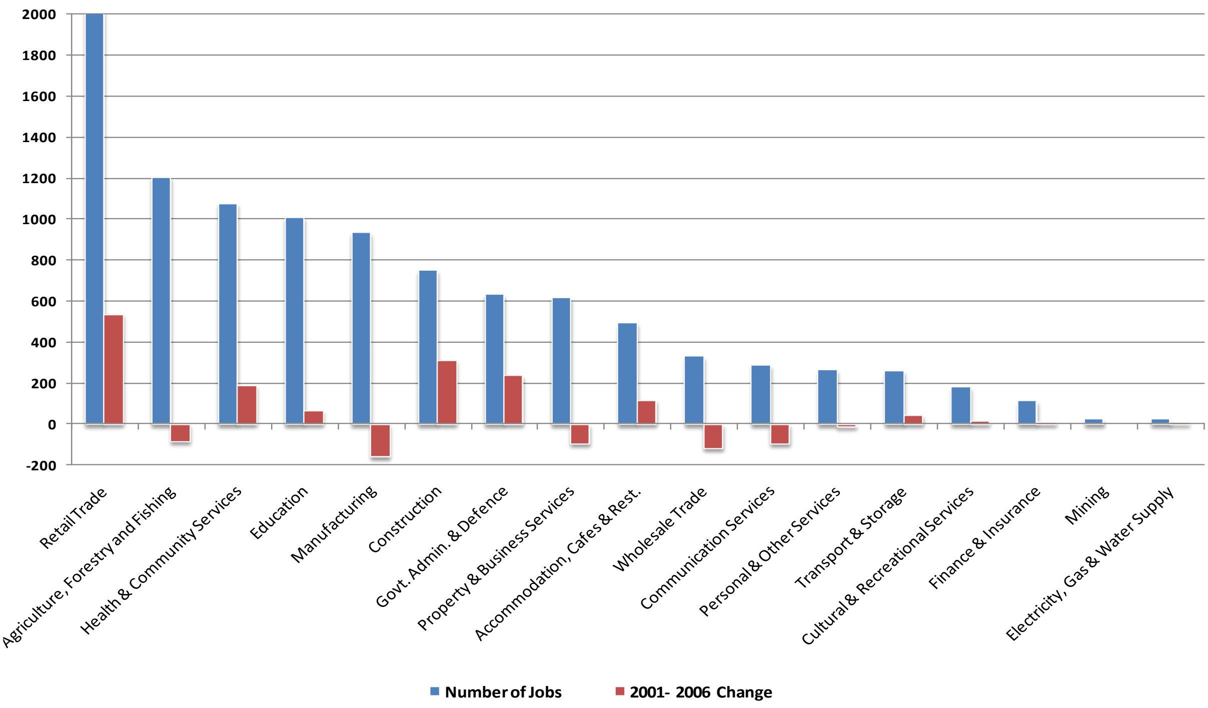
Figure 18. North West Sub-Region



Source: ABS Census Population and Housing 2006.

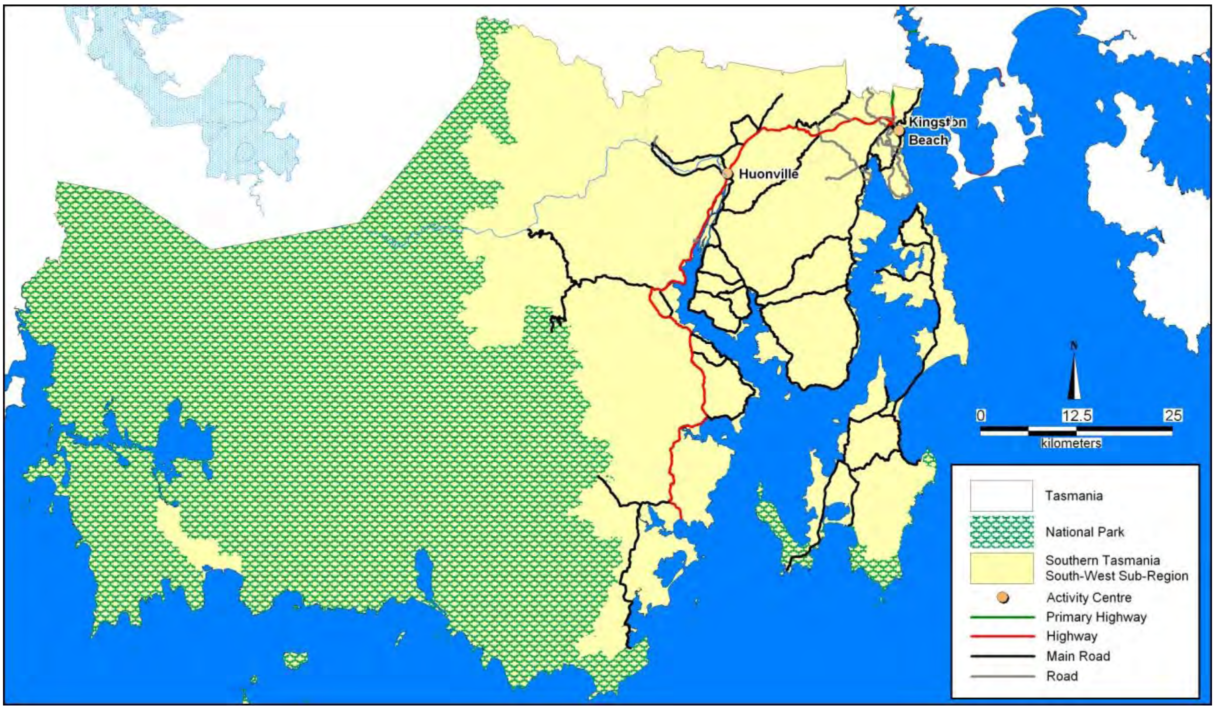
The South West sub-region of Huon Valley and Kingborough also contains a growing 'retail' industry with a further 537 jobs in 2006, increasing retail employment to 2,015 (Figure 19). Other prominent industries consist of 'agriculture, forestry and fishing' and 'health and community services' with a total of 1,204 and 1,077 jobs located within the two LGAs. Following trends of both the East and North West sub-regions, the 'construction' sector has also experienced strong job growth with 313 extra jobs in the South West area.

Figure 19. JTW Employment 2006 and 2001- 2006 Change, South West



Source: ABS Journey to Work 2001 & 2006

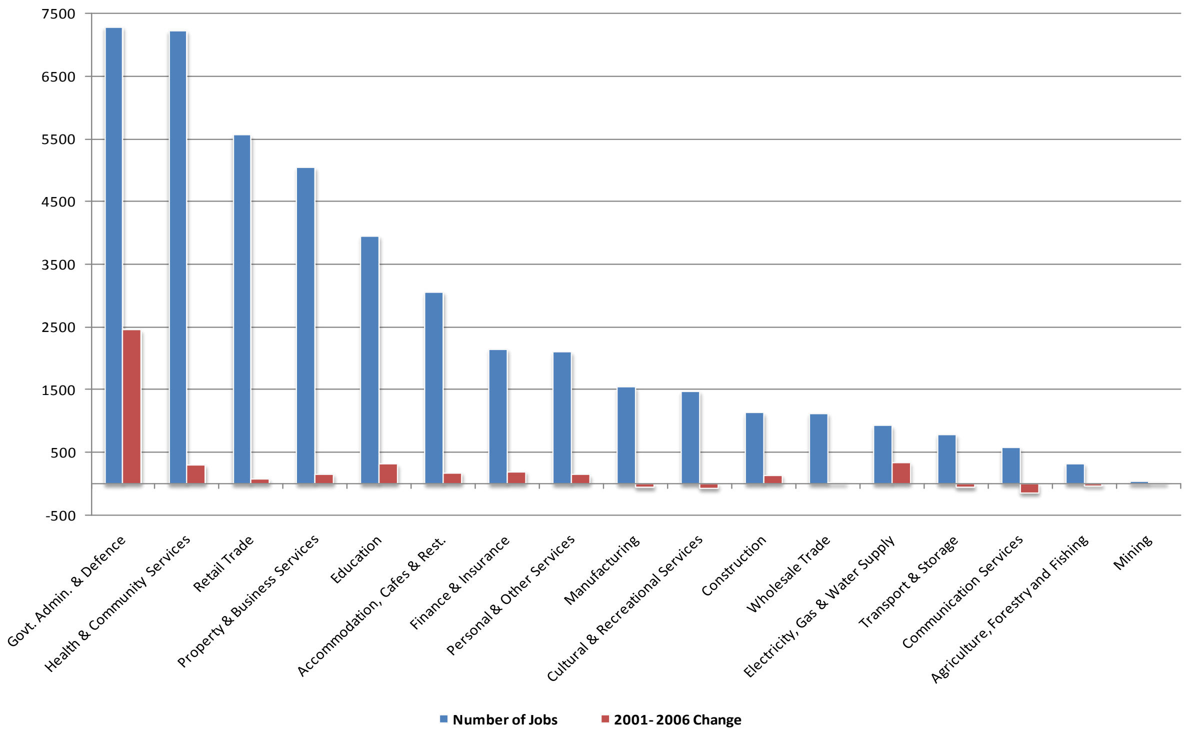
Figure 20. South West Sub-Region



Source: ABS Census Population and Housing 2006.

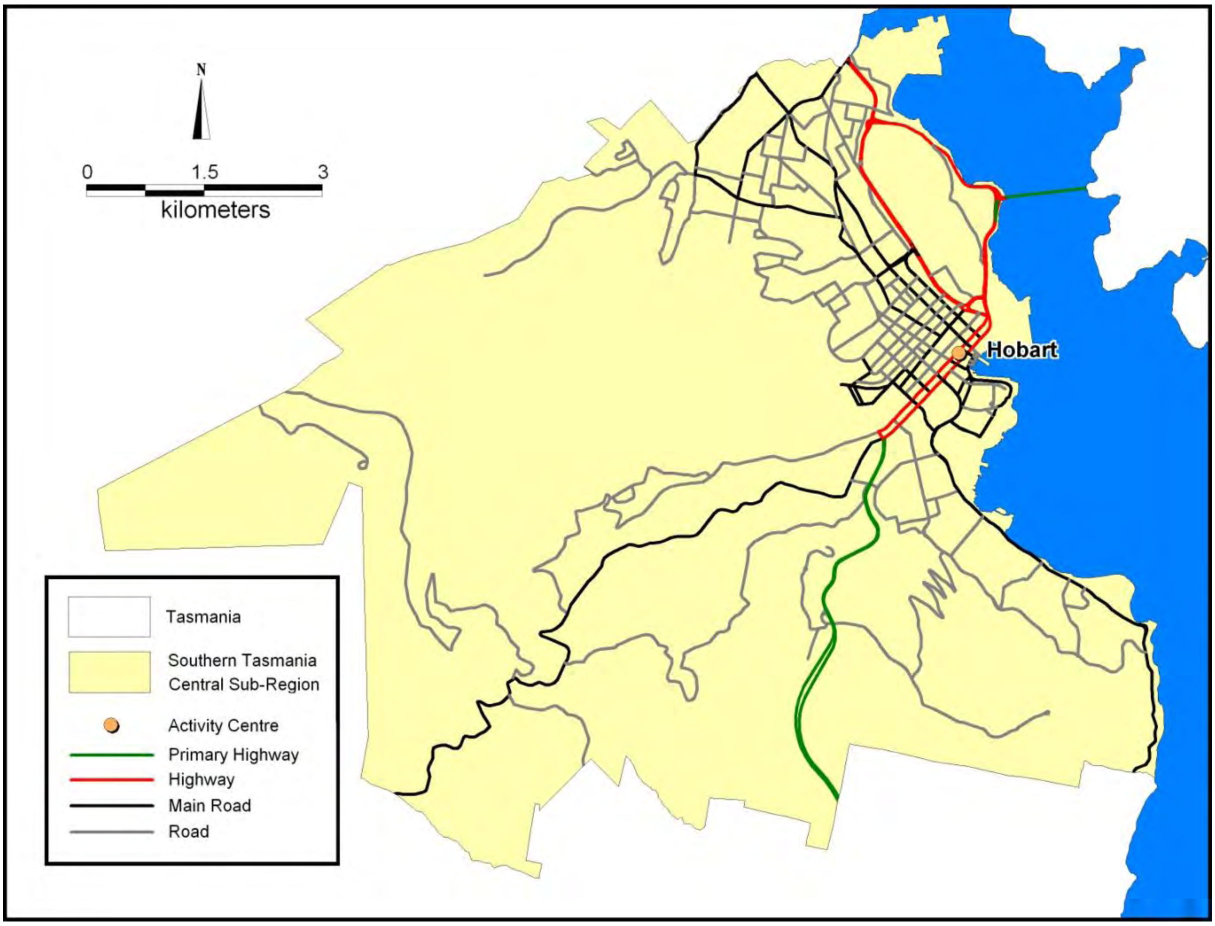
The LGA of Hobart solely represents the Central sub-region with around 48% of the total number of jobs in the Southern Region. The Central area is where the majority of 'government administration and defence' employment is concentrated with 7,295 jobs and approximately 74% total employment. This sector experienced significant growth from 2001 with an additional 2,450 jobs created in the five years ending 2006. This increase represented over 64% of all job creation in the Central sub-region with 'electricity, gas and water services' and 'education' accounting for 334 and 313 additional jobs by 2006. 'Health and community services' is also prominent in the Central area with 7,234 jobs in the sector.

Figure 21. JTW Employment 2006 and 2001- 2006 Change, Central



Source: ABS Journey to Work 2001 & 2006

Figure 22. Central Sub-Region



Source: ABS Census Population and Housing 2006.

Table 12, below, provides a break down of jobs by industry based on Journey to Work data for each LGA in the Southern Tasmania Region. This has also been broken down to a Statistical Local Area level where this information is available.

Table 12. Jobs by Industry, Southern Region Local Government Areas (and Statistical Local Areas), 2006

LGA	Brighton	Clarence	Glenorchy	Huon Valley	Southern Mid.	Central High.	Glamorgan/ Spring Bay	Tasman	Kingborough	Derwent Valley	Hobart	Sorell
Agric, Forestry & Fishing	63 (4%)	327 (3%)	33 (0%)	941 (26%)	437 (42%)	298 (46%)	282 (19%)	119 (18%)	263 (4%)	155 (7%)	320 (1%)	175 (8%)
Mining	6 (0%)	16 (0%)	21 (0%)	4 (0%)	3 (0%)	0 (0%)	3 (0%)	3 (0%)	21 (0%)	3 (0%)	43 (0%)	4 (0%)
Manufacturing	103 (6%)	703 (6%)	3,732 (21%)	323 (9%)	75 (7%)	13 (2%)	163 (11%)	39 (6%)	609 (9%)	527 (25%)	1,547 (3%)	248 (12%)
Electricity, Gas & Water	0 (0%)	26 (0%)	490 (3%)	15 (0%)	3 (0%)	44 (7%)	3 (0%)	3 (0%)	10 (0%)	27 (1%)	925 (2%)	12 (1%)
Construction	165 (9%)	830 (7%)	1,478 (8%)	179 (5%)	26 (2%)	16 (2%)	89 (6%)	12 (2%)	570 (8%)	95 (4%)	1,129 (3%)	152 (7%)
Wholesale Trade	76 (4%)	349 (3%)	1,083 (6%)	161 (4%)	29 (3%)	6 (1%)	40 (3%)	13 (2%)	168 (2%)	34 (2%)	1,126 (3%)	65 (3%)
Retail Trade	307 (18%)	2,396 (21%)	3,166 (18%)	502 (14%)	81 (8%)	22 (3%)	172 (12%)	56 (9%)	1,513 (22%)	293 (14%)	5,565 (12%)	460 (22%)
Accomm, Cafes & Rest	45 (3%)	552 (5%)	458 (3%)	212 (6%)	28 (3%)	78 (12%)	297 (20%)	111 (17%)	284 (4%)	110 (5%)	3,063 (7%)	116 (6%)
Transport & Storage	161 (9%)	443 (4%)	1,374 (8%)	111 (3%)	34 (3%)	21 (3%)	53 (4%)	17 (3%)	149 (2%)	55 (3%)	786 (2%)	76 (4%)
Communication Serv	17 (1%)	200 (2%)	255 (1%)	25 (1%)	19 (2%)	4 (1%)	14 (1%)	3 (0%)	262 (4%)	12 (1%)	577 (1%)	18 (1%)
Finance & Insurance	9 (1%)	230 (2%)	185 (1%)	31 (1%)	8 (1%)	0 (0%)	0 (0%)	3 (0%)	83 (1%)	24 (1%)	2,150 (5%)	18 (1%)
Property & Business Serv	83 (5%)	801 (7%)	1,044 (6%)	157 (4%)	14 (1%)	9 (1%)	72 (5%)	20 (3%)	460 (7%)	107 (5%)	5,050 (11%)	129 (6%)
Govt Admin & Defence	107 (6%)	686 (6%)	625 (4%)	169 (5%)	58 (6%)	51 (8%)	66 (4%)	43 (7%)	464 (7%)	127 (6%)	7,295 (16%)	115 (6%)
Education	279 (16%)	1,268 (11%)	1,073 (6%)	311 (9%)	111 (11%)	37 (6%)	66 (4%)	46 (7%)	697 (10%)	222 (10%)	3,956 (9%)	168 (8%)
Health & Community Serv	175 (10%)	1,299 (11%)	1,509 (9%)	318 (9%)	58 (6%)	18 (3%)	77 (5%)	32 (5%)	759 (11%)	261 (12%)	7,234 (16%)	182 (9%)
Cultural & Rec Serv	49 (3%)	302 (3%)	338 (2%)	56 (2%)	21 (2%)	13 (2%)	45 (3%)	107 (16%)	125 (2%)	14 (1%)	1,477 (3%)	38 (2%)
Personal & Other Serv	82 (5%)	817 (7%)	434 (2%)	83 (2%)	16 (2%)	12 (2%)	24 (2%)	9 (1%)	182 (3%)	54 (3%)	2,104 (5%)	64 (3%)
Non-Class. Economic Units	19 (1%)	135 (1%)	162 (1%)	45 (1%)	24 (2%)	5 (1%)	14 (1%)	18 (3%)	100 (1%)	24 (1%)	337 (1%)	26 (1%)
Not stated	0 (0%)	13 (0%)	9 (0%)	0 (0%)	5 (0%)	0 (0%)	0 (0%)	0 (0%)	7 (0%)	6 (0%)	24 (0%)	4 (0%)
Total*	1,746	11,393	17,469	3,643	1,050	647	1,480	654	6,726	2,150	44,708	2,070

Note the breakdown below of the Derwent Valley, Hobart, Kingborough and Sorell Local Government's into their respective Statistical Local Areas. SLAs are shaded in light grey, with the total LGA in dark grey.

SLA - LGA	Derw. Valley Pt A	Derw. Valley Pt B	Derwent Valley	Hobart Inner	Hobart Remainder	Hobart	Kingborough Pt A	Kingborough Pt B	Kingborough	Sorell Pt A	Sorell Pt B	Sorell
Agric, Forestry & Fishing	50 (3%)	105 (28%)	155 (7%)	184 (1%)	136 (0%)	320 (1%)	161 (3%)	102 (18%)	263 (4%)	94 (5%)	81 (34%)	175 (8%)
Mining	3 (0%)	0 (0%)	3 (0%)	7 (0%)	36 (0%)	43 (0%)	21 (0%)	0 (0%)	21 (0%)	4 (0%)	0 (0%)	4 (0%)
Manufacturing	501 (28%)	26 (7%)	527 (25%)	521 (3%)	1,026 (4%)	1,547 (3%)	551 (9%)	58 (10%)	609 (9%)	225 (12%)	23 (10%)	248 (12%)
Electricity, Gas & Water	8 (0%)	19 (5%)	27 (1%)	14 (0%)	911 (3%)	925 (2%)	7 (0%)	3 (1%)	10 (0%)	12 (1%)	0 (0%)	12 (1%)
Construction	68 (4%)	27 (7%)	95 (4%)	113 (1%)	1,016 (4%)	1,129 (3%)	518 (8%)	52 (9%)	570 (8%)	133 (7%)	19 (8%)	152 (7%)
Wholesale Trade	25 (1%)	9 (2%)	34 (2%)	157 (1%)	969 (3%)	1,126 (3%)	156 (3%)	12 (2%)	168 (2%)	53 (3%)	12 (5%)	65 (3%)
Retail Trade	279 (16%)	14 (4%)	293 (14%)	2,342 (14%)	3,223 (12%)	5,565 (12%)	1,474 (24%)	39 (7%)	1,513 (22%)	431 (24%)	29 (12%)	460 (22%)
Accomm, Cafes & Rest	76 (4%)	34 (9%)	110 (5%)	607 (4%)	2,456 (9%)	3,063 (7%)	199 (3%)	85 (15%)	284 (4%)	104 (6%)	12 (5%)	116 (6%)
Transport & Storage	47 (3%)	8 (2%)	55 (3%)	147 (1%)	639 (2%)	786 (2%)	118 (2%)	31 (6%)	149 (2%)	66 (4%)	10 (4%)	76 (4%)
Communication Serv	9 (1%)	3 (1%)	12 (1%)	469 (3%)	108 (0%)	577 (1%)	259 (4%)	3 (1%)	262 (4%)	15 (1%)	3 (1%)	18 (1%)
Finance & Insurance	21 (1%)	3 (1%)	24 (1%)	1,526 (9%)	624 (2%)	2,150 (5%)	80 (1%)	3 (1%)	83 (1%)	18 (1%)	0 (0%)	18 (1%)
Property & Business Serv	88 (5%)	19 (5%)	107 (5%)	2,070 (12%)	2,980 (11%)	5,050 (11%)	430 (7%)	30 (5%)	460 (7%)	120 (7%)	9 (4%)	129 (6%)
Govt Admin & Defence	104 (6%)	23 (6%)	127 (6%)	3,655 (22%)	3,640 (13%)	7,295 (16%)	448 (7%)	16 (3%)	464 (7%)	112 (6%)	3 (1%)	115 (6%)
Education	186 (10%)	36 (10%)	222 (10%)	437 (3%)	3,519 (13%)	3,956 (9%)	634 (10%)	63 (11%)	697 (10%)	150 (8%)	18 (8%)	168 (8%)
Health & Community Serv	254 (14%)	7 (2%)	261 (12%)	3,092 (18%)	4,142 (15%)	7,234 (16%)	740 (12%)	19 (3%)	759 (11%)	176 (10%)	6 (3%)	182 (9%)
Cultural & Rec Serv	6 (0%)	8 (2%)	14 (1%)	357 (2%)	1,120 (4%)	1,477 (3%)	117 (2%)	8 (1%)	125 (2%)	32 (2%)	6 (3%)	38 (2%)
Personal & Other Serv	40 (2%)	14 (4%)	54 (3%)	1,098 (7%)	1,006 (4%)	2,104 (5%)	169 (3%)	13 (2%)	182 (3%)	61 (3%)	3 (1%)	64 (3%)
Non-Class. Economic Units	13 (1%)	11 (3%)	24 (1%)	73 (0%)	264 (1%)	337 (1%)	87 (1%)	13 (2%)	100 (1%)	23 (1%)	3 (1%)	26 (1%)
Not stated	3 (0%)	3 (1%)	6 (0%)	3 (0%)	21 (0%)	24 (0%)	4 (0%)	3 (1%)	7 (0%)	4 (0%)	0 (0%)	4 (0%)
Total*	1,781	369	2,150	16,872	27,836	44,708	6,173	553	6,726	1,833	237	2,070

*All totals represent 100% of the jobs in each LGA and SLA Source: ABS Journey to Work 2006

Table 13. Jobs by Industry, Southern Region Metropolitan & Non-Metropolitan*, 2006

	Hobart		Metropolitan		Non-Metropolitan		Total Number of Jobs
	Jobs	% Total	Jobs	% Total	Jobs	% Total	
Agriculture, Forestry & Fishing	320	1%	1,336	2%	2,077	28%	3,413
Mining	43	0%	114	0%	13	0%	127
Manufacturing	1,547	3%	7,469	9%	613	8%	8,082
Electricity, Gas & Water Supply	925	2%	1,490	2%	68	1%	1,558
Construction	1,129	3%	4,419	5%	322	4%	4,741
Wholesale Trade	1,126	3%	2,901	3%	249	3%	3,150
Retail Trade	5,565	12%	13,700	16%	833	11%	14,533
Accommodation, Cafes & Rest	3,063	7%	4,628	5%	726	10%	5,354
Transport & Storage	786	2%	3,044	4%	236	3%	3,280
Communication Services	577	1%	1,341	2%	65	1%	1,406
Finance & Insurance	2,150	5%	2,699	3%	42	1%	2,741
Property & Business Services	5,050	11%	7,674	9%	272	4%	7,946
Govt Admin & Defence	7,295	16%	9,419	11%	387	5%	9,806
Education	3,956	9%	7,663	9%	571	8%	8,234
Health & Community Services	7,234	16%	11,419	13%	503	7%	11,922
Cultural & Recreational Services	1,477	3%	2,343	3%	242	3%	2,585
Personal & Other Services	2,104	5%	3,737	4%	144	2%	3,881
Non-Classifiable Economic Units	337	1%	803	1%	106	1%	909
Not stated	24	0%	63	0%	5	0%	68
Total	44,708	100%	**86,262**	**100%**	**7,474**	**100%**	**93,736**

Source: ABS Journey to Work 2006

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

Table 13 shows the importance of the Hobart LGA for providing employment, while also showing that Glenorchy, Clarence, and to a lesser extent Kingborough play important supporting roles for employment in the Region. Table 13 also shows that the vast majority of jobs in most sectors are contained in the Metropolitan area with the exception of Agriculture, Forestry and Fishing. This also shows that a high proportion of jobs in Manufacturing; Construction; Wholesale Trade; and Transport and Storage are in the Metropolitan area, but outside of Hobart. Hobart has a large share of Metropolitan jobs in the areas of Accommodation, Cafes and Restaurants; Finance and Insurance; Property and Business Services; Government Administration and Defence; Education; Health and Community Services; Cultural and Recreational Services; and Personal and Other Services.

3.3.2 Employment Self Sufficiency

Self sufficiency is a measure of an area's potential to employ the local labour force. It shows the number of jobs available in a given area as a proportion of the local labour force. A self sufficiency of 80% would imply 80% of working residents can potentially live and work in the same area. With an estimated 109,400 jobs and 111,916 employed residents in the Southern Region (after scaling), the area has a total employment self sufficiency of 98%.

Self-sufficiency = Total Jobs in the Southern Region/ Total Employed Residents

Employment self-sufficiency is the proportion of jobs actually located in an identified area (e.g. a Local Government Area) relative to the proportion of local residents who are employed in the workforce. If for example, an area has 100 employed residents and 72 local Employment self-sufficiency is the proportion of jobs actually located in an identified area

As the Southern Region encompasses a significant proportion of the State's population, there are a number of industry sectors with a self sufficiency rate around 100% (Table 14). Industry sectors with lower self sufficiency rates suggest that a number of Southern Tasmanian residents travel out of the region to their place of work (on top of residents from other areas entering the region to work). Not surprisingly, the 'mining' sector has the lowest self-sufficiency figure with greatest large proportion of workers travelling abroad to their work destination. The following tables provide break down of self sufficiency by the sub-regions previously identified, all LGAs and the Metropolitan vs. non-Metropolitan split.

Table 14. Employment Self Sufficiency, 2006

	East	North West	South West	Central	Total
Agriculture, Forestry and Fishing	94%	83%	94%	117%	92%
Mining	38%	79%	57%	152%	69%
Manufacturing	53%	129%	67%	146%	100%
Electricity, Gas & Water Supply	11%	125%	10%	212%	102%
Construction	51%	89%	54%	145%	76%
Wholesale Trade	49%	111%	55%	233%	100%
Retail Trade	74%	84%	76%	192%	101%
Accommodation, Cafes & Rest.	67%	55%	61%	188%	100%
Transport & Storage	51%	123%	48%	152%	92%
Communication Services	57%	66%	100%	223%	99%
Finance & Insurance	29%	34%	24%	294%	100%
Property & Business Services	46%	70%	42%	195%	98%
Govt. Admin. & Defence	34%	42%	34%	264%	101%
Education	68%	111%	59%	151%	101%
Health & Community Services	50%	59%	47%	237%	100%
Cultural & Recreational Services	61%	82%	40%	175%	98%
Personal & Other Services	71%	54%	38%	246%	98%
Total	**56%**	**83%**	**56%**	**203%**	**98%**

Source: ABS JTW and Census 2006.[2]

It is clear from the table above that the Central region acts as an employment hub, with a total of 52,163 jobs and 25,647 employed residents. This implies the sub-region has, at least, an extra 26,516 jobs employing the wider Tasmanian community. Low self sufficiency rates in the East and South West indicate that the majority of employed residents must travel abroad to their destination of employment.

This analysis can also be used to highlight industry sectors that are particular prominent and attract employment from outside the local area. In the North West, the industrial sectors appear to be most dominant with 'manufacturing', 'electricity, gas and water supply' and 'transport and storage' all with self sufficiency rates well over 100%. In the East, 'agriculture' employs over 1,000 workers with a self-sufficiency of 94%.

[2] Both Census and JTW data sets have been scaled to account for Census undercounts.

Table 15. Jobs by Industry, Southern Region Local Government Areas (and Statistical Local Areas), 2006

LGA	Brighton	Clarence	Glenorchy	Huon Valley	Southern Mid.	Central High.	Glamorgan/ Spring Bay	Tasman	Kingborough	Derwent Valley	Hobart	Sorell
Agric, Forestry & Fishing	74%	110%	26%	108%	100%	94%	91%	95%	66%	75%	116%	82%
Mining	51%	40%	109%	24%	91%	0%	119%	60%	82%	30%	161%	18%
Manufacturing	16%	46%	194%	69%	28%	34%	106%	87%	67%	93%	146%	54%
Electricity, Gas & Water	0%	8%	169%	37%	14%	133%	0%	78%	5%	46%	213%	20%
Construction	40%	55%	128%	45%	18%	33%	88%	26%	57%	40%	144%	34%
Wholesale Trade	36%	49%	151%	87%	32%	78%	84%	69%	41%	42%	233%	37%
Retail Trade	35%	76%	106%	76%	31%	47%	96%	100%	76%	65%	192%	60%
Accomm, Cafes & Rest	19%	56%	58%	92%	41%	117%	107%	106%	49%	74%	188%	49%
Transport & Storage	60%	56%	173%	62%	34%	66%	81%	62%	42%	36%	152%	28%
Communication Serv	21%	64%	80%	42%	57%	69%	111%	79%	116%	48%	220%	20%
Finance & Insurance	9%	31%	40%	41%	22%	0%	0%	79%	21%	37%	294%	19%
Property & Business Serv	25%	45%	90%	54%	14%	63%	83%	69%	39%	58%	194%	37%
Govt Admin & Defence	31%	31%	41%	46%	43%	85%	85%	79%	31%	48%	263%	29%
Education	118%	67%	111%	90%	82%	94%	97%	92%	51%	126%	151%	61%
Health & Community Serv	32%	52%	70%	59%	29%	45%	81%	67%	44%	51%	237%	35%
Cultural & Rec Serv	48%	55%	101%	52%	54%	105%	128%	120%	37%	35%	175%	30%
Personal & Other Serv	40%	81%	59%	59%	27%	74%	68%	50%	33%	57%	245%	29%
Total	36%	55%	105%	72%	48%	83%	94%	87%	50%	65%	203%	43%

Note the breakdown below of the Derwent Valley, Hobart, Kingborough and Sorell Local Governemnt's into their respective Statistical Local Areas. SLAs are shaded in light grey, with the total LGA in dark grey.

SLA - LGA	Derw. Valley Pt A	Derw. Valley Pt B	Derwent Valley	Hobart Inner	Hobart Remainder	Hobart	Kingborough Pt A	Kingborough Pt B	Kingborough (M)	Sorell Pt A	Sorell Pt B	Sorell
Agric, Forestry & Fishing	63%	82%	75%	0%	49%	116%	52%	114%	66%	66%	111%	82%
Mining	39%	0%	30%	0%	135%	161%	82%	0%	82%	23%	0%	18%
Manufacturing	126%	16%	93%	18311%	97%	146%	67%	62%	67%	55%	49%	54%
Electricity, Gas & Water	21%	88%	46%	476%	211%	213%	3%	45%	5%	20%	0%	20%
Construction	40%	41%	40%	2034%	130%	144%	57%	62%	57%	33%	47%	34%
Wholesale Trade	40%	49%	42%	5427%	202%	233%	41%	47%	41%	33%	83%	37%
Retail Trade	84%	12%	65%	15329%	112%	192%	78%	42%	76%	59%	64%	60%
Accomm, Cafes & Rest	81%	63%	74%	1499%	154%	188%	40%	101%	49%	49%	53%	49%
Transport & Storage	45%	17%	36%	2237%	125%	152%	39%	64%	42%	26%	63%	28%
Communication Serv	66%	27%	48%	0%	41%	220%	125%	16%	116%	17%	77%	20%
Finance & Insurance	44%	17%	37%	22483%	87%	294%	21%	14%	21%	19%	0%	19%
Property & Business Serv	75%	28%	58%	10262%	116%	194%	39%	37%	39%	37%	34%	37%
Govt Admin & Defence	61%	24%	48%	16530%	133%	263%	32%	18%	31%	30%	14%	29%
Education	169%	55%	126%	1976%	135%	151%	50%	67%	51%	58%	111%	61%
Health & Community Serv	68%	5%	51%	13459%	137%	237%	45%	18%	44%	36%	17%	35%
Cultural & Rec Serv	30%	40%	35%	3394%	134%	175%	37%	36%	37%	32%	23%	30%
Personal & Other Serv	60%	49%	57%	19038%	118%	245%	33%	30%	33%	29%	63%	29%
Total	80%	34%	65%	8941%	127%	203%	50%	54%	50%	42%	59%	43%

Source: ABS JTW and Census 2006

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Table 16. Employment Self-Sufficiency, Metropolitan & Non-Metropolitan*, 2006

	Metropolitan	Non-Metropolitan	Total
Agriculture, Forestry and Fishing	83%	101%	93%
Mining	73%	47%	69%
Manufacturing	105%	63%	100%
Electricity, Gas and Water Supply	103%	68%	101%
Construction	80%	44%	75%
Wholesale Trade	104%	71%	100%
Retail Trade	104%	69%	101%
Accommodation, Cafes and Restaurants	100%	97%	100%
Transport and Storage	97%	58%	92%
Communication Services	102%	57%	98%
Finance and Insurance	104%	33%	100%
Property and Business Services	101%	52%	98%
Government Administration and Defence	105%	55%	101%
Education	102%	89%	101%
Health and Community Services	103%	54%	100%
Cultural and Recreational Services	100%	86%	98%
Personal and Other Services	102%	53%	98%
Total	**101%**	**72%**	**98%**

Source: ABS JTW and Census 2006.[3]

*Metro Hobart includes Hobart, Brighton, Clarence, Derwent Valley, Glenorchy, Kingborough, and Sorell.

Not surprisingly, Metropolitan Southern Tasmania has a self-sufficiency of over 100%, meaning there are more jobs in the Metropolitan area than there are employed residents. Whilst some residents of the Metropolitan area would travel outside the area for work, the majority find work within the area, with a number of persons entering the Metro for work every day.

3.4 Jobs and Industry Summary

Across the Southern Tasmania region employment is dominated by Retail Trade, Health and Community Services, Government Administration and Defence. These are followed by Education, Manufacturing, and Property and Business Services, all at around the same proportion. Across the region employment is dominated by retail and government related employment. Given that the bulk of government related employment will be attracted to the CBD (apart from population based services such as education, local health services, customer service centres), this leaves relatively little apart from the traditional retail employment in activity centres. While a range of employment in professional services, finance and insurance, and personal services, will continue to locate in centres, these are likely to relatively small scale, serving the sub-regional market, and there is

[3] Both Census and JTW data sets have been scaled to account for Census undercounts.

likely to be limited employment to significantly boost employment diversity in activity centres. While not generally located within activity centres, employment in the sub-regions is bolstered by manufacturing, wholesale, transport and distribution and other population services (health and education) which retain activity within the sub-regions.

Employment growth from 2001-2006 has been dominated by Government Administration and Defence (approximately 3,250 jobs), of which most has been concentrated in Hobart LGA (approximately 2,500 jobs) in or near the CBD. The CBD is the major supplier of jobs for the region and these jobs are dominated by Government Administration and Defence, and Health and Community Services. Between these two sectors the Government (either State or Federal) is the biggest employer. The location of a large range of government offices in Hobart will continue to attract more of the same for the ease of doing business that this facilitates. The decision of government about future investment in Hobart will have a significant impact on future growth and development, although the current focus is unlikely to change. These sectors were followed by Retail Trade, Property and Business Services and Education.

Hobart provides around 48% of the total jobs in the Southern Tasmania region, but only around 20% of the population. If this balance of jobs is maintained, access to the CBD for commuters, shoppers, and those doing business will need to be carefully managed to ensure good access is maintained.

Generally the East, North West and South West sub-regions as defined by SGS with regard to geographic and accessibility constraints have employment generally dominated by population driven sectors of Retail Trade, Health and Community Services, and Education. The North West region however, has the largest proportion of employment in Manufacturing, which is concentrated in Glenorchy and to some extent Brighton. The South West has a high level (second largest sector) of employment in Agriculture, Forestry and Fishing. In both of these cases the two exceptions of Manufacturing and Agriculture, Forestry and Fishing have declined between 2001 and 2006. These are employment sectors which have relatively little employment based in activity centres and therefore the diversity of employment in activity centres will be likely to remain low.

The East region has approximately 17% of employment in Southern Tasmania and 29% of the population. The North West region has approximately 25% of employment in Southern Tasmania and 32% of the population. The South West region has approximately 11% of employment in Southern Tasmania and 19% of the population. Therefore it is clear the each sub region requires jobs which are not located in the sub-region. While some of these may be provided in other sub-regions, a large proportion of them are expected to be provided in Hobart, particularly in the areas of government, administration, retail, finance, and cultural services.

4 Major Projects

4.1 Regional Development

Significant regional development projects have the potential to enhance or detract from the ongoing viability of existing and potential centres. The literature outlined in Section 2 has identified several significant projects that require consideration. These include transport projects that will affect centre accessibility, and retail/ commercial developments that will affect both floorspace levels and inter/intra-centre competition. Relevant projects and their potential implications are discussed below.

4.2 Transport

The transport projects being undertaken in Southern Tasmania (outlined below) are primarily focused on upgrading the capacity and efficiency of road and rail infrastructure in the primary transport corridor to the North of Hobart. This corridor links Hobart to the Northern region of Tasmania and has a critical role to play in freight distribution between Tasmania's key ports, as well as for consumer and employee access to the Southern Region. Projects such as the Brooker Highway upgrade and the Bridgewater Bridge focus on improving road capacity, while the Brighton and Bagdad Bypasses address congestion issues and remove heavy traffic flow from residential and retail centres. The proposal for an express bus lane along the Brooker Highway would also improve public transport access within this corridor. The development of the Brighton Transport Hub coincides with a number of these developments, providing a centre for rail and road transport integration, and subsequently a significant industrial node that will expedite freight movement within the region. This is complemented by a rail capacity upgrade between Brighton and Anitll Ponds.

To the south-west of Hobart, the Kingston Bypass plays a similar role to the two Northern Bypasses, making way for the ongoing growth and development of the Kingston activity centre.

The Victorian Activity Centre Design Guidelines (Victorian Department of Sustainability and the Environment, 2005) outline a series of nine objectives for the delivery of best practice centres, with two referring to transport. These are:

1. **Promote a public transport focus**: Better integrate public transport with activity centres by increasing community comfort, safety and accessibility.
2. **Increase accessibility and integration**: Ensure activity centres are a focus for the entire community, are accessible to all, and are physically integrated with the surrounding neighbourhood.

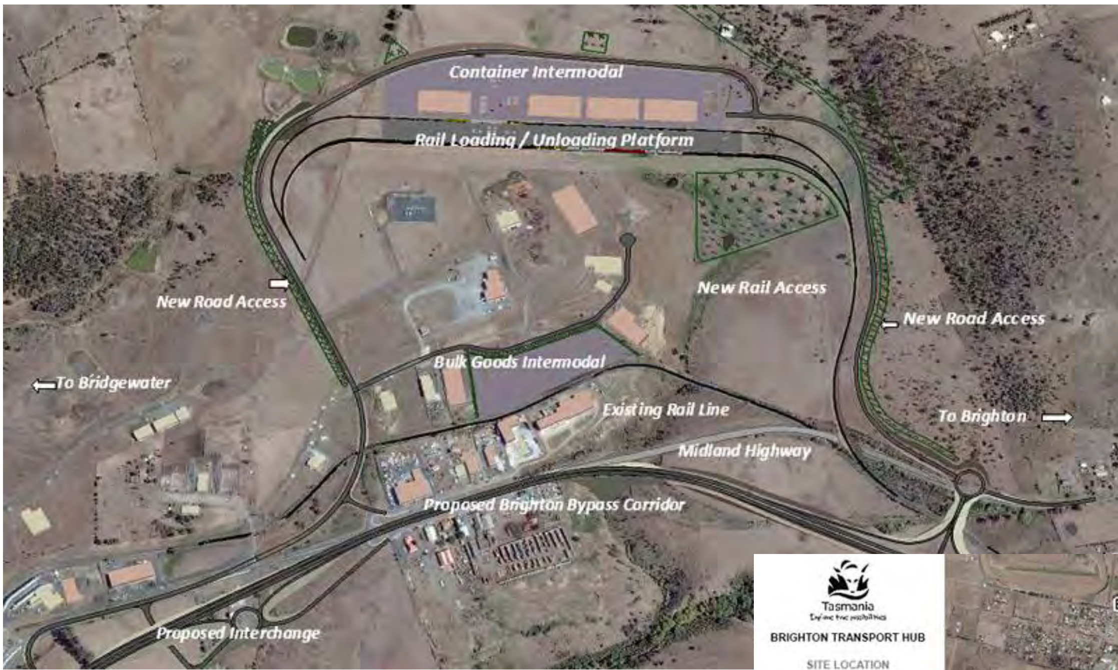
The transport projects underway in Southern Tasmania primarily address the second of these objectives, increasing ease of access between centres, and removing heavy traffic from interfering with the physical integration of centres with the surrounding neighbourhood. In addition, the provision of an express bus lane along the Brooker Highway will improve public transport access to the region's primary activity centre, the Hobart CBD.

Development/ Project

Transport Hub – Brighton LGA

The Brighton Transport Hub Project is a $79 million Tasmanian Government funded project and will involve the construction of a modern road-rail facility and freight distribution hub at Brighton. The Hub will be a modern facility allowing freight goods to be transferred between road transport and rail and enable efficient movement of freight between the south and northern Tasmania's ports.

The development of the hub at Brighton will create significant locational efficiencies for nearby commercial entities. This will cement the role of Brighton as a critical industrial centre in Southern Tasmania.



Source: DIER website

Development/ Project

Brighton Bypass – Brighton LGA

Planned in coordination with the Brighton Transport Hub, the Brighton Bypass is a $164 million investment in upgrading the Midland Highway to the north of Hobart, funded by the Australian Government.

The Brighton Bypass will provide improved connections to, and support for, the development of the new freight transport hub at Brighton, and will also address traffic movement, safety and amenity issues associated with a major freight route passing through the towns of Brighton and Pontville. It will also support improved access to the East Coast, including for forestry freight vehicles accessing the Triabunna woodchip mill and port via Tea Tree Road.

The bypass will assist freight transport to the Hub at Brighton, reinforcing the significance of the commercial centre at Brighton.

Source: DIER website

Bagdad Bypass – Southern Midlands LGA

The Bagdad Bypass will be located north of Brighton in the Bagdad Rivulet Valley, approximately 30 km north of Hobart. The Bypass will extend for 12.5 km between Pontville and Dysart. It will build on the improved connections to the Brighton Industrial Estate and future Brighton Transport Hub created from the Brighton Bypass, further adding to the commercial value of Brighton as a key centre.

Bridgewater Bridge – Brighton LGA

The Bridgewater Bridge is a critical component of the northern approach to Hobart and is symbolic as a gateway to Tasmania's capital city.

Over the next 20 years, the Bridgewater Bridge will need upgrading with DIER undertaking planning work to develop options for a replacement Bridge. DIER is updating previous studies undertaken to take account of new issues such a climate change impacts in order to meet requirements to secure Australian Government funding.

Development/ Project

Refurbishment work on the Bridgewater Bridge will be carried out to ensure that an appropriate level of service continues while planning works are undertaken.

This project is significant as it addresses the upgrade of a key entrance statement to Hobart, reinforcing it as the primary activity centre for the Southern Tasmanian region.

Brooker Highway Upgrade - Hobart, Glenorchy and Brighton LGAs

The Brooker Highway is Hobart's major road connection to Brighton in the North, and beyond to the cities and towns of Northern Tasmania. It is a part of the National Highway Network and is one of Tasmania's busiest highways. A commitment has been made to fund road works to improve efficiency, reduce congestion, and improve safety at both the Elwick Road Junction and the Howard Roundabout highway intersections.

These works will reduce congestion and reinforce the role of Hobart as the primary activity centre. Centres to the North of Hobart, including Brighton, will also benefit significantly from this upgrade.

Source: GHD, from DIER website

East Derwent Highway Improvements – Brighton LGA

Approximately $1.8m ($1.6m – State Government, $0.2m – Brighton Council) is being invested in the improvement/ upgrade of the East Derwent Highway.

The dual purposes of the upgrade are safety improvement and improved access into South Gagebrook.

Development/ Project

Lyell Highway Upgrade - Glenorchy/ Derwent Valley LGA

The Lyell Highway upgrade involves the staged investment of $15 million over four years to improve traffic flow between Granton and New Norfolk. The improved road infrastructure will increase the prominence of, and commercial connection to both centres.

Express Bus Lane, Brooker Highway - Glenorchy, Hobart LGAs

In addition to the current Brooker Highway upgrade, there is also a proposal for a dedicated priority bus lane along the Brooker Highway, focused upon providing express transport between Glenorchy and the Hobart CBD. There is also some potential for an express link to Glenorchy CBD from adjoining municipalities to the North, subject to investigation of customer travel behaviour in the source municipalities.

The development will theoretically improve consumer and employee access to both Glenorchy and Hobart, reinforcing their significance in the activity centre hierarchy.

Kingston Bypass – Kingborough LGA

During 2007 the Australian Government committed $15 million, and the Tasmanian Government an additional $26.5 million to the Kingston Bypass.

The bypass commences south of the Kingston Interchange and passes underneath Summerleas Road west of the existing Channel Highway. The alignment is located approximately parallel to Whitewater Creek before rejoining the existing Channel Highway at Alonga Road. Construction is expected to start in January 2010 (subject to EPBC approval) with a planned completion date of June 2012.

The Bypass will also facilitate several future developments in the area, including the further expansion of a Catholic secondary school, housing development at Huntingfield, the relocation of Kingston High School and the Kingborough Sports Centre expansion.

Each of these developments reinforces the role of Kingston as the primary activity centre to the South-East of Hobart.

Source: DIER website

Development/ Project
Rail Capacity Upgrade – Brighton LGA The Australian Government has provided funding of $31.6 million over four years for the increase of freight capacity and rail safety between Brighton and Anitill Ponds. Along with the development of the rail and freight hub at Brighton, this reinforces the role of Brighton as a critical commercial activity centre.

4.3 Recent and Proposed Retail and Commercial Projects

Retail and commercial developments in Southern Tasmania are listed in Table 17 below. These developments are primarily located in the City of Clarence, to the east of the Hobart primary activity centre, and also include a group located in the Hobart CBD. Each retail development, however, is in a different location, adding to the series of emerging retail nodes in the area. While each of these developments on their own would not significantly alter Clarence's retail hierarchy, the regional impact of the combined developments threatens to oversupply the retail market. This concern is particularly prevalent in the case of the two "big box" style developments at both Cambridge and the Hobart International Airport, with plans for the Airport site having to be reduced in order to prevent mutual economic detriment to both centres. In addition, concern was raised in the International Airport Economic Impact Assessment that the development of significant big box retail would disrupt the retail hierarchy in Clarence and the broader Southern Tasmanian region.

Other retail developments identified in the review include the Kangaroo Bay development in Bellerive, and the Museum and Wharf redevelopment projects in Hobart. All three projects serve to reinforce the existing primary activity centre statuses of Hobart in the region, and the City of Clarence sub-region.

Only two significant commercial developments were identified in the literature review. These were the Aurora Energy Operations Centre, and the Hydro Tasmania Consulting Office Complex which are now complete. Both projects are large scale developments on greenfield land, adding significant commercial floorspace to Cambridge. These developments have contributed to the growth of a commercial node in the area, however further commercial development is uncertain.

Table 17. Retail and Commercial Projects

<table>
<tr><th>Development/ Project</th><th>Status</th></tr>
<tr><td>Kangaroo Bay Boardwalk - Clarence LGA

The Kangaroo Bay Boardwalk development is the first major component of the Kangaroo Bay Urban Design Masterplan. The development will provide for continuation of the foreshore pedestrian and cycle trail, more community events in new public spaces, and new cafés and waterfront businesses. This will add prominence to Rosny Park/ Bellerive as a significant retail activity centre and further add to the growing strength of the Bellerive boardwalk area as a focus for events and community activities.


Source: Clarence City Council website</td><td>Planned</td></tr>
<tr><td>DFO at Hobart International – Clarence LGA

An Economic Impact Assessment has been undertaken for the development of a DFO and Homemaker centre at Hobart International Airport. Initially planned to provide an additional 73,000sqm of retail space, the project has been scaled down to 10,000 sqm at the DFO (50 shops) and 30,000sqm at the Homemaker centre. The project has not proceeded to date.

The development would add to the large number of “big box” retailers in Clarence, with the homemaker component competing with the facility nearby in</td><td>Approved but not commenced</td></tr>
</table>

Development/ Project	Status
Cambridge. As a component of the EIA, it was noted that a potential impact of the development would be the degradation of the current retail hierarchy; namely, that the scale and character of the development would inhibit further retail development within the current centres and reduce local shopping opportunities for residents.	
Homemaker Centre at Cambridge - Clarence LGA According to the Economic Impact Assessment, the approved Homemaker Centre development at Cambridge was forecast to provide 200 jobs, and an additional 39,000sqm of retail floor area. At the time of the EIA, the development intended to be the sole homemaker centre for the Southern Tasmanian district, generating significant consumer demand and patronage. Details of the relative trading strength of the Cambridge Homemaker Centre were not available for this study and any such investigations were beyond the scope of this study. Visits to the centre in November 2009, and informal discussions with traders at this time, revealed that some retail sectors appeared to be trading well while others were experiencing lower levels of trade. In general there is some evidence of weakness at the centre although it is showing signs of strengthening over time. At the time of the site visits in November 2009 there was one vacancy which had been the case for some months. The centre is highly dependant on the presence of a major anchor tenants in order to attract trade (via single purpose trips) to this centre. The development of Direct Factory Outlet retailing at the airport (already approved) will not directly compete with the Homemaker Centre if it maintains an emphasis on clothing and fashion, but would further add to passing trade in the area. Since the Homemaker Centre is established in Cambridge it is desirable that it operates successfully in this role and complements retailing elsewhere in Greater Hobart.   *Source: realcommercial.com.au*	Opened March 2008

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Development/ Project	Status
Aurora Energy Operations Centre - Clarence LGA Aurora energy has invested $14.5 million in the development of a new administration building and storage facility at Cambridge. The new development consolidates the Southern operations of Aurora in one location, providing 58,000 sqm of additional commercial floorspace in Cambridge.	Opened
Hydro Tasmania Consulting Office Complex - Clarence LGA Similarly to Aurora, Hydro Tasmania has recently invested in the development of a new office complex, in this case investing $25 million in office space (7,500sqm) for 300 consulting employees. Together, these two facilities represent a significant commercial investment in Cambridge, reinforcing its value as a key commercial activity centre for industry requiring well serviced, large, greenfield sites.	Opened in 2008
Lauderdale Retail Centre - Clarence LGA In 2008, Macroplan undertook an Economic Impact Assessment for the proposed retail centre development at Lauderdale. The centre was proposed to play a neighbourhood retail centre function, providing access to currently unavailable retail, convenience and community services. This development would elevate Lauderdale in the region's retail hierarchy should it proceed. The Council has determined that further investigation is required to ensure that this does not unbalance Clarence's retail hierarchy, or affect the pre-eminence of Rosny Park as Clarence's primary retail node.	The RPDC did not approve the development based on its potential adverse impact of future retail hierarchy, particularly the potential development of a more suitably located centre.
Tasmanian Museum and Art Gallery Redevelopment – Hobart LGA A master plan has been developed for the redevelopment of the Tasmanian Museum and Art Gallery Complex into an iconic, world-class facility. While not specifically a retail facility, the redevelopment of this facility into a cultural icon will assist in attracting additional tourism patronage and retail expenditure to Hobart, and reinforce Hobart as the primary activity centre in Southern Tasmania.	Master Plan stage
Franklin Wharf Improvement Project – Hobart LGA The Franklin Wharf Improvement Project aims to manage the balance between the commercial needs of port users with the needs of visitors, pedestrians and cyclists taking advantage of the public open space and nearby attractions and restaurants.	Planning stage

Development/ Project	Status
The project will assist in providing an amenable space for multiple users, and reinforce this lower level activity hub within the principal Hobart activity centre.	
Hobart CBD – Hobart LGA Hobart City Council has provided details of a number of development which are in the planning stage, recently approved	
Cnr Argyle and Melville Streets – 11 levels; 3,390sqm supermarket ; 6,000sqm office	Unlikely to proceed at this time
Cnr Liverpool and Murray Streets – 13 levels; 890sqm retail.; 12,100sqm office	Before RMPAT but approval expected
Melville Street – 3,360sqm office developed in Stage 1 and further 5,6690sqm in Stage 2	Timing unknown
Cnr Argyle and Liverpool Streets – 2,686sqm supermarket; 800sqm retail at street level ; 4,645sqm of office	Timing unknown
Parliamentary Precinct – planned net addition of 2,500sqm	Early stages of planning
Montpelier Retreat – retail and apartments	Status unknown
3 Victoria Street – 6 levels; 2,723dqm of office	Recently approved by Tribunal

4.4 Land Use Change

There is significant land use change proposed in Brighton and Kingborough. Significant land use change (relevant to this report) includes:

- Brighton;
  - Commercial rezoning at Green Point;
  - Commercial and mixed use in Brighton Town Centre;
  - Commercial for highway services precinct north of Bridgewater;
  - Mixed Use at Green Point (just north of the Bridgewater Causeway);
  - Residential and Rural Living near Brighton;
- Kingborough - Use of the relocated High School site for a variety of retail and commercial uses, as well as car parking;

- Clarence – Cambridge; and
- Hobart International Airport.

4.5 Residential Growth

Residential growth is anticipated throughout the region to various degrees, however the following areas have been identified as accommodating most growth within the various Council areas.

- Brighton;
- Bridgewater;
- South and west of Kingston;
- Consolidation in Clarence's inner urban areas;
- Continuing growth around Rokeby and Oakdowns; and
- Huon Valley residential growth is intended to be in the services settlements of Huonville, Cygnet, Geeveston, Dover and to a lesser extent Franklin – infill is to be promoted for more efficient use of infrastructure and community facilities.

4.6 Summary and Implications

Major transport projects will assist the development of Kingston, and facilitate additional development and land use change at Brighton and Bridgewater. Other transport projects will improve access through Glenorchy LGA for cars and buses, assisting the development of this area. Major developments in Cambridge and the Airport threaten to weaken the existing network of activity centres, while development in the CBD includes a variety of projects which will strengthen its role and add at least one supermarket. Under current planning documents significant residential growth and activity centre growth is anticipated for Brighton, Bridgewater and Kingston. However according to the Southern Tasmanian Councils Authority it is highly likely that the residential policy direction of the regional planning project will try and refocus residential growth back into Glenorchy, Hobart, and Clarence.

5 Major Retail and Commercial Trends

This section details some recent trends in retail and commercial development in Australia and more particularly recent development in the Greater Hobart area.

5.1 The Importance of Retailing

As highlighted in the introduction to this report, communities identify strongly with (and value) their activity centres. Importantly, activity centres are not just dispensers of retail goods and services. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment, and places for living through new forms of higher density housing in mixed land use settings. By providing identifiable locations for social, cultural and economic interaction and exchange, well planned activity centres display a strong 'sense of place' (something people value highly) and provide a focus for community life and association. Larger, regional activity centres will work more effectively (socially, culturally, economically and environmentally) if they perform a multitude of functions.

Having said that, retailing remains a key component of any activity centre and, with the exception of specialist activity centres that may be anchored by a health, research or education institution for example, the retail 'offer' is more often than not the primary reason for residents and visitors to patronise the centre. Therefore, the basic 'building block' of an activity centre network and hierarchy is in most cases retail activity. Centres that generate a 'large' number of retail visits from a 'large' catchment are well placed to accommodate other regional scale activities such as community services and other commercial activities. This is because retailing generates a large number of trips for a variety of purposes (from daily, weekly and more infrequent purposes). This enables other land uses to co-locate with retailing and thus generate co-location benefits. This includes the ability to undertake multi-purpose trips (e.g. shopping plus entertainment plus business in the one location) and share common infrastructure (e.g. public transport, open space and parking). It should also be recognised that local retail centres are important for convenience and providing sustainable access to regular retail needs. These local retail centres do not need to have the same range of functions and play a vital part in the broader retail hierarchy.

The following are some pertinent retail and commercial trends which are affecting the form and functions of activity centres around Australia.

5.2 The Evolution of Retailing

Powerful social and economic trends are affecting the way people use their local retail and commercial centres and the sorts of retail services and facilities they seek. These trends include the growth in convenience retailing, the re-emergence of the traditional strip retail centre and the continued growth of the 'café society'. Another important form of retailing impacting on activity centre (and other commercial / industrial) land use requirements, and which has gained a significant share of the market in recent years, is the large format, stand-alone category-based form of retailing, often referred to as 'bulky goods' retailing. These retail trends are described below.

5.2.1 The Evolution of Supermarkets

Supermarkets have captured a large share of the growth in retail expenditure in recent times. They have broadened the range of goods on offer and are taking on a 'mini-centre' role within shopping centres. They have included specialist activity nodes within their floorspace – butcher, baker, greengrocer, delicatessen and are now including banking and post office activities. For example, Woolworths has developed petrol outlets as an associated use after entering into an agreement with Caltex to establish this type of retail facility. Coles-Myer has a similar arrangement with Shell. And the breadth of retail services available through the (now much larger and more sophisticated corner petrol station) continues to deepen with the exclusive arrangements now being struck with banks to locate their ATMs in these 'convenience store petrol stations' (for example ANZ ATMs in Caltex service stations). All of this means that people now have a much wider choice of options to shop for their daily convenience needs at all hours of the day or night.

In Australia, supermarkets have long been the anchors for larger shopping centres. Recently, the size of these supermarkets has increased; in particular, there is a dominance of main line supermarkets such as Woolworths or Coles. The market share of the two main supermarket companies: Woolworths and Coles was 70.9 percent in 2001, in 1997 it was 61.6 percent (Retail World, 2001). These large supermarkets are winning market share aw ay from the specialist food outlets such as butchers or greengrocers.

Interestingly, a spin off effect has been the emergence of greater numbers of small supermarket operators such as those affiliated with petrol stations or the small express supermarkets in the CBD. At present it appears that Woolworths and Coles dominate the supermarket retailing in the Southern Tasmania region centres (like mainland Australia), although IGA and Foodworks are well established. Moreover, in Australia generally there has also been an increase in the number of discount supermarkets such as ALDI, although it is noted that ALDI have not yet established stores in Tasmania, and other new discount chains may also take longer to establish. Given the relatively small market in Tasmania and the greater costs associated with delivery of retail services it is expected that the establishment of other supermarket chains would put downward pressure on grocery prices. However the smaller market and high initial costs of establishment (stores and distribution networks), will make it difficult for smaller supermarkets to break into the market. Recent legislative changes prevent the previous situation of supermarkets entering into agreements with shopping centre owners whereby other supermarkets were excluded. This is a positive for encouraging greater supermarket competition in Australia, and may particularly improve competition in Southern Tasmania.

There has also been an increase in Tasmania of small boutique local shops that specialise in Tasmanian grown and produced foods. This includes Hill Street Grocer, Foodstores at Bellerive and Lenah Valley, the Salad Bowl in South Hobart, and Lipscombe Larder in Sandy Bay and New Town.
There has also been a shift towards smaller supermarkets in suburban locations that provide a broad range of goods and high quality produce but in a location which is very convenient to suit the needs of an increasing time poor, but discerning shopper. Such smaller local supermarkets are

important within the broader hierarchy to provide a high quality retail service but one that is also easily accessible, and therefore offers sustainability advantages.

5.2.2 The Importance of Convenience

Further to the previous point, consumers are showing a greater demand for convenience shopping and less loyalty to a particular centre, such as the corner store. This is a natural outcome of a wealthy, but time poor population. Greater demands on time, and a propensity for more frequent buying of basic grocery items, means that shoppers value a quick and convenient shopping trip.

The time-conscious convenience shopper will frequent retail and entertainment facilities that can meet their expectations for convenience and familiarity, where they can purchase what they need when they need it with little or no delay. This is consistent with the growth of suburban shopping centres, which increasingly offer a greater variety of goods. Such convenience may also play an important role in assisting to reduce environmental impacts associated with travel to retail and associated services. However, any potential benefits may be offset if shoppers bypass local centre for the "convenience" of centres further away.

5.2.3 The Continued Growth and Expansion of the Planned Shopping Centre

Centre retailing consists of two main types – the more traditional strip centre (refer below) and the more modern and larger planned shopping centre (e.g. Centro, Westfield, etc.). These centres are generally anchored by a mix of supermarkets, department stores and discount department stores (DDSs) and also usually house a wide range of specialty shops often dominated by various retail franchises. These centres are often formula based in terms of the retail mix they provide, their layout, etc.

These large, modern retail centres have continued to expand and grow in recent years with many of the large centres getting even larger (witness Chermside in Brisbane or Chadstone in Melbourne for example). The Southern Tasmania region contains a number of such centres in Eastlands Shopping Centre, Northgate Centre, and Channel Court. Around Australia these types of centres are tending to also diversifying their offer whether it be in retail mix or by way of the type of retail setting (for example, some planned centres now have internal 'main streets' which attempt to replicate the traditional strip centre.

The recent redevelopment of Channel Court in Kingston has provided a blend of large managed shopping centre with interior spaces and shop front exteriors with footpaths and car lanes. This is not quite "main street" but it is not a fully enclosed mall feel either. Eastlands at Rosny Park has also developed some shop fronts to address part of the car park, giving it a friendlier, more active face. Northgate is an example of a shopping centre that has opened with more of a street feel than many other shopping centres and includes a few shops with external access/faces.
While offering significant employment opportunities, the planned shopping centres do not usually offer a diversity of employment choice offered in more traditional centres where a strong office / commercial component is usually evident. In a number of areas of the Southern Tasmania region

these large retail based centres are supported by more traditional strip shopping or office based employment (e.g. Rosny Park, Glenorchy, Kingston). Around Australia some standalone shopping centres (existing and new) have recognised the advantages of adding office based employment. Such advantages include diversity of income stream, additional centre activity, additional retail demand, and drivers for improved amenity.

5.2.4 Planned Neighbourhood and Community Centres

Smaller, purpose designed and developed centres, usually up to 10,000sqm are becoming more significant elements in the hierarchy of retail centres. Typically, they contain a discount department store (DDS) and / or a supermarket and around a dozen specialty shops. If there is no DDS they are likely to have a larger range of specialty shops. They have less 'frills' than the larger centres and are focussed on providing a high degree of accessibility and convenience for the daily/ weekly shopper (i.e. the time scarce shopper). These types of centres are typically focused on retail services only and do not include office based employment. Existing examples of this type of centre are Shoreline shopping centre in Howrah, Covehill in Brighton.

5.2.5 The Fall and Rise of the Traditional Strip Centre

Newer planned regional shopping centres have impacted significantly on the welfare of the traditional strip-type centres, both in capital cities and in regional centres. One of the advantages that traditional strip centres can offer over the large planned centres is a much greater range of rents and a lower rental base generally, plus an open air, smaller scale environment with more customer recognition than the large planned centres. This allows them to provide many non-national brand retail outlets plus complimentary activities, such as cafes, bars, local business centres (including PO boxes and administrative services). The fringes of strip centres in particular offer low cost opportunities to act as 'incubators' for new businesses. Strip centres also provide a truly public space along the street, as compared with the semi-public, highly controlled internal spaces of shopping malls. This has the advantage of providing an enhanced opportunity for social interaction and all the colour and attraction of "street life".

The Moonah and North Hobart strips are good examples of revived strip shopping areas, however in the case of North Hobart the focus has changed to mainly include restaurants and bars. Sandy Bay has also retained a degree of vitality. This can enhance their attractiveness as a destination and allow alternative niche positions to be developed. The developers of planned neighbourhood and district centres are beginning to replicate the strip centre precinct in response to growing consumer demands for interesting retail experiences that offer a point of difference, no matter what the scale.

At the same time traditional strip centres may face significant challenges including a high level of dispersion (with a lack of a well defined "centre"), poor amenity due to heavy road traffic, lack of suitable open space, and poor accessibility. The lack of single ownership means that it is harder to coordinate reinvestment to keep these areas looking fresh, or to manage 'gaps' in the range of products offered by seeking particular specialists to tenants vacancies. Local government business development officers (or similar) may be able to assist in this as have some past government initiatives such as ‘Main Street’. An analysis of existing strip centres should aim to indentify particular issues as a starting point to put in place positive actions for improvement.

5.2.6 Urban Quality as an Investment Attractor

The amenity of a city, suburban or regional centre is important for economic prosperity as it represents a significant means of attracting new business investment and activity because of the ‘address factor’ that the centre will retain. Improving the amenity of the public realm represents an appropriate means of encouraging an enhanced range of business and community service sector activities. It is also important for attracting people to work and live in an area. Land use planning, which encourages reinvestment and redevelopment, and a range of land use activities in centres is a critical factor for improving urban amenity and is important in attracting people to want to live, work and shop in or proximate to a centre.

5.2.7 Department Stores

The rise of “category killers” and outlet centres appears to be damaging the trading of traditional department stores. A practice once confined to discounting slow moving, shop-worn and slightly damaged merchandise from the department stores main stores has become a market in its own right. It is feared that the success of factory and warehouse outlets will continue to cause trading difficulties for department stores as shoppers become accustomed to the discounted prices. Certainly, retail spending trends suggest that these fears are well founded.

According to press commentary, traditional department stores are beset by a complex set of the problems, including:

- they’re overstocked;
- it is difficult for customers to get in and out quickly in a ‘cash rich, time poor’ society;
- they’re dull, featuring unadventurous stock and unimaginative merchandising;
- they’re lagging smaller store chains in computerisation for stock control and marketing research; and
- they have largely conceded to the competition, particularly big box discounting.

Nevertheless, this form of retailing is not dead yet. David Jones has demonstrated that the department store can be reinvented and refreshed, with sales success. However, David Jones does not have a presence in Tasmania. Myer has been less successful but, in recent years, has shown a greater commitment to experiment and repackage its offer, including with the use of themed floors. This experience shows that middle income customers can be wooed back. Myer has only one store in the Southern Tasmania region. Half of the Myer store burned down in late 2008 and this ‘half’ has been reopened on separate premises on the edge of the Hobart CBD. Negotiations are still under way to start rebuilding the store. The CBD has suffered but survived the disruptions to this key anchor tenant.

The future prospects for department stores are also underpinned by the fact that shopping centres still need anchors, although in the Southern Tasmania region the market size means that shopping centres are generally smaller and a department store is not viable in most cases.

5.2.8 Large Format, Category-based and 'Big Box' Retailing

These outlets are typically located in low cost buildings in low rent areas. Thus they often seek locations away from the main centres in highly accessible (by car), high profile locations such as on major arterials, and with ample land for large car parking areas (usually at grade). It should be noted however that in the case of Hobart there is a relatively small cluster of these stores adjacent to the CBD including Office Works, Freedom, and Harvey Norman. While this shows that it is possible to locate some of these uses near the CBD, such a location does present more challenges in assembling suitable sites and overcoming heritage constraints. It is also the case that some recent developments of this type do not present as "low cost". While the underlying building may be a relatively low cost structure the finishes, materials and design that are used create an attractive development.

The major element in this sector are the 'category killers', that is, stores selling many brands of a particular product type at highly competitive prices, warehouse or factory outlets and the general bulky goods stores (e.g. furniture and white goods). The advent of "category killers" is driving a significant proportion of hardware, paint, nursery plants, toys and baby care retailing out of traditional trade channels and into large specialized stores. These larger stores have far stronger purchasing power, passing some of these savings to customers, stronger marketing, better retail store positioning than their smaller competitors and are usually part of global supply chains enabling them to access goods at very competitive prices.

Bulky goods are only one component of this retail category and using this term alone is not appropriate. This is because the types of retail goods available from these outlets are both bulky goods (like furniture) and small goods such as screws and nails or small electrical appliances like kettles and toasters. The traditional bulky goods retailing such as furniture and white goods, often require larger floor areas which cause them to seek lower rent structures. They are also less reliant on foot traffic to trade effectively compared to other types of retailers. For this reason they are often found on industrial lands along major highways. Research by Jones Lang LaSalle found that bulky goods made up more than 40 percent of all retail construction underway in the first half of 2006, indicating that the sector is expanding rapidly. This is evidenced by recent development for this type of retailing at Cambridge and the proposal for more at Hobart Airport. It should be noted that Cambridge Park was approved by the State Government's Resource Planning and Development Commission and Airport development is subject to Commonwealth approval of its Master Plan (and not State or Local Government approval; see Section 5.2.11). These are prime examples of bulky goods retailing establishing outside of main retail areas, with good access by car only. These proposals add to existing concentrations of this style of retailing at Rosny Park (Bunnings Warehouse, and small Retravision - Harvey Norman relocated to Cambridge Park), Hobart CBD fringe (Harvey Norman, Mitre 10, Freedom, Barbeques Galore, Forty Winks, etc.) and Glenorchy/Derwent Park/Moonah (Clive Peeters, K&D and various other furniture and floor covering shops).

This sort of activity commands a very large catchment, and in order to achieve economies of scale requires substantial parcels of (more affordable) land offering plenty of parking, usually in greenfield areas in 'out-of-centre' locations. Given the land and space requirements of these large format retail outlets, the term 'big box' retailing is a suitable title. As the population of Greater

Hobart and its surrounding region grows, so too will the market for this form of retailing and the demand for (most likely out-of-centre) land that comes with it. However care should be exercised in the location of such centres. If such uses are too far out of centre, and too isolated from immediate population and passing trade, even large scale proposals may struggle to attract suitable market share. Such as situation may then be used to argue for a broader range of retailing, which creates an activity centre which directly competes with established activity centres.
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In general, bulky goods do not compete with regional shopping centres, their tenants simply cannot afford the rents in regional centres and do not require the foot traffic to trade effectively. Nevertheless, the concern is that the original intention of this out-of-centre retailing has been corrupted by the attraction of retailers who do not require the special nature of these areas but simply want to take advantage of the lower rents.

As land costs are a significant part of total development costs, some retailers specifically choose land in poor quality, low cost former industrial areas but on main thoroughfares (ideally the junction of two) and then drive traffic to their stores through heavy advertising. The success of the pioneer sort then creates passing trade that attracts others, and the value of the initial real estate development represents a substantial capital gain. Arguably this is happening in Derwent Park, however, in a manner which is consistent with the planning scheme for this area.

In a growing number of more recent developments a homemaker or bulky goods centre will incorporate a range of smaller retailers not traditionally found in such centres. These smaller retailers provide a greater choice of retailing and support shoppers accessing the bulky goods retailers. Resultantly, they are increasingly becoming destination shopping venues, offering a substantial range of merchandise at more competitive prices than can be offered by traditional department and speciality stores.

In many cases this has resulted from a lack of clear planning guidance, as a vague definition of bulky goods has resulted in council approving inappropriate forms of out-of-centre retailing. However, as can be seen in the Hobart experience, out of centre retailing has also resulted from approvals processes that are out of councils control. While 'bulky goods' may require larger sites and rely more on cars, the more other forms of retailing settle in these areas the more it affects the sustainability of existing retail centres.

5.2.9 Outdoor, Large Format Retailing

Related to the large format, category-based form of retailing is the relatively recent expansion of outdoor, large site retail activities. These include for example, nurseries and garden supplies centres, timber yards, car, boat, caravan and campervan sales outlets and do-it-yourself (DIY) equipment hire outlets. While this form of retailing has been around for many years, it is only in more recent time that, like the category-based retailing referred to above, they are increasing in size (and therefore, land requirements) in order to serve very large catchments, offering highly competitive prices through the realisation of significant economies of scale.

Given the fact that this form of retailing is often of an 'industrial nature' with negative off-site externalities (e.g. noise from timber cutting, smell from fertilizer or dust from soil and sand), it is often more appropriate for these uses to locate in or immediately adjacent to light industrial zones where these adverse impacts can be minimised or neutralised. These activities have established in the Mornington light industrial estate and Derwent Park for example.

A related emerging form of retailing which is gaining prominence in all of Australia's capital cities is the direct factory outlet (DFO). This use tends to be located in industrial areas and typically includes household goods and clothing and footwear. Some DFOs locate in large shopping centres or at markets but all rely on the benefits of co-location or agglomeration where shoppers can touch and feel comparable items. In most cases, this retail use requires extensive site areas and parking. In recent years, DFOs have begun to establish in designated precincts in or proximate to major airports, as has been proposed for Hobart Airport but already exist in many other capital cities. Development on major airport sites is subject to Federal Minister for Infrastructure approval, not local or state government approval making control of this form of development difficult to regulate within the local planning framework.

Despite their requirements for space and high exposure, many of the outdoor large format retailing activities could well be located in or adjacent to activity centres where they could help underpin the vitality of the centre through economies of agglomeration and reduce the burden on infrastructure through greater consolidation of retail and commercial land use.

5.2.10 Impact of New Technologies

Last century saw a decline in home delivery services (e.g. milk and bread) and a growth in self service in retailing because of the rise of car ownership and the demand for larger outlets. More recently, there has now been a re-emergence of home based shopping through new technologies such as the internet and the demand from time poor customers. The impact of this on shopping centres is likely to be incremental and unevenly spread. It is probable that electronic retailing is likely to affect particular types of goods, for example CDs and books, more than say clothes or furniture. At present, the best selling online items include computers and consumer electronics, books, flights/holidays and event tickets (IBISWorld Industry Report, 2005). Moreover, some small niche retailers, such as independent clothes designers, are also embracing online retailing.

It was initially thought that food and grocery e-tailing would have a large role to play however at present groceries only represent less than 1 percent of the total volume sold (IBISWorld Industry Report, 2005). It is likely that internet grocery sales will continue to grow but only at a very slow rate, despite the efforts of Australian internet-only operators such as greengrocer.com.au to boost interest. There is some disagreement as to the extent that e-tailing will threaten conventional retailing in the future. E-tailing can provide convenience and variety, but it is unlikely that shops will be shutting their doors just yet. The internet is far more likely to complement rather than replace traditional shopping. Currently, there is evidence to suggest that instead of purchasing on the internet customers are using websites as a way of browsing and researching products. The following factors currently restrict the uptake of internet retailing:

- distrust in giving credit card details;
- lack of availability;
- cost of packaging and postage;

- people not at home to receive goods;
- concern over personal fit/size of item and returns policies;
- inability to see or feel products;
- lack of familiarity / social interaction with vendor; and
- web costs can be high for retailers.

It is also interesting to note that there is a distinct geographic dimension to e-tailing. Over 50 percent of e-tailing customers are from towns with populations under 50,000 people and only 2 percent live in big cities. They also tend to be 25-30 years, highly educated, early adopters of internet with professional occupations. Therefore it appears that where there is convenient opportunity to physically examine goods this remains the preferred option. It is expected that the traditional experience of shopping will continue to attract customers because of the opportunity for social interaction it provides, entertainment opportunities (more and more linked with retailing) and the sensory experience of different sights, smells, sounds. The take up rate of e-tailing will also depend on the convenience of accessing physical retailing and the trade off between the desire to physically examine goods versus the effort and cost required to do so.

5.2.11 Airport Centres Development

Major airports have typically been developed on Federal Government land. The recent trend of the Federal Government is to lease major airports to commercial operators on long term agreements. This has meant that airport operators have explored opportunities to expand commercial enterprises where they typically have significant developable land. This typically includes Direct Factory Outlets, supermarkets, and office development to expand on traditionally aeronautical related industrial and commercial activities. This growing commercial focus has been further facilitated by the fact that development on major airport sites (leased from the Commonwealth) is subject to Federal Minister for Infrastructure approval, not local or state government approval. This makes it difficult to regulate the form of development within the local planning framework.
Hobart International Airport is operated by Hobart International Airport Pty Ltd (HIAPL) under a 99 year lease from the Federal Government.

The airport currently has the following commercial operations

- public car parking, operated by HIAPL;
- car rentals, operated by the major Australian and other local operators;
- privately operated hotel (opened December 2008 with 78 rooms, restaurant and conference facilities);
- privately operated child care centre;
- privately operated public fuel outlet;
- Australian Federal Police; and
- Australian Quarantine Inspection Service facilities (AQIS).

Figure 23. Hobart International Airport

Source: Hobart International Airport Website

According to the 2009 Hobart Airport Master Plan (Preliminary Draft) a low development scenario of 294,500sqm of commercial floorspace could be developed over the 2009-29 period. Again, according the Airport Master Plan, this level of floorspace, in combination with terminal based employment, would be expected to take Airport accommodated employment from approximately 250 to 2,120.

The Airport Master Plan includes the following commercial precincts. This table and the following Master Plan (Figure 24) show that a significant amount of commercial development could be accommodated on the Airport, however the take up rate would be dependant on market demand over time.

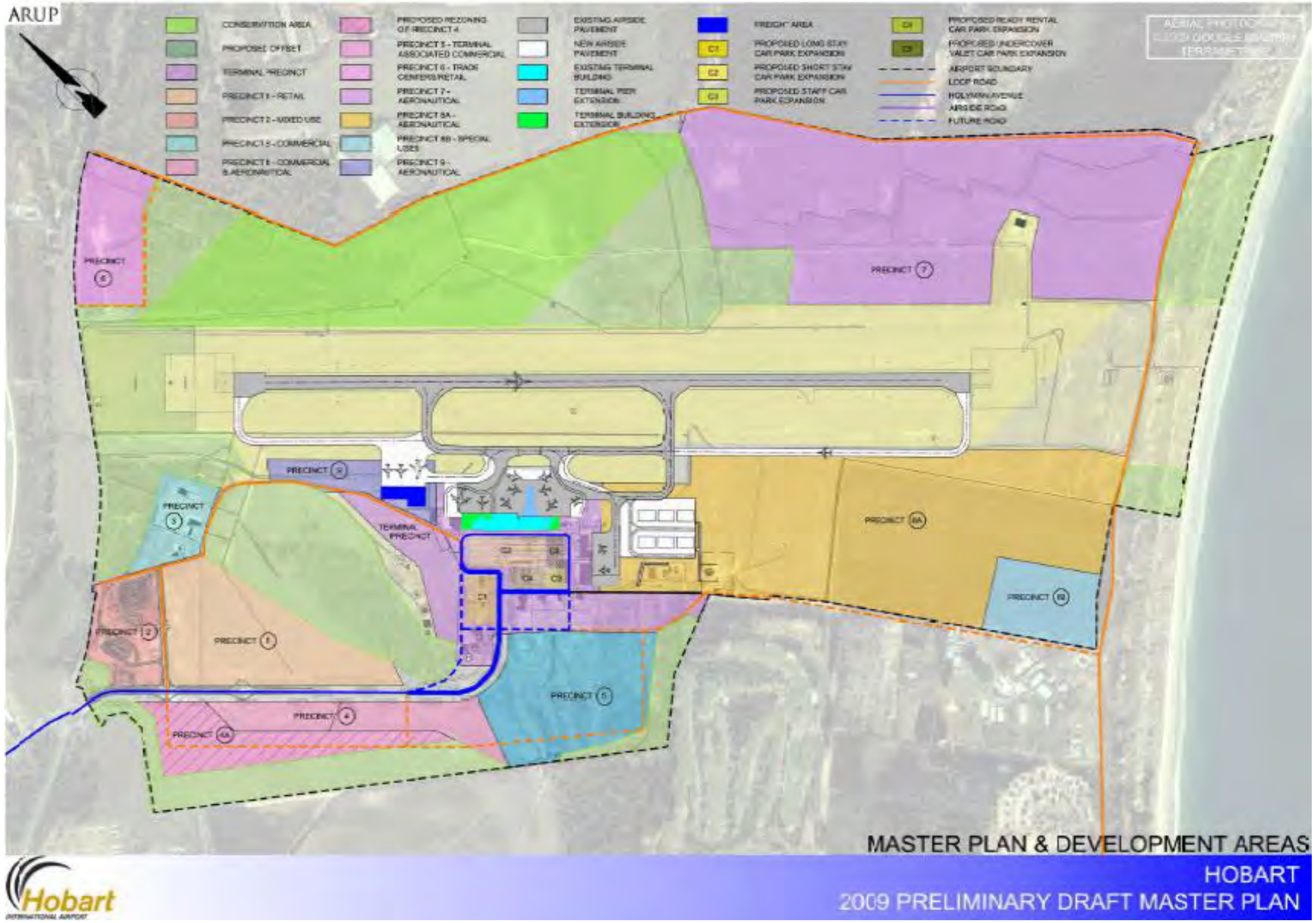
Table 18. Hobart Airport Master Plan Precincts

Precinct	Uses
1	**Retail - Uses including but not limited to retail and bulky goods.** Precinct 1 includes the approved Direct Factory Outlet (DFO) development, Homemaker Centre and Bunnings. In total, the precinct delivers approximately 60,000m2 of retail space surrounding a centralised car park.
2	**Mixed Use and Commercial - Uses including but not limited to hotel, fuel station, fuel retail, child care centre, kennels, other retail and restaurants** The most developed of all the precincts, Precinct 2 already contains the new hotel and fuel station, caravan park, an existing child care centre and kennels for Quarantine. It is proposed that additional retail / mixed use development occur along the southern part of Loop Road benefiting from frontage to passing traffic.
3	**Commercial - Uses including but not limited to aviation-related businesses, industry and freight logistics.** Located adjacent to the Tasman Highway and the airside boundary, Precinct 3 has visual prominence and is considered to have commercial potential for high quality office developments for airlines, government agencies and service providers as well as enabling airport-related industries that can capitalise on airside access in the longer term.
4	**Commercial and Aeronautical - Uses including but not limited to commercial space and aviation-related businesses, including retail, showroom, sales yards, convenience retail, commercial uses, aviation office accommodation, Antarctic administration/operations centre and hotel accommodation.** Located adjacent to Holyman Avenue, Precinct 4 comprises valuable well-located and flat development land and HIAPL envisages using this Precinct 4 for Commercial and Aeronautical uses. 8.4 hectares of land has already been identified for Commercial land use in the 2004 Master Plan. The edge of this area is demarcated by the swale drain to cater for stormwater runoff and disposal from the proposed DFO site opposite Precinct 4 in Precinct 1. It is proposed that the zoning of a further 10.5 hectares of the area be changed to Commercial and Aeronautical use. 10.5 hectares are provided elsewhere on the Airport site, within land not required for development, as 1:1 offset for the rezoning of this green area, as described in Section 12. HIAPL envisages a potential use of Precinct 4 for headquarters and aviation-related facilities in support of the Australian Antarctic Division, and potentially for other Antarctic nations. In addition, other opportunities exist for commercial and office uses given the prime location along the main access road into the Airport.

Precinct	Uses
	Commercial development will be undertaken so as not to reduce the water holding capacity of the swale drain which runs along the edge of Precinct 4 and 4A on the Master Plan layout in Figure 24.
5	**Trade Centres and Retail - Uses including but not limited to commercial office space, trade centres, retail and rental car-related uses.** Precinct 5 has the potential to be attractive for a range of development types. It is anticipated that the proximity of the precinct to the Terminal itself could attract commercial development with direct relationships to air travel and aviation services. Proximity to Holyman Avenue is anticipated to also attract other commercial developments with the potential to create an office / business park arrangement
6	**Aeronautical - Uses including but not limited to general or light industry, warehouse or stores.** HIAPL see Precinct 6 as offering a unique set of land uses that build of the surrounding existing food-based industries such as Barilla Bay (oysters) and to the east of the airport itself agriculture including berries and viticulture. The precinct accordingly has potential for a unique food preparation, food distribution and light industrial use.
7	**Aeronautical - Uses including but not limited to a Centre of Excellence for aviation education and training.** Through its proximity to the airport runway, this precinct has the potential to deliver a range of complementary aviation uses, including a possible Centre of Excellence Aviation, education (TAFE) and training facilities as well as associated commercial and aviation-related facilities. The land within Precinct 7 is also subject to a freehold arrangement and as such is required to undergo a different development process to Commonwealth land.
8a	**Aeronautical - Uses including but not limited to General Aviation, freight and logistics** With strong ties to terminal and apron areas, the Precinct 8a offers a range of opportunity to accommodate complementary aviation uses including large warehouse type uses such a freight and freight logistics.
8b	**Recreation - Uses including but not limited to tourism, convention centre and accommodation** Precinct 8b has a unique point of difference in that it has direct access to beach frontage onto Frederick Henry Bay to the south. Building on this location and its attributes, there is a longer term potential to include a short-stay accommodation zone including recreation and other related tourist uses which might be attractive to air travellers who wish to be close to the airport itself. The land within precinct 8 is also subject to a freehold arrangement and as such is required to undergo a different development process to Commonwealth land.

Precinct	Uses
9	**Precinct 9 – Aeronautical** **Uses including but not limited to Terminal Expansion, Airside Freight Facilities** Precinct 9 offers the potential for apron expansion and the inclusion of aviation and freight uses. Equally, the precinct can absorb future terminal expansion should this be required. Access to the precinct is possible via the redeveloped Loop Road or Holyman Avenue.

Figure 24. Hobart International Airport Draft Master Plan



Source: Hobart International Airport Preliminary Draft Master Plan, 2009

Previous work by SGS (DFO at Hobart International Airport, Economic Impact Assessment, 2006) indicated that the likely crowding out effects of the proposed DFO and associated retail development would be substantial. That is, the projected retail spending for Greater Hobart was assessed as being insufficient to absorb the expected turnover at the Airport. As a result, retail turnover elsewhere in the Greater Hobart economy was likely to decline significantly (by ~10%). Alternatively, the lack of consumer spending power may prevent the DFO and Homemaker Centre reaching stated development levels.

These findings are reinforced by expected effect of the recent Cambridge Park (39,000 sqm retail floor area) competing development. This site has taken some time to attract the desired market share, but the centre has steadily strengthened its level of trade.

More recent assessment by SGS (Hobart International Airport, Economic Impact Assessment of Master Plan Realisation, 2009), found the following estimated impacts:

- **High scenario**: In 2012, when fully operational, there is likely to be an oversupply of retail space associated with department stores, clothes and soft goods, and household goods. This oversupply of some 17% will lead to a significant underperformance of such space, either at the Airport or elsewhere. If development goes ahead it is possible that it will struggle for at least five years commencing 2012.

- **Low scenario**: Under this scenario, the 2013 oversupply is much less material, only 6%. Consequently, underperformance will be commensurately less and it may take only 2 to 3 years to be appropriately absorbed by the market. The further expansion of 10,000 sqm in 2017 and 2018 is expected to pose no material adversity in the Greater Hobart economy.

Some short term accommodation facilities at the airport are considered suitable in this location as they serve a number of specific needs, not served by facilities in other centres. This includes the need to catch early flights, particularly when catching connecting flights interstate. Another advantage of short term accommodation here is the nexus to campervan hire at the airport and the ability to easily access flights either directly before hire pickup or directly after return.

5.3 Commercial and Government Office Development

5.3.1 Centre-based Commercial Activity

Activity centres are a location for business, government and community services as well as retail activities. A major determinant of a firm's office location is the location of the end market or customer. If the customer is located in a particular geographical area, and proximity is an important sales factor, the firm will be more likely to have a physical presence in that area. However, if a firm has a client base that is geographically dispersed, the locational preference may be based more on key inputs into the business process, which in many cases is a skilled workforce when dealing with business services. With this in mind, office types can be classified as follows.

- **Local offices** - this comprises local business services that primarily serve the local or regional population, for example, accountants, solicitors, real estate agents, government services and related business services that have a local orientation. These activities are predominantly located in major activity centres but can also be found in local or neighbourhood centres depending on the size and settlement pattern of the population they serve as well as local planning parameters.

- **Advanced business services** - this segment comprises 'new economy' businesses that offer highly specialised services potentially serving local, national and international clients. Key vocational criteria for this segment are access to the highest quality skills and business networks (i.e. being 'close' to partner firms and clients). 'Lifestyle' is important to this group, because of the need to attract and retain skilled workers. Advanced business services tend to locate in the CBD of their capital city or in prominent major centres. Advanced business services are particularly attracted to the CBD in Hobart because of the highest capacity and security of high speed data lines. This sector includes most engineering, accounting, legal, planning, major real estate and property management, communications, etc firms. These tend to dominate the CBD corporate sector firms in Hobart. A Technopark was established by the State Government in Glenorchy (targeting call centres, high tech start-ups) about 20 years ago. The demand for this centre has changed over time to now host mainly commercial and office tenants.

- **Corporate headquarters** - this encompasses 'large' firms and institutions like leading companies, stock exchanges, core government offices, and major health and education facilities. A location that provides access to quality infrastructure, skills, related business services and a prestigious address is typically desired. Quality access to a wider population base via road and public transport links is also important. Firms in this category tend to demand a CBD address or a high profile suburban / regional centre site with good access to managerial and executive labour. With some exceptions, Government offices like to be close to the Ministers office which is usually near Parliament. There are few corporate headquarters in Tasmania or Hobart.

Government offices dominate Hobart City, accounting for about half of the office floor space in larger buildings in the CBD. Efforts to decentralise have occurred, but these have rarely been successful, due to the desirable CBD location close to Parliament and the relevant Ministers. Some constituency offices are located in suburban centres. Government office tenants are a key driver for any large new office development proposals, as there are few other tenants who would provided such long term leases and large floorspace requirements to make such projects viable.

Given the strong three armed radial pattern of Greater Hobart, the CBD has a natural advantage in being centrally located for businesses that seek to be accessible to a Greater Hobart client base or workforce. Its attraction is further enhanced by the presence of the specialist retail and cultural and entertainment offerings of the city.

These business types are usually centre-based but can locate in a number of settings. This is where planning policy can have an important supply-side influence on economic development and employment creation. Centres that are geared towards particular business typologies will have a greater chance of attracting those businesses and the jobs that come with them.

5.3.2 Other Office Types and Locations

These include:

- **Back offices of large firms** - call centres and data processing centres that serve a wide market favour locations that have a relatively skilled but stable workforce with few alternative employment opportunities. Low property costs are also desired by these operations because they generally occupy 'large' horizontal floor plates. This sector is relatively 'footloose' and will tend to locate where the key criteria of affordable land and access to a stable workforce can be met.

- **Offices attaching to industry and institutions** – a significant stock of office activity will attach to industry, research facilities and institutions such as manufacturing precincts or university and hospital precincts. These types of activities will usually locate in industrial zones (in the case of manufacturing-related office activity) or in designated specialist activity centres such as business parks (in the case of hospitals, research precincts and education institutions). As the institutional activity at the specialist centres (such as the University) grow, so too will the demand for office space. Research is increasingly significant in the Tasmania market. This includes the Menzies Centre, CSIRO, TAFI, and Antarctic Research Division (ARD). While some of these have labs they also require a major component of offices. Some of these are located in the CBD, while some are located in a business park setting or in a relatively isolated situation e.g. ARD at Kingston.

- **Office tower** – Many firms will seek out a centre-style office setting for their business. Such locations offer benefits in terms of: co-location with other firms / organisations (providing agglomeration benefits) and activities that offer a wide range of services (including lifestyle services); the opportunity for face-to-face business contact; quality information and communications infrastructure; and good accessibility by multi-modal transport systems (including road and radial public transport services). Some firms will seek an activity centre environment for their office premises. Such locations offer many of the benefits of an activity centre location, but on a smaller scale. This type of office development has not been developed in Tasmania at this time.

- **Campus-style office** - Some firms favour campus style accommodation. This refers to buildings on 'large' sites, high quality 'detached' buildings with large floorplates and superior landscaping (perhaps in conjunction with recreation facilities and cafes). Examples would be the CSIRO on the waterfront or the Antarctic Research Division in Kingston could be classified in this way. Another example is the Hydro Tasmania offices in Cambridge Park, in a precinct set up to provide for campus style offices as well as large format retailers. High profile street frontages are desired for the corporate address. Note that this segment of the commercial office market tends to differ from the activity centre office market because sites and facilities of this nature are generally difficult to find in traditional activity centres. Organisations that favour this type of accommodation will therefore tend to look for out-of-centre sites, much like the freestanding shopping centre.

5.3.3 Non-CBD Offices

In the previous section it was noted that most office development is located in the CBD. While reliable statistics for suburban office space are not readily available, it is estimated that the CBD accounts for about 80% of all office space in Greater Hobart.

Office developments in suburban centres such as Glenorchy, Rosny Park or Kingston are limited in scale and generally tenanted by suburban service providers (accountants, smaller engineering and building industry professionals, some health services, government service offices and political constituency offices). Earlier attempts to de-centralise some State government offices were not sustained, as agencies relocated to the CBD when permitted later. As noted earlier, government offices are the dominant market sector within the Greater Hobart office market.

There are no business parks as such in Greater Hobart. The State Government established the Technopark in Dowsing Point, a suburb of Glenorchy, about 20 years ago. It was established to form a cluster of innovative businesses and has hosted business incubators, a variety of research and hi-tech manufacturing and a major call centre. Many tenants had initial subsidies to establish. Some office space was used by government providers of business support services. The demand for this centre has changed over time to now host mainly commercial and office tenants.

A number of research related developments have been located around Hobart such as the Tasmanian Aquaculture and Fisheries Institute (Taroona) and the Antarctic Research Centre (Kingston). These are relatively large stand alone developments with significant office components but also specialised research and logistical facilities. They are not readily tenantable by other general office users.

One notable exception to the concentration of larger offices in the CBD, the Hydro Tasmania Consulting office was opened in May 2008 at Cambridge Park, not far from the Airport. This has allowed the consolidation of operations in a single location, compared with the previous situation of having three offices across Hobart and Moonah. The new offices of about 9,000sqm are 5 star Green Star rated. Areas such these have the advantage of significant land area to create an attractive campus style office node, however have poorer transport options and fewer adjacent services.

5.3.4 Recent Office Growth

As mentioned previously office development in Greater Hobart is strongly focused on the CBD and this is the only area for which there are reliable long term statistics (see Table 19). It has traditionally grown slowly and sporadically, reflecting relatively weak demand growth and a high level of government influence on the CBD office market. Historically it has been hard to establish new office space on the strength of private sector demand alone in Hobart. There are few large private companies capable of taking on long term leases for sufficiently large areas to ensure adequate financial security for developers. Thus new office space has often been tied to expansions and relocations by government agencies. It should be noted however that recent office development has occurred in Cambridge Park (Aurora and Hydro) which together have a floorspace of approximately 65,000sqm. This represents an significant increase in office floor space which is

40% more than that added to the CBD in the last significant growth period of 1990 to 1993 (see Table 19).

The amount of office floor space in the Hobart CBD increased strongly from January 1990 essentially peaking by the end of 1993, adding about 46,000 m^2 or 16% to stock in that period. However, there was almost no growth in occupied floor area in the same period and vacancies went from 3.0% to a maximum 16.4%.

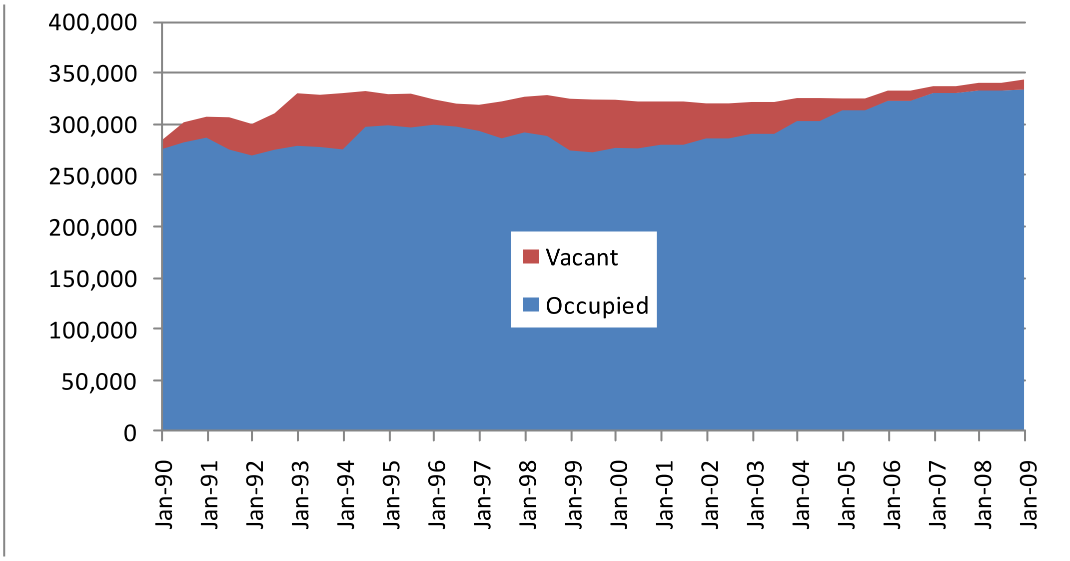
While some occupancy growth occurred in 1994 (spurred on by rent and incentive competition) there was no sustained growth. In fact, occupied floor areas declined through the late 1990s reaching a low point in 1999. In part this was a reflection of the loss of Commonwealth Government offices in the State and paring back of State government departments in response to very high debt levels. Since 1999 there has been relatively steady growth in occupied floor area, about 2.0% per year. The growth since 1990 could be split into two periods; 1990 - 1993 with approximately 15,500sqm of growth per year, and 1993 – 2009 with approximately 800sqm of growth per year.

In the period between the 2001 and 2006 Censuses, there was strong growth in industry sectors that occupy office space. However, this has been strongest in the government sector, with total employment in Government Administration and Defence growing by about 50% in the five year period in the City of Hobart. In comparison, employment in Finance, Insurance and Business Services has grown by only 5% over the same period. Notably, this private sector employment shifted significantly to the Hobart inner area from other parts of Hobart City in this period, with employment growth in Hobart Inner[4] of 20% being recorded.

Growth has slowed since 2007 to less than 1% per year. Renewed growth in stock did not begin until 2003, averaging 1% per year. The result was that vacancies fell from nearly 50,000sqm to under 10,000sqm in January 2006. For the last four years new stock has roughly matched growth in occupied floor areas, but in the last two years vacancies have slowly risen, though they are still well below interstate capital cities.

[4] Hobart Inner as defined by the ABS statistical local area is bounded by Barrack, Brisbane, Campbell and Macquarie Streets

Figure 25. Occupied and Vacant Office Space, 1990-2006



Source: Australian Office Market Report 2007

Table 19. Office Floor Space 1990-2007

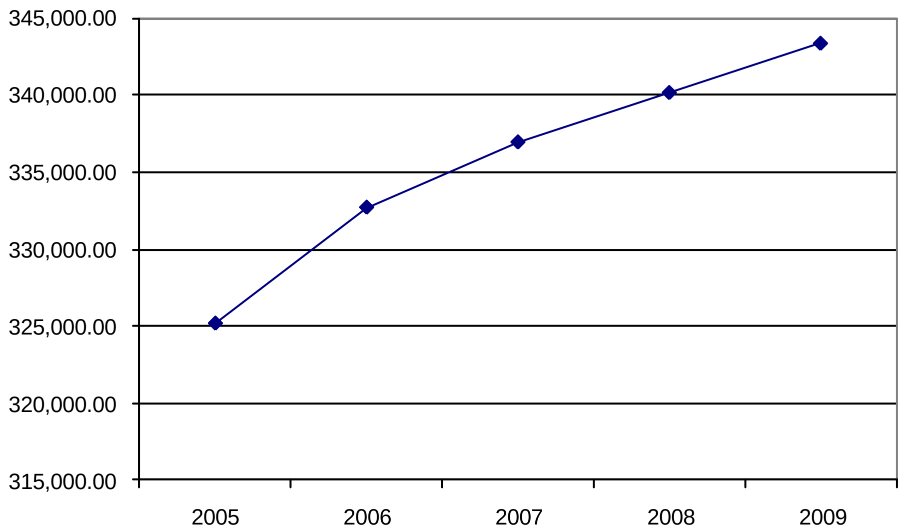
Period	Stock (m^2)	Direct Vacancy (m^2)	Sub-lease Vacancy (m^2)	Total Vacancy (m^2)
Jan-90	284,377	7,291	850	8,141
Jan-91	307,565	20,073		20,073
Jan-92	300,625	26,195	4,111	30,306
Jan-93	330,113	40,990	9,500	50,490
Jan-94	330,277	45,894	8,218	54,112
Jan-95	329,253	27,294	2,603	29,897
Jan-96	324,290	22,830	1,595	24,425
Jan-97	319,057	23,733	1,346	25,079
Jan-98	326,774	32,098	2,177	34,275
Jan-99	324,869	41,535	8,156	49,691
Jan-00	323,886	42,558	3,705	46,263
Jan-01	322,225	40,837	747	41,584
Jan-02	320,400	31,539	2,127	33,666
Jan-03	321,731	28,897	1,703	30,600
Jan-04	325,500	21,211	901	22,112
Jan-05	325,151	9,964	1,432	11,396
Jan-06	332,685	7,154	2,707	9,861
Jan-07	336,925	5,819	748	6,567
Jan-08	340,134			7,404
Jan-09	343,334			9,638

Source: Australian Office Market Reports, Various up to Feb 2009

5.4 Current Office Market

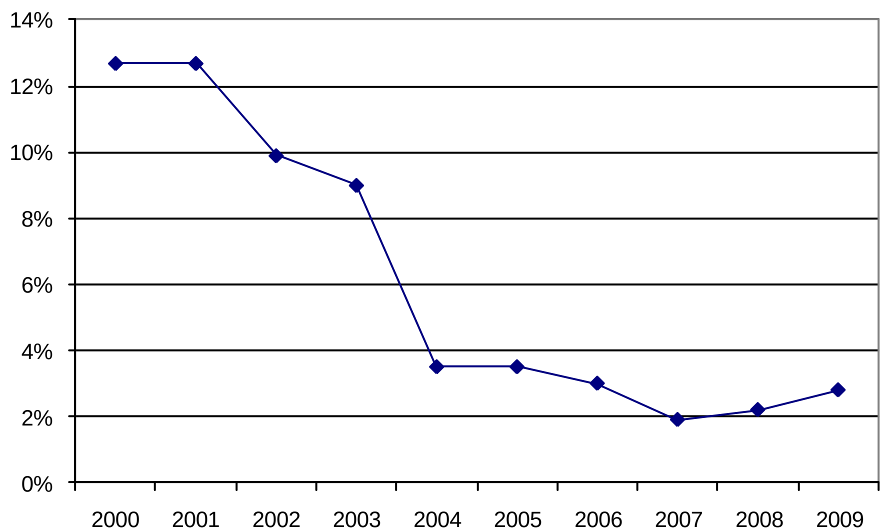
The Tasmanian Division of the Property Council of Australia undertakes an annual review of available office floorspace in Hobart each January. Figures collated in January 2009 are outlined in Figure 26, Figure 27, and Table 20 below.

Figure 26. Total Office Floorspace (sqm), Hobart



Source: Property Council of Australia

Figure 27. Hobart Office Space Vacancy Rate



Source: Property Council of Australia

Table 20. Vacancy Rate and Net Absorption by Grade of Office Space, Hobart, 2008-9

Grade	Vacancy, Jan '09	Vacancy, Jan '08	Net Absorption, 12 months to Jan '09 (m2)	Net Absorption, 12 months to Jan '08 (m2)
A	3.5%	1.3%	-381	4,431
B	3.0%	3.2%	119	-1,329
C	1.9%	3.4%	1,126	-1,001
D	1.2%	1.5%	102	271
Total	**2.8%**	**2.2%**	**966**	**2,372**

Source: Property Council of Australia

The data indicates that the total quantity of office floor space has continued to rise over the 12 months to January 2009, with the additional 3,200sqm. This exceeded the 966sqm net absorption of office floorspace over the same period, resulting in an increase of the office floorspace vacancy rate from 2.2 to 2.8 percent. Nevertheless, Hobart's vacancy rate remained well below the average rate of 5 percent across the Australian CBD office market.

Analysis of office floorspace vacancy by grade of office space indicates that Grade A office space had the highest vacancy rate at January 2009 (3.5%), while Grade D office space had the lowest (1.2%). Grade A office space was the only grade of office space to have a negative net absorption rate over the 12 months to January 2009, decreasing by 381sqm and causing Grade A vacancy to rise 2.2%.

Some projects with significant office space planned or under development, all in the CBD, include:

- Nekon development Argyle Street;
- Office and retail, cnr Liverpool and Murray;
- Giameos development, Melville Street (development completed);
- Barrack Street/Redline redevelopment (being developed);
- RACT site redevelopment/expansion (expected to proceed);
- Argyle and Liverpool (Sultan Holdings) car park, retail and some office; and
- Parliamentary Precinct (early stages).

If all these projects proceed, the additional office area would be in excess of 40,000sqm, an increase of 12%. Given the recent global financial crisis some of these are now on hold. Clearly committed or built expansion is now about 11,000 sqm, with some others potentially proceeding. Under longer term average growth assumptions, that would represent less than 2 years worth of growth. With more recent growth rates, even this reduced amount could take up to ten years to absorb.

Forecasts of office floorspace provision by the Property Council indicate that an additional 11,995sqm will enter the Hobart office market in the 12 months to January 2010, with a further 1,790sqm confirmed to enter the market in the 12 months to January 2011. This is based on details of current and approved projects and expected completion dates. Depending on demand for the relevant grades of office space provision, this could potentially increase vacancy rates across the Hobart CBD.

5.4.1 Growth of Home-based Business Activity

There has been a recent growth and continuing trend for home-based businesses in Australia. Corporate downsizing, the greater premium placed on skills and knowledge, the ability of businesses to readily source inputs from remote suppliers and enhanced communications and information technology have provided opportunities for new and more flexible modes of working, and have given rise to the 'home-based business'. Micro and small businesses, especially new start-ups, are establishing in home offices and in low rent offices and shopfronts in the suburbs and in regional centres. People that establish companies in fields like design, marketing, software development, health and consultancy advice drive this activity.

The home-based business trend is also driven by societal changes including greater female participation in the workforce, balancing family life with careers, a re-emergence of thought in society about the importance of work-life balance, flexible working practices and employers' willingness to allow staff to work from home. More opportunities exist for sole operators to work from home on a contract basis, or for workers still attached to firms to 'hot-desk' or 'telecommute' with part of the time spent at an office in the central workplace location and part of the time at home or in another remote location. It is important that planning controls have the right balance of flexibility to allow and even encourage home based business, while also protecting the amenity of surrounding residents.

As home-based business activity continues to grow, there will be implications for commercial land requirements that will require creative responses from local Councils. For example, as home-based businesses grow, and as new staff are added, many firms will seek to move from the home office to a conventional office in their local area. Their move into the commercial office market may be a cautious step to relatively cheap accommodation until the business can sustain higher rents. Their target is therefore low-grade office space and residual shopfronts. In some places such space is not common so a strategy to encourage small office development could be pursued to accommodate this growing sector.

5.5 The Transit Oriented Development Concept

The concept of Transit Oriented Development (TOD) has gained widespread acceptance in recent years in mainland metropolitan centres and become a common theme in strategic planning policy. The concept of TOD is to maximise the use of high capacity and high frequency public transport services through appropriate land uses and density. This serves to support the use of public transport instead of widespread acceptance of private motor vehicle use. The benefits of such a policy include reduction in road congestion, reduced environmental impacts of motor vehicles, reduced travel distances, and improved public realm through less cars and parking areas.

It should be noted that TOD can take a variety of forms and mix of uses. The balance between the mix of uses is variable and will depend on the context, impact on activity centres, and quality of public transport. The focus of TOD could be a broad mix of residential, commercial and retail or could be focused more on one of those three uses that best serves the strategic planning for that centre and the activity centre network as a whole.

Greater Hobart is not serviced by trains or trams, only buses. There are three 'bus malls' one in the CBD, one in Rosny Park and one in Glenorchy. They are all the recipients of feeder routes and moderately well linked including by some express buses. There has been some discussion about using the rail line from the north for passenger rail to the CBD or conversion to a dedicated bus route when the transport hub in Brighton is complete. Given the current level of investment in public transport and the lack of any high frequency, high capacity public transport, TOD as being developed in mainland centres is not considered feasible at this time. However future TOD opportunities should be considered in any public transport planning and appropriate steps taken to preserve and pursue such opportunities. It appears that there are TOD opportunities in Glenorchy and Moonah. Kingston is another area which would benefit from high quality public transport infrastructure and appropriate land use to support such investment. While TOD opportunities are long term at best, this provides time for planning and preservation of land for such purposes. Furthermore, it is noted that more detailed studies are required to establish the best TOD opportunities.

5.6 Key Points and Implications

This Section has examined current and emerging retail and commercial trends and implications for the network of activity centres in the Southern Tasmania region.

There is a need to reinforce the role of existing centres compared with a range of dispersed retailing, and ensure that activity centres are well serviced by public transport. There is also an opportunity to capitalise on the distinct character of different centres in making them "stand out" and provide a enhanced shopping experience that cannot be replicated in other centres, (nor on-line for that matter).

It is acknowledged that some retailing will have large land requirements and cannot be readily located in centres. The demand for new types of retailing has led to more "out-of-centre" proposals and these need to be clearly identified, and strongly managed to maintain the integrity and advantages of the strategic network of activity centres. The Regional Land Use Framework should consider strong controls to ensure that "out-of-centre" proposals in a particular Council area do impact on the preferred network of activity centres. However centre development should allow for flexibility in the demand for a range of site areas, and allow for changing retail trends over time. Centre development should also recognise the importance of smaller centres to service local areas, niche needs, convenience, and potentially provide more sustainable access.

Given the strategic direction of strengthening and diversifying of the regional economy, centres should be planned to accommodate higher levels of commercial office space. This also provides benefits for centres, by diversifying the range of uses, encouraging supporting uses, and adding retail expenditure potential. However, as seen in Section 3.4 the employment profile of the region and the concentration of government related employment in the CBD is not conducive to major new employment in other activity centres. The clustering of businesses in the CBD has the greatest potential to build on the economic benefits of agglomeration. Given the relatively small size of the current CBD, it is especially important that this be given priority to provide the level of density, interaction, and activity that will bring related benefits and encourage further business location.

New office space should be encouraged in activity centres, but it is likely this may take the form of smaller mixed use developments, change in use for existing buildings, or niche office buildings. New office space should cater for the evolving economy including advanced business services, offices to support education, medical and research institutions, and back offices and regional offices of larger firms with main offices in the CBDs. It is also important that home based businesses be supported and provided with adequate in-centre office space that is affordable during the transitional phase from home business to traditional business. It is important to provide commercial office space for a range of tenants, business needs and phases of business growth.

It is also important also to recognise that the types of employment sectors and economic activities that are required to grow a knowledge based and creative economy, rely on workers who are lifestyle driven. Therefore, the urban environment needs to attract these "knowledge" workers through a high level of amenity, good urban infrastructure and services, an attractive and active public realm, access to entertainment, low maintenance housing, and natural attractions. The Southern Tasmania region has excellent environmental attributes and lifestyle attractions, however this needs to be matched by urban centres which are attractive and vibrant places to work and live, offering a full range of services, experiences and place based character. This relies in the first instance on a well thought out network of activity centres, and secondly through more detailed planning and urban design controls on a centre by centre basis.

6 Centres Assessment: A Current Situation Analysis

6.1 Overview of Centre Network

In the Southern Tasmania region Hobart and particularly the Hobart CBD is the main focus of both commercial and general retail activity. The region has historically grown around Hobart as the first and most significant urban centre. The Hobart CBD contains the bulk of jobs for the region, has higher order retailing, cultural facilities, government services, and the attraction of a waterfront location.

Over time, the city has grown outwards from the CBD in a manner constrained by the Derwent River and steep topography. Generally, growth spreading from the CBD has included;

- Northern development west of the Derwent River, and east of the Wellington Range (Moonah, Glenorchy, Claremont);
- Some development further to the north across the Derwent River at Bridgewater;
- Urbanisation to the east via the Tasman Bridge into Clarence LGA (restricted by the Meehan Range); and
- Southern development through Sandy Bay (in a relatively narrow strip adjacent to the Bay).

Kingston is now an established part of this growth although it is physically much more of an outlier. Although it is somewhat separated from Hobart it has a good road connection to Hobart via the Southern Outlet Road, however this single main connector route forces a car dominated transport solution with accompanying congestion issues. An improved public transport connection between Kingston and Hobart would assist Kingston in development in a more sustainable manner, with potential for transit oriented development.

Within the Hobart Metropolitan area a number of key centres have emerged as providing services to surrounding suburbs. These are predominantly Glenorchy to the north and Rosny Park to the east and more recently Kingston to the south. It is noted that Moonah and Glenorchy, along with Derwent Park form a more or less continuous commercial precinct along the Main Road. However Moonah and Glenorchy provide more diverse activity centres within this precinct and therefore are treated separately for the purpose of this study. These are supplemented by smaller centres such as Bridgewater, Moonah, Claremont, Shoreline, and Lindisfarne. Some of these lower order centres offer a range of employment and services, while others are limited to a predominantly convenience or weekly retail services role.

Further to the east from Rosny Park, Cambridge Park and potentially the Hobart International Airport have emerged recently as a focus for bulky goods retailing and commercial offices. This has significant implications and potential impacts on other centres, has been discussed in this report.

Outside of the Metropolitan area, towns such as Sorell, New Norfolk, and Huonville are important centres serving their districts. Because these centres, are significant distances from the CBD or other major centres they need to have a broad range of retailing, professional services, government services, and community facilities in order to meet the needs of their catchment areas.

6.2 Centres Detail

In this Section details of each centre are outlined in turn and at the end of this Section Table 21 provides details of each centre side by side for easy comparison. A number of centres, not specifically mentioned in the project brief, have been included which provide context of the surrounding development and next lower order of activity centres. These centres are shown in italics.

This Section contains a centre "snapshot" for each centre providing an overview of facilities and services, and employment information. This information has been used in comparing each centre and determining recommendations for a regional activity centre strategy. Catchment roles for the centres are given in broad terms of:

- Regional (serving multiple local government areas (LGAs) and potentially the whole Southern Tasmania Region as least for specific services);
- District (serving at least one LGA and potentially some adjoining LGAs; and
- Local (serving part of an LGA).

The following centre "snapshot" example provides an explanation of the detail for each centre.

Example Centre

Role:	The role that the centre plays in terms of function within the region.
Shops:	A description of the range of shops and retail facilities.
Employment:	Focus of employment and range of jobs
Community Infrastructure & Government Services:	The types of government and community services in the centre or with good accessibility from the centre.
Public Transport:	A description of the public transport services in the centre.
Opportunities:	A brief assessment of future opportunities for development.

Aerial View (Sourced from Google Earth)

Photographs or plans for the centre (from Council websites or State Government website)

Retail Floorspace:	Floorspace figures from current studies or data
Commercial Floorspace:	Floorspace figures from current studies or data
LGA Employment (self sufficiency):	Total employment from Journey to Work (JTW) data for whole LGA (LGA jobs divided by LGA employed persons)
Retail Emp.:	Retail Trade and Personal Services employment from JTW data for whole LGA
Commercial Emp.:	Communication Services, Finance and Business Services, and Property and Business Services employment from JTW data for whole LGA.
Govt. and Comm. Services Emp:	Govt. Admin. and Defence, Health and Community Services employment from JTW data for whole LGA.

Hobart City

Role: Hobart, and in particular, the Hobart CBD is the primary retail and employment centre for Southern Tasmania.

Shops: Hobart is Tasmania's primary shopping area with major retailers (Myer etc), entertainment services, food and hospitality, speciality stores etc. Hobart has the only Myer Store in the study area. Hobart CBD has a number of relatively small shopping centres, however the inner areas also has a strong level of street-front shopping. Centres include: Centrepoint Shopping Centre; Centro Cat and Fiddle; Elizabeth Plaza; and Trafalgar on Collins.

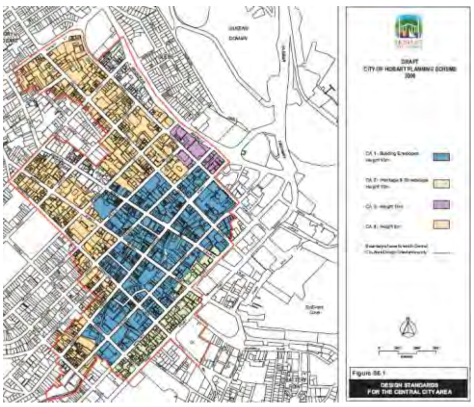
Employment: Both a significant retail and commercial employment hub (dominated by government tenants). Non retail employment is centred in offices (government, other), education (TAFE, Uni), health (Royal Hobart Hosp).

Community Infrastructure & Government Services: Hobart contains a broad range of social infrastructure, including Royal Hobart hospital, Menzies Centre, State and Commonwealth government agencies, Universities, TAFE convention centre, museums, aquatic centre, Salamanca Arts Centre, Tasmanian Museum and Art Gallery. Hobart CBD and fringe has the fastest optic fibre backbone in the State and one of the fastest in the country.

Public Transport: Buses service Hobart, connecting with surrounding centres. Bus Mall in CBD. There is a rail line linking Hobart and Bridgewater however this currently has no passenger service. Investigations into a possible heavy or light rail service, or dedicated bus corridor, have been undertaken but there are currently no plans to provide such services.

Opportunities: Establishment of more residential and tourist accommodation above ground level to increase activity outside of business hours.

Encouragement of active street frontages and pedestrian activity. This could be improved for large office buildings and institution buildings (e.g. hospital). Concentration of activities in the CBD provides potential to create economies of agglomeration and an attractive downtown “buzz”.



Retail Floorspace:	12,400sqm in Inner Hobart shopping centres (Property Council Australian Shopping Centre Database, 2010) plus floorspace in smaller independent shops. 28,941sqm in remainder Hobart shopping centres (includes 20,500sqm approx. for major bulky goods retailers).
Commercial Floorspace:	343,334sqm with 2.8% vacancy in CBD (Australian Office Market Reports, Jan 2009).
LGA Employment (self sufficiency):	44,708 (203%)
LGA Retail Emp.:	9,092
LGA Commercial Emp.:	9,018
LGA Govt. and Comm. Services Emp:	17,045

Rosny Park

Role: Centre serving Clarence LGA and beyond to the north east (Sorell) and south east (Tasman).

Shops: Over 100 stores in Eastlands major shopping centre anchored by Woolworths, Coles, Big W, Kmart, Best and Less (largest enclosed centre in Tasmania). Cinemas are located near Eastlands. Various smaller retail centres are located nearby.

Employment: Predominantly retail centre but surrounded by a range of small to medium scale commercial uses, plus library, and health care.

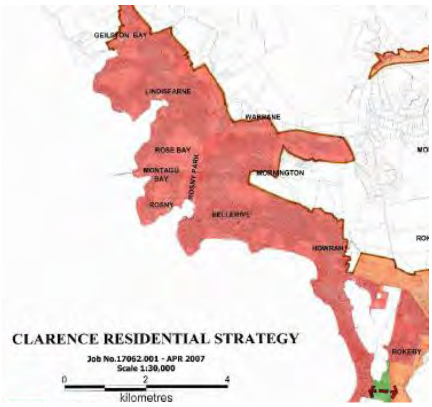
Community Infrastructure & Government Services: Commercial hub containing: Clarence City Council Chambers; Services Tasmania; Centrelink; Police headquarters; Housing services centre; Library; Health centre; Mineral Resources Tasmania etc. Clarence Sports Centre nearby.

Public Transport: Transit Mall for bus services is located adjacent to Eastlands Shopping Centre. Major bus routes service most of Clarence and link with Hobart. Strategic focus on establishing a stronger link between Rosny Park and tourism precinct at Kangaroo Bay and developing restaurant precinct at Bellerive Village.

Opportunities: Bus Transit Mall is not surrounded by active uses and does not appear to offer much attraction for patrons. Residential development should be encouraged to take advantage of available services, encourage street level activity and natural surveillance.

Intensification of land use; rationalisation of car parking (multi-storey); establishment of restaurant and entertainment activities; increased offices uses; expansion of variety of retail and services (City of Clarence Business Prospectus, 2008).

The future development of Kangaroo Bay as complementary and well connected precinct for tourisim, accommodation, and entertainment.



Retail Floorspace:	31,077sqm in Eastlands Shopping Centre (Property Council Australian Shopping Centre Database, 2010)
Commercial Floorspace:	Approx. 90,000sqm retail and commercial floorspace (Rosny Park car parking study, 2004)
LGA Employment (self sufficiency):	11,393 (55%)
LGA Retail Emp.:	3,779
LGA Commercial Emp.:	1,440
LGA Govt. and Comm. Services Emp:	2,331

Central Glenorchy

Role: Centre serving LGA and area beyond to the north.

Shops: Three standalone shopping centres form the core of the centre (with surrounding street front shopping). These include: Northgate Shopping Centre; Glenorchy Plaza; and Centro.

Retail services typical of big box shopping centres with major supermarkets, discount department store etc. Includes cinema complex.

Employment: Manufacturing and retail are the main employers.

Community Infrastructure & Government Services: Key infrastructure includes Council offices and administration; Post office (2,765 sqm); and health centre (2,170). There is a lack of integrated commercial development and civic and cultural services.

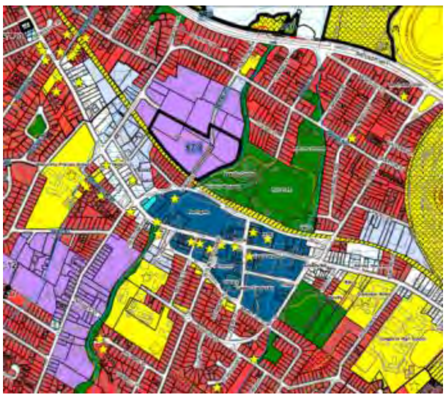
Public Transport: Serviced by key bus routes and good connections to the CBD.

Freight rail line has potential for conversion to passenger service (and was used as such until about the 1960s). The rail line varies from about 60 - 150 m from the main road near the Glenorchy CBD, however existing use of land has some constraints. The centre and surrounds is serviced by the Intercity Cycleway.

Opportunities: Redevelopment with better public space amenity and higher density uses including in-centre residential.

Freight rail line has potential for conversion to passenger service, which would provide better opportunities for access and potential for TOD at key sites.

Other opportunities include: through traffic diversion; Bus interchange; Town Square development; streetscape improvements (Council, 2008).



Retail Floorspace:	56,400sqm approx. (2006 Council data) 34,376sqm in shopping centres (Property Council Australian Shopping Centre Database, 2010)
Commercial Floorspace:	16,700sqm, of which approximately 13,500sqm was government offices (2006 Council data)
LGA Employment (self sufficiency):	17,469 (105%)
LGA Retail Emp.:	4,238
Commercial Emp.:	1,737
LGA Govt. and Comm. Services Emp:	2,506

SGS Economics & Planning

Claremont

Role:	*Local shopping centre*
Shops:	*Claremont Village and Convenience Centre are the two shopping centres in Claremont.* *District shops serving surrounding area include a supermarket, Chickenfeed discount store, assorted specialty shops and services.*
Employment:	*No particular employment focus. Retail centre only serving surrounding residential area.*
Community Infrastructure & Government Services:	*Post Office.*
Public Transport:	*Bus service connecting Claremont to Glenorchy.* *Freight rail line has potential for conversion to passenger service. Intercity Cycleway provides good access all the way south to Hobart CBD.*
Opportunities:	*Use of rail corridor for passenger services (rail or bus) would be a significant boost for the centre. This may be a long term opportunity for which suitable land would be required to be reserved.* *The shopping centre could be better complemented by a vibrant "high" street precinct.* *Other opportunities include consolidation of the village, development of medium density residential and improved pedestrian access within the centre.* *The centre has significant open space and potential for further varied development.*

Retail Floorspace:	*5,619sqm in Claremont Village* *(made up of 2,620sqm (Woolworths) + 2,999sqm (specialities)) (Property Council Australian Shopping Centre Database, 2010)*
Commercial Floorspace:	*No information available, however relatively minor.*
LGA Employment (self sufficiency):	*17,469 (105%)*
LGA Retail Emp.:	*4,238*
Commercial Emp.:	*1,737*
LGA Govt. and Comm. Services Emp:	*2,506*

Moonah

Role:	District level shopping below the wider scale role of Glenorchy Central
Shops:	District retail strip providing large range of smaller retail good and services - includes a number of bulky goods retailers, wholesale traders, and light/service industry. This is an area which has developed over time along a major transport route with a broad rang e of uses. Includes Woolworths. No major shopping centres.
Employment:	Fringe development involving a broad range of industrial and commercial uses as well as retail. A range of industrial uses are located nearby with heavier industrial uses to the north (presumably this was historically due to freight rail access).
Community Infrastructure & Government Services:	Moonah Arts Centre, with the Moonah and Clarence Sports Centre nearby.
Public Transport:	Moonah is on the major bus route connecting Glenorchy with Hobart. Freight rail line has potential for conversion to passenger service and in this location the redevelopment of industrial land offers significant opportunities.
Opportunities:	Low intensity uses or older uses provide opportunity for redevelopment, with gentrification spreading from a south a key driver. Opportunities for improved amenity, accessibility, and public realm focus. While rail is 250 m from Main Road, transit oriented development may make a lot of sense here as there is adjacent land that may be suitable for redevelopment (subject to more detailed studies). This centre has considerable opportunity for residential development with increased densities.

Retail Floorspace:	No information available.
Commercial Floorspace:	No information available.
LGA Employment (self sufficiency):	*17,469 (105%)*
LGA Retail Emp.:	4,238
Commercial Emp.:	1,737
LGA Govt. and Comm. Services Emp:	2,506

Shoreline

Role:	*District level centre with a convenience role and limited range.*
Shops:	*Woolworths, Chickenfeed, plus 22 speciality stores. Shoreline Shopping Centre is the sole shopping centre.*
Employment:	*District retail centre with little other supporting employment.*
Community Infrastructure & Government Services:	*Howrah Recreation Centre is located to the South of the centre. Shoreline Hotel is located adjacent to the centre.*
Public Transport:	*Bus services connecting to Rosny Park and from there to north Clarence and Hobart. Shoreline is a natural secondary hub where buses going to Rokeby/Lauderdale/South Arm and to Howrah/Tranmere all converge.*
Opportunities:	*Potential for centre expansion up, taking advantage of slope. Potential exists for more medium density housing in the area, with good access to the centre.*

Retail Floorspace:	*Shoreline Shopping Centre – 4,165sqm (Woolworths and Chicken Feed + speciality) (Property Council Australian Shopping Centre Database, 2010)*
Commercial Floorspace:	*Small number of 'local' commercial premises, real estate agents, lawyer, accountants, some in converted houses.*
LGA Employment (self sufficiency):	*11,393 (55%)*
LGA Retail Emp.:	*3,779*
LGA Commercial Emp.:	*1,440*
LGA Govt. and Comm. Services Emp:	*2,331*

Cambridge Park

Role:	*Specialist centre with a focus on bulky goods (homemaker) retailing and corporate offices.*
Shops:	*Forty Winks plus 39,000sqm Homemaker centre anchored by Harvey Norman and Mitre 10. Hobart International Airport DFO also located near Cambridge Park.*
Employment:	*Commercial and light industry based employment, along with a focus on bulky goods "homemaker" retailing.* *Recent commercial approvals include Aurora office and storage and Hydro Tasmania*
Community Infrastructure & Government Services:	*No significant services.*
Public Transport:	*Near Hobart International Airport (3.5 km), however is not serviced by public transport.*
Opportunities:	*Significant tracts of available land for future development, as well as the potential for synergies with airport activities. However very little surrounding residential use, which is predominantly rural residential. Details of the relative trading strength of the Cambridge Homemaker Centre were not available for this study and any such investigations were beyond the scope of this study. In general it is showing evidence of strengthening trade over time. This may be boosted by increased passing trade for the approved DFO at Hobart International Airport, and the continued focus on bulky goods retailing, anchored by key major tenants.*

Retail Floorspace:	*40,000sqm Homemaker centre (totally self contained)(Deep End Services in The Australian Financial Review, 27 Oct 2009)* *10,000sqm Direct Factory Outlet at Airport (proposed) (The Mercury, 17 Sept 2009)*
Commercial Floorspace:	*Approx. 65,500sqm*
LGA Employment (self sufficiency):	*11,393 (55%)*
LGA Retail Emp.:	*3,779*
LGA Commercial Emp.:	*1,440*
LGA Govt. and Comm. Services Emp:	*2,331*

Lindisfarne Shopping Village

Role:	Local convenience.
Shops:	Local shopping is available at the Woolworths in Franklin Street. No stand alone shopping centres of significant size.
Employment:	Local retail and services.
Community Infrastructure & Government Services:	Community and Child Health Centre; a range of sports facilities and Yacht Club nearby.
Public Transport:	Bus services to other areas of Clarence and Rosny Park.
Opportunities:	Opportunities exist to cement the role of Lindisfarne as a local community based centre, with a good diversity of uses. There are indications of a demographic shift toward households with greater spending power, and a growing population. The area is also attractive to families (as it was when established, mostly in the 1950's and 60's).

Retail Floorspace:	4,500sqm (SGS estimate from Lauderdale Shopping Centre Impact Assessment, July 2009)
Commercial Floorspace:	A limited variety of small scale offices only.
LGA Employment (self sufficiency):	11,393 (55%)
LGA Retail Emp.:	3,779
LGA Commercial Emp.:	1,440
LGA Govt. and Comm. Services Emp:	2,331

Kingston

Role: Regional shopping and the main centre for the south west.

Shops: Channel Court Shopping Centre (approx 20,00sqm) plus CBD street front shopping.

Kingston Town Shopping Centre - Woolworths (4,544sqm) + 2,723sqm specialities.

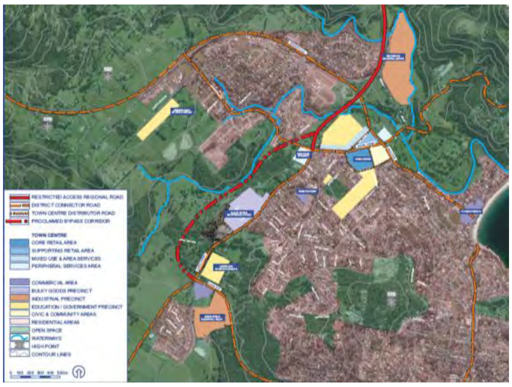
Employment: There is an employment focus on district level retail and services. The Antarctic Research Division nearby is also a significant employer.

Community Infrastructure & Government Services: A range of services are present including medical centres, community health centre, and a swimming pool.

Public Transport: Kingston is the primary focus for public transport facilities in the region. Car parking, road layout, street scaping and pedestrian access, however, have all been identified as issues.

Opportunities: The state government decision to relocate the Kingston High School has led to significant commercial and retail opportunities, with a Master Plan produced for the Town Centre. Relatively high population growth in the area will support centre development.

Community consultation on the Master Plan has identified key issues as: development of a vibrant town centre with a high amenity of community space; and upgrade of built environment to improve vehicle and pedestrian accessibility, convenience, and safety. These all present opportunities should they proceed.



Retail Floorspace:	27,000sqm in centres (Property Council Australian Shopping Centre Database, 2010) plus street front shopping. 20,000sqm estimate for Kingston Central (Kingston Central Area Master Plan, 2008)
Commercial Floorspace:	Approx 12,000 sqm of health, community and government floorspace (Kingston Central Area Master Plan, 2008).
LGA Employment (% of regional total):	6,726 (50%)
LGA Retail Emp.:	1,995
LGA Commercial Emp.:	941
LGA Govt. and Comm. Services Emp:	1,436

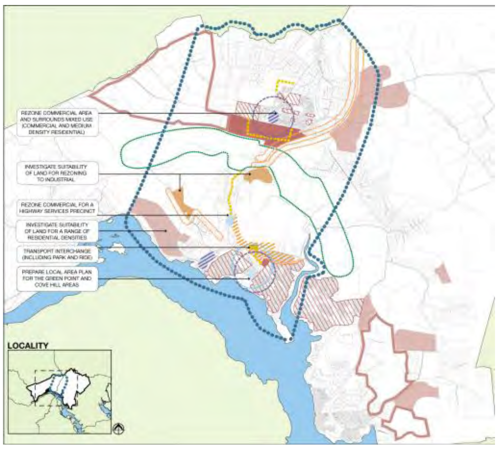
Sorell

Role:	District centre serving small community and rural surrounds.
Shops:	Sorell town centre, Sorell Shopping Centre - 5,362sqm anchored by Woolworths. A Coles supermarket was approved in 2008 and it is understood this is underway with the inclusion of speciality shops.
Employment:	Retailing, administration, community services and tourism.
Community Infrastructure & Government Services:	Limited information available.
Public Transport:	Need to improve transport infrastructure and linkages between business centre and residential areas, schools and the Orielton Lagoon.
Opportunities:	Stronger/ improved retailing, administration, and community services centre.

Retail Floorspace:	9,750sqm (Sorrel Township Urban Master Plan, Collie, 2009) including 5,362 sqm shopping centre (Property Council Australian Shopping Centre Database, 2010)
Commercial Floorspace:	Approximately 8,000sqm including property and business services, health welfare and community services, and civic art and municipal administration (Sorrel Township Urban Master Plan, Collie, 2009).
LGA Employment (% of regional total):	2,070 (43%)
LGA Retail Emp.:	617
LGA Commercial Emp.:	193
LGA Govt. and Comm. Services Emp:	349

Brighton

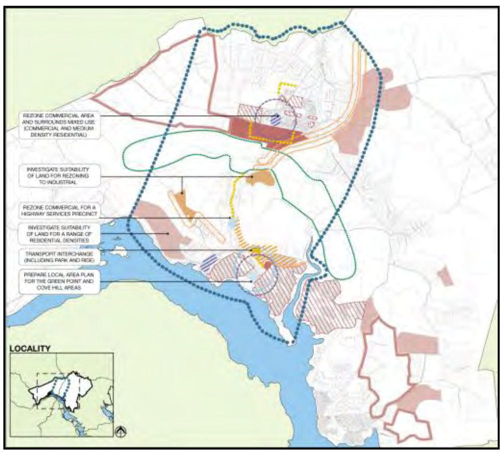
Role:	Town centre with local convenience function.
Shops:	Small supermarket; three petrol stations; and specialty stores. No major shopping centres.
Employment:	Little local employment. Horse training track is significant local employment focus. Industrial area to the south will provide additional employment upon completion of the planned Transport Hub.
Community Infrastructure & Government Services:	It appears that there are few services in Brighton, with the main focus for these being Bridgewater. Brighton does have a senior citizens centre.
Public Transport:	The area has a high car dependency with little public transport provision.
Opportunities:	The transport hub has the potential to provide significant jobs both directly and through associated retail and service uses. There are also significant opportunities for residential infill and a new town centre focus following construction of the Bypass.



Retail Floorspace:	No information available.
Commercial Floorspace:	Very little commercial floorspace.
LGA Employment (self sufficiency):	1,746 (36%)
LGA Retail Emp.:	458
LGA Commercial Emp.:	128
LGA Govt. and Comm. Services Emp:	331

Bridgewater

Role:	Bridgewater is the main centre for Brighton LGA.
Shops:	Cove Hill and Green Point (Coles and Woolworths respectively); one discount department store.
Employment:	Cove Hill precinct to north and Green Point in south are prominent employment areas.
Community Infrastructure & Government Services:	Housing Tasmania, Centrelink and a Library. There is a need for education and training, and youth facilities as there are currently no TAFE or University facilities. The State Secondary School only extends to Year 10.
Public Transport:	The area has a high car dependency with little public transport provision. A new public transport interchange is proposed under the current structure plan.
Opportunities:	Creation of a consolidated retail and services centre. Expansion of local employment opportunities, especially to service the proposed Transport Hub. The current structure plan recommends the promotion of Green Point as the main commercial/retail area with rezoning to commercial in a strip to the south (currently recreation). Relatively high residential growth though infill opportunities provide a driver for centre development.



Retail Floorspace:	5,371 in Covehill Shopping Centre (Property Council Australian Shopping Centre Database, 2010) plus strip retailing.
Commercial Floorspace:	Very little commercial floorspace.
LGA Employment (self sufficiency):	1,746 (36%)
LGA Retail Emp.:	458
LGA Commercial Emp.:	128
LGA Govt. and Community Services Emp:	331

New Norfolk

Role:	Services the local community, but also a focus for the surrounding rural area.
Shops:	Woolworths, Foodworks and IGA supermarkets; Mitre 10; Chicken Feed discount store; and a broad range of speciality shops. No major stand alone shopping centres.
Employment:	District services.
Community Infrastructure & Government Services:	Library, Australia Post, community health care centre, Council offices. Appears to be lacking local community and government services.
Public Transport:	Very limited - commuter service to Hobart and no local services.
Opportunities:	Build role as District service centre, diversify employment, and encourage tourist trade. Potential for role as a day trip destination for Hobart residents, however the level of local attractions needs to be improved to realise this potential.

Retail Floorspace:	No information available.
Commercial Floorspace:	A variety of small scale offices with professional services.
LGA Employment (self sufficiency):	2,150 (65%)
LGA Retail Emp.:	408
LGA Commercial Emp.:	167
LGA Govt. and Comm. Services Emp:	456

Huonville

Role:	Services the local community, but also a focus for the surrounding rural area.
Shops:	Local shopping and services for the town and surrounding districts plus tourist market - one major supermarket, two smaller supermarkets and Mitre 10. A small stand alone shopping centre.
Employment:	Agriculture, water based tourism and commercial employment.
Community Infrastructure & Government Services:	Australia Post, Centrelink, library, and Council offices.
Public Transport:	Commuter service only.
Opportunities:	Build on district service function and services to tourists and seasonal workers.

Retail Floorspace:	No information available.
Commercial Floorspace:	A variety of small scale offices with professional services
LGA Employment (self sufficiency):	3,643 (72%)
LGA Retail Emp.:	689
LGA Commercial Emp.:	249
LGA Govt. and Comm. Services Emp:	572

6.3 Centres Comparison

Table 21 provides a ready comparison of the activity centres reviewed. This table demonstrates that the dominant centres by size are Hobart, Rosny Park and Glenorchy (all at least 40,00sqm of retail and bus interchange malls). Rosny Park is the main centre for the Eastern sub-region, and Glenorchy does the same for the northern corridor. Kingston is close to these in scale and plays a similar role in servicing the south west. Catchments for the centres are given in broad terms of:

- Regional (serving multiple local government areas (LGAs) and potentially the whole Southern Tasmania Region as least for specific services);
- District (serving at least one LGA and potentially some adjoining LGAs; and
- Local (serving part of an LGA).

The remaining centres have similar retail facilities, although for those which are not focused around a shopping centre exact retail floorspace is difficult to ascertain. It is likely that the range of main street shops and supermarket at Moonah place it in a higher category. There are a number of centres which service outer areas, with little surrounding population. These include Huonville, Sorell, New Norfolk, while Brighton could also be placed in this category. Table 21 highlights centre issues and opportunities which are discussed in more detail in Section 9.

A number of centres, not specifically mentioned in the project brief, have been included which provide context of the surround development and next lower order of activity centres. These centres are shown in italics.

Sources for floorspace figures for the various centres are provided in Section 6.2 and are not repeated in the following table.

Table 21. Activity Centre Comparison

	Hobart City (Hobart)	Central Glenorchy (Glenorchy)	*Claremont (Glenorchy)*	Moonah (Glenorchy)	Kingston (Kingborough)
Catchment	Regional: Southern Tasmanian Region - 250,000 persons plus wider Tasmania	Regional: (generally low to moderate income).	*District: predominantly Local shopping centre with some District functions*	District	Regional
Public Transport	Bus Mall in CBD, with future potential for passenger use of rail corridor to the north (rail or bus).	Bus interchange services existing - link to CBD plus local services. Near rail corridor. Serviced by Intercity Cycleway	*Bus service connecting Claremont to Glenorchy.* *Freight rail line has potential for conversion to passenger service.*	On major bus route connecting Glenorchy with Hobart. Freight rail line has potential for conversion to passenger service.	Primary focus for public transport facilities. Carparking, road layout, streetscaping and pedestrian access all identified issues.
Community Infrastructure / Government Services	Broad range of higher order facilities and services, plus high quality broadband network.	Council offices and administration; Post office (2,765 sqm); health centre (2,170); lack of integrated commercial development and civic and cultural services.	*Post office*	Moonah Arts Centre Moonah and Clarence Sports Centre nearby	Estimated undersupply of 1,000 sqm at present. A range of services are present including medical centres, community health centre, swimming pool.
Retail Services	Hobart is Tasmania's primary shopping area with major retailers (Myer etc), entertainment services, food and hospitality, specialty stores etc. Hobart has the only Myer Store in the study area. Cinemas in Hobart CBD and North Hobart.	Services typical of big box shopping centres with major supermarkets; DDS etc. Includes cinema complex.	*Local and district shops serving surrounding residential area. Supermarket, Chickfeed discount store, assorted specialty shops and services.*	District retail strip providing large range of smaller retail goods and services - includes a number of bulky goods retailers, wholesale traders, and light/service industry. This is an area which has developed over time along a major transport route with a broad rang e of uses. Includes Woolworths.	Two shopping centres; DDS; and smaller specialty retailers.
Known Retail Floorspace	12,646sqm in Inner Hobart shopping centre (SCs) plus floorspace in independent shops 28,941sqm in Remainder Hobart SCs	56,400sqm approx. (2006 Council data) 34,376sqm in shopping centres	*Claremont Village total of 5,619sqm including 2,620sqm in Woolworths and 2,999sqm in specialties.*	Not available.	27,000 sqm in shopping centres. 20,000sqm estimated for Kingston Central.
Known Commercial Floorspace	343,334sqm with 2.8% vacancy in CBD (Jan 2009). This office floorspace is approximately half government tenants.	16,700sqm approx. - of which approximately 13,500sqm was government offices (2006 Council data)	No information available, however relatively minor.	No information available, however relatively minor.	Approx 12,000 sqm of health, community and government floorspace (i.e. retail and commercial). However dominated by retail use.
Strengths	Central location and main centre for higher order retailing, cultural facilities, employment, and services. High level amenity, and attraction for visitors and employees. Only Myer in the region. Commercial uses have the benefit of access to government, and close to Ministers offices. Main centre for office based employment.	Good concentration of retail, with good mix of uses nearby including residential, sporting/cultural facilities, offices and light industry. Near Hobart Showgrounds, and Elwick Racecourse. The area is very flat and therefore provides good accessibility, particularly for the elderly and disabled.	*Good retail and personal services for the local community. Good access to the centre via the Intercity Cycleway.* *Significant open space.*	Diversity of uses and employment in the centre. Mixed use character which has developed over time. Topography is flat, which provides good accessibility.	Strong district centre based on strong catchment growth (but not a compelling retail and town centre experience). The Channel Court redevelopment is an improvement.
Weaknesses	Relatively small CBD compared with other capital cities means less activity and less economic benefits of agglomeration. Currently Myer store is split between two locations. No supermarket at present (but two proposed). Topography is a constraint though not necessarily a weakness	Poor streetscape and pedestrian amenity. Lack of cultural and civic focus, and poor public realm.	*Relatively small centre with lack of diversity of employment or services, however this may be suitable given its catchment.*	Streetscaping issues and pedestrian amenity poor. Poor utilisation of land. Lack of cultural and civic focus, and poor public realm.	Several shopping centres and retail nodes with limited street front shopping outside of the 'centres'. Poorly connected, and rather pedestrian unfriendly. Recent redevelopment of Channel Court tries to be more 'mainstreet' and pedestrian friendly. Improvement but still not ideal.
Opportunities	Establishment of more residential and tourist accommodation above ground level to increase activity outside of business hours. Encouragement of active street frontages and pedestrian activity. This could be improved for large office buildings and institutional buildings (e.g. hospital).	May be opportunities to redevelop with better public space amenity and higher density uses including in-centre residential. Freight rail line has potential for conversion to passenger service, which would provide better opportunities for access and potential for TOD at key sites.	*Use of rail corridor for passenger services (rail or bus) would be a significant boost for the centre. This may be a long term opportunity where suitable land may be reserved now to facilitate complementary land use. The shopping centre could be better complemented by a vibrant "high" street precinct. The centre has significant open space and potential for further varied development.*	Low intensity uses or older uses provide opportunity for redevelopment with improved amenity. Moonah is at edge of a gentrifying front moving north. Retail has a strong street front orientation that reinforces relatively strong sense of community. While rail is 250 m from Main Road, transit oriented development may make a lot of sense here as there is adjacent land that may be suitable for redevelopment subject to more detailed studies. Generally there are opportunities for increased residential densities in and around the centre.	Strong growth supports centre development. State government decision to relocate the Kingston High School has led to significant commercial and retail opportunities.
Threats	The rise of shopping centres in surrounding areas threatens to erode the dominance of the CBD. Access by car and available car parking needs to be maintained to ensure the CBD is competitive as a retail destination. This is especially the case if mass public transport is not provided.	Somewhat fragmented format lacking strong focus and structure to attract people to linger (other than in the big shopping centres). Low income catchment makes it difficult to attract and sustain a full range of retail services. Strong growth at Brighton could draw some trade away.	*The role of this centre could fall back to a neighbourhood centre unless the catchment growth is enough to maintain its strength.*	Shift of industrial uses to larger, fringe sites may impact on the area in the short term, but provide opportunities for redevelopment.	The large level of forecast floorspace need must be carefully managed to ensure the desired Council and community outcomes are achieved.

SGS Economics & Planning

	Rosny Park (Clarence)	***Shoreline (Clarence)***	***Cambridge Park (Clarence)***	***Lindisfarne Shopping Village (Clarence)***
Catchment	Regional	*Local level centre with a convenience role and a limited range*	*Regional: specialising in bulky goods and homemaker type stores*	*Local*
Residential Use	Lower urban density residential surrounding, but there has been residential infill and scope for more.	*Mostly low density surrounding but some higher density to the south and scope for more*	***Very** little residential use in the immediate vicinity and **very** low density (mostly rural residential).*	*Low density residential*
Employment focus	Predominantly retail centre but surrounded by a range of small to medium scale commercial uses, plus library, and health care.	*District retail centre with little other supporting employment.*	*Commercial focus, light industry, focus for bulky goods retailing including "homemaker" sector and outdoors/sports goods/fitness stores.*	*Local retail and services*
Public Transport	Transit Mall for bus services is located adjacent to Eastlands Shopping Centre. Major bus routes service most of Clarence and link with Hobart.	*Bus services connecting to Rosny Park and from there to north Clarence and Hobart. Shoreline is a natural secondary hub where buses going to Rokeby/Lauderdale/South Arm and to Howrah/Tranmere all converge.*	*Near Hobart International Airport (3.5 km), but no public transport.*	*Bus services to other areas of Clarence and Rosny Park*
Community Infrastructure/ Government Services	Broad range of facilities and services in the centre and nearby.	*Howrah Recreation Centre located to the south. Shoreline Hotel adjacent.*	*No significant services*	*Community and Child Health Centre; a range of sports facilities and Yacht Club nearby.*
Retail Services	Over 100 stores in Eastlands major shopping centre anchored by Woolworths, Coles, Big W, Kmart, Best and Less. Eastlands is the biggest shopping centre in Tasmania. The centre includes cinemas. Relatively limited street front shopping outside of Eastlands.	*Woolworths, Chickenfeed, plus 22 specialty stores.*	*40,000sqm Homemaker centre anchored by Harvey Norman and Mitre 10* *DFO approved for Airport - 10,000sqm at this stage, but significantly more retail (73,000sqm) and commercial uses (up to 109,000sqm) are possible (but may not occur for some time)*	*Local Shopping - Woolworths in Franklin St*
Known Retail Floorspace	31,077sqm in Eastlands Shopping Centre	*Shoreline Shopping Centre – 4,165sqm (Woolworths and Chicken Feed + specialty)*	*39,000sqm Homemaker centre (totally self contained)* *10,000sqm Direct Factory Outlet at Airport (approved)*	*4,500sqm*
Known Commercial Floorspace	The Rosny Park car parking study from 2004 estimated a total commercial floorspace (retail, office etc) of 90,000sqm.	*Small number of 'local' commercial premises, real estate agents, lawyer, accountants, some in converted houses in surrounding area.*	*Approximately 65,000sqm of recent office development.*	*A limited variety of small scale offices only.*
Strengths	Strong retail centre with entertainment, and strong commercial area. Nearby community facilities. Good bus transport.	*Well functioning stand alone shopping centre serving local community. Very high RTD for the supermarket which has a large 'captive' catchment.*	*Ample supply of land for industry, commercial or retail uses, and recent development of Homemaker Centre and offices.* *Has good highway access and passing trade.*	*Local character and diversity.*
Weaknesses	Busy centre but not really exciting. Limited sense of 'centre' except bus mall which lacks interest. Internal parking areas are functional but bleak; available public open space is pretty much on the fringes of the area and not particularly attractive or well used.	*Does not include a range of employment or community uses. The site is constrained by area and slope making expansion more difficult.*	*Only accessible by car, with little surrounding residential development (and no significant residential growth areas designated in the area). The centre has a very narrow retail base, however its specialised role means that potential impacts on other centres are limited. Access on and off for westbound traffic is poor.*	*No obvious areas for expansion or redevelopment. Ageing population with declining average household size for some time; has been static or possibly declining catchment spending power.*
Opportunities	Bus Transit Mall is not surrounded by active uses and does not appear to offer much attraction for patrons. Intensification of land use; rationalisation of car parking (multi-storey), however this may have implication for the sustainability of current free car parking; establishment of restaurant and entertainment activities - (however this would be limited given focus on Bellerive Village (~800 m away) which has much more attraction); increased office uses; expansion of variety of retail and services. Residential uses in centre would provided benefits of activity and surveillance. The development of complementary uses at Kangaroo Bay are an opportunity provided good access is maintained.	*Centre could expand up, take advantage of slope.*	*Available land and synergies with airport activities. The centre is designed to provide specialised bulky goods retailing for the region.*	*Opportunities exist to cement the role of Lindisfarne as a local community based centre, with a good diversity of uses. First signs of turnover to new generation of family households with potentially greater population and spending power. Area is attractive to families (as it was when established, mostly in the 1950's and 60's).*
Threats	No obvious threats provided the attractions and amenity of Rosny Park are maintained as other centres may develop.	*At some time in the future there is likely to be a new shopping centre serving the designated growth areas around Rokeby/Clarendon Vale, Oakdowns. This would also catch much of the area beyond (Lauderdale. South Arm) This would cut the Shoreline catchment nearly in half.*	*This area threatens to take away from the retail strength of other areas (particularly bulky goods retailing). Large scale office development at Cambridge Park and the Airport have potential for significant impacts on the CBD office market. Access to this centre is restricted to car travel only. Well away (7-10 km) from nearest 'suburban' population areas (by Hobart standards). Heavily reliant on the presence of the current two anchors tenants for sustainability, but trade is understood to have improved steadily since opening.*	*No obvious threats, apart from potential new large scale retail proposals.*

	Sorell (Sorell)	Brighton (Brighton)	Bridgewater (Brighton)	New Norfolk (Derwent Valley)	Huonville (Huon Valley)
Catchment	District:serving small community and surrounds	Distict: Town centre for local government area but also with local function	District	District	District
Residential Use	Low density.	Low density residential with significant potential for infill.	Mixed commercial/ residential use.	Low density residential	Mixed commercial/ industrial and residential uses. Lack of affordable housing.
Employment focus	Retailing, administration, community services and tourism.	Little local employment. Horse training track is significant local employment focus. Industrial area to south where Transport Hub is planned.	Cove Hill precinct to north and Green Point in south are prominent employment areas.	District services	Agriculture, water based tourism and commercial employment.
Public Transport	Need to improve transport infrastructure and linkages between business centre and residential areas, schools and the Orielton Lagoon.	High car dependency. Limited public transport.	High car dependency. Limited public transport, with new interchange proposed in Structure Plan.	Very limited - commuter service to Hobart and no local services.	Commuter service only.
Community Infrastructure / Government Services	Limited information available	It appears that there are few services in Brighton, with the main focus for these being Bridgewater. Brighton does have a senior citizens centre.	Housing Tasmania, Centrelink, Library Need for education and training; youth facilities; - no TAFE or Uni and State Secondary only to year 10.	Library, Australia Post, community health care centre, council. Appears to be lacking local community and government services.	Australia Post, Centrelink, library, council
Retail Services	Ambitions to grow township as the regional retailing, administration, community services and community centre of the municipality	Small supermarket; three petrol stations; specialty stores.	Includes two supermarkets, a DDS, and a few stand alone shops.	Local shopping and services for the town and surrounding districts. Woolworths, Foodworks and IGA supermarkets; Mitre 10; Chicken Feed discount store; and a broad range of specialty shops.	Noted lack of accommodation for tourism and seasonal workers. Strong tourism retail focus. Local shopping and services for the town and surrounding districts plus tourist market - one major supermarket, two smaller supermarkets and Mitre 10. A small stand alone shopping centre.
Known Retail Floorspace	9,750sqm total shopfront floorspace including 5,362 sqm shopping centre A new Coles supermarket has been approved and development has commenced	No information available	Covehill Fair SC - 5,371sqm (4,128sqm Coles + Specialties) Green Point Woolworths 10,000 estimated total	No information available.	No information available
Known Commercial Floorspace	A variety of small scale offices with a total of approximately 8,000sqm including property and business services, health welfare and community services, and civic art and municipal administration.	Very little commercial floorspace.	Little commercial employment.	A variety of small scale offices with professional services.	A variety of small scale offices with professional services
Strengths	Local character and diversity	Forecast population growth and infrastructure projects in the area.	Significant retailing	Local character and diversity. Serves as main focus for Derwent Valley and Central Highlands residents but overall population is small, with modest overall growth rate.	Local character and diversity. Serves for main focus for residents of Huon Valley and South but overall population is modest with some growth.
Weaknesses	Lacks higher order retail services and limited community services	Lack of local retail and community services.	Shopping centres split between two nearby locations. Little commercial employment and diversity of employment.	Limits on local community and government services.	Lack of local community and government services.
Opportunities	Stronger retailing, administration, and community services centre.	Transport Hub has potential to provide significant jobs both directly and associated retail and service uses. Significant opportunities for residential infill.	Creation of a consolidated retail and services centre. Expansion of local employment opportunities, especially to service proposed Transport Hub. The current structure plan recommends the promotion of Green Point as the main commercial/retail area with rezoning to commercial in a strip to the south (currently recreation).	Build role as District service centre, diversify employment, and encourage tourist trade. Advertising strongly as a day trip destination for Hobart residents, however some way to go to achieve this.	Build on district service function and services to tourists and seasonal workers.
Threats	Development of out of centre retailing hubs either near Sorell or further south - e.g. Cambridge.	Bypass of current centre will likely impact on current retail services and may split the location of retailing.	Expansion of retail services elsewhere in inappropriate locations.	No obvious threats.	No obvious threats, apart from out of centre development.

7 Centre Principles

7.1 Principles for Activity Centre Functions

This SGS report has considered activity centres not just as providers of retail services, but as places of employment and living, with a key community role in providing social interaction and broader community services. Activity centres are not just dispensers of retail goods and services. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment activities, and places for living through new forms of higher density housing with good levels of amenity, in mixed land use settings. The approach of this report and the principles for activity centres has been based on this view.

This report is based on the recognition that activity centres play a wide range of functions well beyond commonly accepted retail and commercial functions (as detailed above). It should be recognised that the life of a community is largely expressed through its activity centres.

The familiarities which once characterised the relationship between traders and customers may have weakened under the pressures and effects of 'globalisation' and societal trends (e.g. mass merchandising, franchising, changing family structures, new technologies, changing government practices in service delivery, industry restructuring, changing work practices, evolving social values and the faster pace of life) but residents still identify strongly with (and value) their local activity centres.

Residents also value proximity to their larger regional centres, and the ranges of retail, services and community events focused on such centres. The 'liveability' and investment appeal of any place is still highly rated against its proximity or accessibility to multi-purpose activity centres. When activity centres are well-served by public transport (including pedestrian and bicycle networks) and located in proximity to other 'networked' activity centres which complement their role and function, they also contribute to greater environmental sustainability.

By providing identifiable locations for social, cultural and economic interaction and exchange, well planned activity centres display a strong 'sense of place' and provide a focus for community life and association. They are socially and culturally vibrant places that offer ongoing employment and business opportunities for the local community. They attract visitors and they encourage investment. Activity centres provide a distinct focus for tourist activity, including shopping, entertainment, services, and recreation. The network of activity centres is also an important factor in assisting visitors and locals navigate their way around the region, and identify with specific locations.

The relationship between residential areas and local employment opportunities, the accessibility of advanced business services to commercial and industrial enterprises and the levels of accessibility on major commuter and freight transportation routes will have a significant bearing on commercial connectivity and the 'cost of doing business' in any local economy. To this end, accessible, networked and multi-purpose in function with the appropriate scale of business, government and community services and facilities, Southern Tasmania's activity centres will contribute to regional prosperity.

The focus of this report is to consider activity centres as places of retail, community, and commercial use; and associated high density employment. Therefore, industrial areas as nodes of lower density employment and lower density land use are excluded from this strategy as they have distinctly different characteristics from activity centres. However employment outside of activity centres (i.e. including industry and manufacturing) is important to the economy of Southern Tasmania and it should be accommodated through appropriate strategic land use planning.

In summary, activity centres should be places that people enjoy visiting; where a range of goods and services are available; and where people are attracted to live and work. The attractions should lie in the:

- access to a range of goods, services and recreation;
- the quality of the urban form;
- local distinctiveness; and
- atmosphere and community feel.

This report considers that the desired outcomes for activity centres include the following, some of which will be applicable to varying extents depending on the centre role and function:

- a broad range of goods, and services suitable to the size of the catchment;
- entertainment, dining and leisure opportunities;
- vibrancy of the activity centre throughout the day and evening;
- a high level of social interaction supported by a suitable public open space;
- a strong contribution to the economy of the city through concentrations of retail and high density employment, business synergies, and concentration of ideas and knowledge;
- distinctive character based on the a sense of place and history;
- in-centre residential uses particularly in Primary and Principal Activity Centres and higher density in the walkable catchment; and
- a high proportion of visitors to the centre using public transport, walking or cycling.

These broad principles are consistent with desired centre attributes as identified in the Policy Review in Section 2 of this report.

The development of activity centres should also consider the efficient use of existing infrastructure. Existing activity centres should be generally well serviced and in turn residential growth around them (attracted by well functioning centres) will also be well serviced. The emergence of new centres, or out-of-centre development, has the capacity to weaken existing centres, encourage other development in undesirable locations, and increase the difficulty of maintaining a full range of services and infrastructure in existing centres or establishing them in new ones. A strong policy frame work should be drafted with the intention of encouraging development in existing centres and discouraging out-of-centre development.

It is acknowledged however that there may be centres (e.g. Cambridge Park) that perform a specific retail or employment role that do not necessarily have all the attributes of an activity centre as described above. Such concentrations of employment or specialised retailing **may, in some cases,** be justified outside of regular activity centres due to synergies of co-location or the lack of suitable locations in, or adjoining, activity centres. Section 8 of this report examines in further detail the need for a strong policy framework to manage out-of-centre development.

In reviewing current policy for the Southern Region it is clear that a wide variety of terms are used to describe the role, function, and scale of activity centres. In creating a regional framework SGS has used terms based on regional function. While it is considered that each activity centre has different features, and fills different roles, it is useful to group centres together by common characteristics. It is recommended that these should be applied by Council's when describing their networks of centres so that a consistent terminology and approach is adopted. Councils would need to supplement this terminology by descriptors for smaller centres not considered in this report.

The aim of this section is to provide some broad principles for the types of uses and level of services that should be in a Regional level activity centre (see Table 22). This can also indicate how centres of various scale or type should be developed to provide the desired range of outcomes.

Having considered the existing centres in the Southern Tasmanian region the following categories of activity centres are proposed (based on the South East Queensland Regional Plan terminology). Centres are listed under each based on current characteristics and preferred role. Although not examined in any detail in this study, it is important to note that below the regional level activity centres there are a range of 'neighbourhood centres' and 'local shopping strips'. These are important in providing services that are convenient and can provide more sustainable access. Some guidance on the role and functions of these centres has also been included to provide in order to inform the treatment of these centres by Councils as they take a consistent approach to the Regional Activity Centres.

Primary Activity Centre

- **Hobart CBD** (Dominant centre and will continue to play the role of a major employment centre; continued investment and development should build economies of agglomeration, and highest level of activity and services).

Principal Activity Centre

- **Central Glenorchy** (Principal centre for the north west urban area, currently the largest and most well defined centre);
- **Rosny Park** (Principal centre for the eastern urban area, the largest centre in that area, already having some diversity of employment);
- **Kingston** (Principal centre for the southern urban area, the largest centre in that area, with relatively strong growth forecast).

Major Activity Centre

- **Moonah** (Next largest centre in Glenorchy with a good diversity of land use in the vicinity, required to service large population in the area and supplementing the role of Central Glenorchy);
- **Bridgewater** (Required to service area of Brighton LGA just north of the Derwent River and catering for expected residential growth);

Rural Services Activity Centre

- **Huonville** (Currently the main centre for the outer south west area, required to serve a range of functions for the surrounding community but not catering for a large catchment);
- **Sorell** (Currently the main centre for the outer eastern area, required to serve a range of functions for the surrounding community but not catering for a large catchment);
- **New Norfolk** (Currently the main centre for the outer north west area, required to serve a range of functions for the surrounding community but not catering for a large catchment); and
- **Brighton** (Currently a small centre but catering for relatively high growth and located just north of the Brighton Transport Hub).

Specialist Centre

The preferred network of activity centres as outlined above provides a range of services to the surrounding community, and broader catchment in some cases. Typically these centres provide a range of retail services, community services, recreation, and in some cases office based employment, facilitating multi-purpose trips. As mentioned previously Cambridge Park is an exception to these types of activity centres as it provides a specialist bulky goods retail service only and a concentration of limited office based employment. It does not serve any significant residential catchment immediately surrounding and access is only via car. Therefore Cambridge Park should not develop as a multi-purpose activity centre, but should be recognised for its existing function as a significant bulky goods/ homemaker centre for the region. Standalone bulky goods centres should not be developed elsewhere in the short term. Bulky goods retailing should be in existing activity centres or on their fringes as the preferred outcome. Out-of-centre solutions should only be considered in exceptional circumstances which satisfactorily address the recommend out-of-centre policy as outlined in Section 8 of this report.

Therefore, on this basis Cambridge is not included in the categories above, but is recognised as a "Specialist Centre (Bulky Goods and Office)". No such other Specialist Centre currently exists, nor are any new ones needed in the short to medium term. The development of any such centres must to subject to the demonstration of overwhelming community need and benefit (see Section 8). The specific focus of any future additional Specialist Centres should be clearly articulated (e.g. "Bulky Goods and Office" for Cambridge Park).

- **Cambridge Park (Bulky Goods and Office)** (Recently designated development centre focusing on bulky goods retail only and office based employment, with a regional focus for bulky good retailing.

Specialist Centres are not considered a part of the network of regional Activity Centres, but rather complement the role of regional Activity Centres only as required as specific community need and benefit can be demonstrated (see Section 8). The character of Specialist Centres may vary significantly depending on their specific role and land uses, but some guidance is provided in Table 22, Recommended Regional Activity Centre Principals. Specialist Centres should generally have;

- Service for a regional catchment whether it be for education, specific employment, or specialised retailing;
- Additional retailing limited to that serving employment within the centre and not impacting on other centres (i.e. convenience retailing, cafes, takeaway food);
- Employment based on synergies with other land uses or industry, or large floorplate requirements that cannot be reasonably located in-centre; and
- No entertainment, community uses, or government services.

Arguably centres other than Cambridge Park could be considered within this category, but were not included in this study as they were not considered to play a regional role.

The following categories of centres are not considered to have a Regional role and function but are included here to provide guidance for councils in the treatment of these centres to complement the Regional network. It should be noted that there are often not clear distinctions between categories of centres and assignment to a particularly may not be clearly defined, however should be consistent across the Region.

Neighbourhood Centre

Neighbourhood centres are typically too small to be considered as part of the regional network of centres, but still play an important complementary role, servicing needs below the level of Major Activity Centres. They can however bring together a mix of uses similar to Regional activity centres (but at a much smaller scale). Neighbourhood centres may serve a number of suburbs down to a single suburb, and would typically have one or more large anchor tenants or an enclosed shopping centre. Neighbourhood Centres are either not suitably located or constrained and as such are not suitable to act as Major Centres. The principles in the next table provide councils with some guidance about their role and function. Examples of Neighbourhood centres are Claremont, Shoreline, New Town, Sandy Bay, Lindisfarne, Risdon Vale, and Blackmans Bay.

Local Shopping Strip

Local Shopping Strips operate at a very local level. They often offer varying and low rent levels, thereby providing opportunities to start up and small businesses. The principles in the next table provide councils with some guidance about their role and function. Examples of Local Shopping Strips are Lenah Valley, West Hobart, Lower Sandy Bay, and Howrah.

Table 22, below, sets out a recommended set of Principles for each of the categories of Regional activity centre outlined above. Table 23 provides guiding Principles for sub-regional activity centres.

Table 22. Recommended Regional Activity Centre Principles

	Primary Activity Centre	Principal Activity Centre	Major Activity Centre	Rural Services Centre	Specialist Centre
Catchment	Whole Southern Region particularly for higher order retailing and services.	Serves catchments of regional significance – LGA in which it is located and adjoining LGAs.	Compliments Principal Activity Centres, LGA wide catchment.	Serving outer, rural based LGAs.	Regional, mostly out-of-centre developments. Number of centres should be minimised and only allowed in case of significant public benefit, absence of adverse impacts on existing or planned centres and gains from synergies arising from co-location.
Employment	Provides a high concentration of employment and diversity of employment by sector. Primary location for offices including corporate headquarters, professional services, government administration. Also strongly attracts health care, education, hospitality and entertainment	Provides a focus for employment at the sub-regional level. Retailing will be a major focus but should be complemented by a range of office based employment. Office based employment may include some large employers, but will mostly be small to medium enterprises such as property, personal and professional services.	Provides a focus for employment at the LGA level, primarily in retailing, but complemented by a range of office based employment mainly in professional and personal services.	Includes a mix of retail and office based employment servicing the local area or having limited office space requirements. May include one or two larger employers which are not well served by an urban location.	Activities with extensive floor area requirements (e.g. bulky goods), generating externalities such as noise, smells, dust (e.g. nurseries, construction retail) and/or creating synergies by co-locating (e.g. research, education, health care).

	Primary Activity Centre	Principal Activity Centre	Major Activity Centre	Rural Services Centre	Specialist Centre
Retail	Regional shopping facilities - should include a department store, discount department stores, at least 2 major supermarkets, high level of speciality shops (particularly specialists drawing from the full Greater Hobart catchment), secondary retailing. Bulky goods retailing may be accommodated at the fringe.	Sub-Regional shopping facilities - should include at least 2 major supermarkets, good range of speciality shops and discount department store. May include bulky goods retailing.	Should offer at least 1 major supermarket, potentially a discount department store, a range of speciality shops, and secondary retailing.	Should offer 2 supermarkets, and a range of speciality shops. Most retail needs should be provided locally with only occasional trips required to other centres.	Retail should reflect the centre's purpose or defined character. Broader retail (take-away, cafes, etc) should be limited to serving the employment in the centre.
Commercial Office Space	The CBD will be the main location for government offices (services, administration, and political), but this will be complemented by a range of other office tenants including finance and insurance, and corporate offices.	Typically more than 10,000sqm of commercial office space, but may be significantly more depending on demand and the level of acceptable impact on the CBD.	Private sector providers of finance, banking, insurance, property services and professional services.	Local or district level commercial office space, serving the community.	Focussed clusters of employment affiliated with the centres predefined purpose or character in areas such as health, research and education.

	Primary Activity Centre	Principal Activity Centre	Major Activity Centre	Rural Services Centre	Specialist Centre
Public Transport	Provides a high quality public transport interchange facility that is served by a number of travel modes and links primary transit routes with local services. Ideally should provide a mass transit system (high capacity, high frequency).	Provides a major bus interchange with rapid links to other major centres and local services. Ideally links a number of public transport modes and connects directly or readily to other Principal Activity Centres.	High quality bus services linking other major centres and local services.	Ideally should have a local bus service and ideally connections to higher order centres, however this is expected to be difficult given low levels of patronage, and large distances involved.	Ideally, located at or adjacent to public transport corridor, between existing activity centres.
Government Services and Community Infrastructure	Regional facilities for the Tasmanian and Federal Govt, usually associated with administrative offices. Regionally significant educational facilities such as an urban University or TAFE campus should be located here. However low density education uses are not considered appropriate. Should offer a range of higher order health and cultural facilities (cultural centre, performing arts, central library), a city square of urban public space as the focus of community facilities	District facilities for the Tasmanian Govt (Service Tasmania) and Federal Govt (e.g. Centrelink). Should offer a range of health and cultural facilities (multi-purpose community centre, branch library), and an urban public space as the focus of community facilities and events.	Includes library facilities as a minimum and ideally incorporating community hall, (may also incorporate local government service centres). Also incorporates a town square of urban public space as the focus of community facilities and events.	District facilities for the Tasmanian and Federal Govt. Should offer a range of health and cultural facilities (community centre, branch library), and an urban public space as the focus of community facilities and events. Because of the distance from other centres, these centres should have a broad range of services and community infrastructure.	None, unless the predefined purpose or character details a specific need (e.g. public hospital).

	Primary Activity Centre	Principal Activity Centre	Major Activity Centre	Rural Services Centre	Specialist Centre
	and events, and a range of other high quality public spaces.				
Entertainment	Includes a broad range of dining and entertainment including night time activities, e.g. a cinema complex, restaurants, taverns/bars and clubs as well as hosting major cultural facilities (concert hall, theatres, museum).	Includes a range of dining and entertainment including night time activities, e.g. a cinema complex, restaurants, taverns/bars and service/sporting clubs.	Includes some night time activities focused on dining.	A hotel, local restaurant and dining facilities, and preferably with other entertainment and sporting facilities/clubs.	None.
Residential	Higher density residential development should be encouraged in-centre (both permanent and short term). Highest density focused around centre core areas, public open space and high frequency public transport facilities. This should be complemented by medium density in surrounding areas.	Medium density residential development should be encouraged in-centre. This should be complemented by redevelopment of surrounding low density residential at higher densities (subject to local planning studies).	Medium density residential development should be encouraged in and surrounding the centre. Should include a range of housing options including shop top housing and multi-unit development.	A range of residential choices should be provided including shop top housing, and multi-unit dwellings.	May have specialised accommodation nearby relating to the centre focus (e.g. student accommodation and units for nurses near and combined university/teaching hospital).

Table 23. Recommended Sub-Regional Activity Centre Principles

	Neighbourhood Centre	Local Strip
Catchment	Serves suburbs or a number of suburbs not served by regional level activity centres. Caters for more convenience type shopping trips, than Regional Centres.	Serves locality.
Employment	Includes a mix of retail, community and health services (such as a general practitioner, physiotherapist) with associated employment. Also includes office based employment servicing the local area and having limited office space requirements.	Mix of local retail and small scale offices.
Retail	Should offer one or more major supermarkets, potentially a discount department store, a range of speciality shops, and secondary retailing. Retailing offer will vary but will generally include a mix of convenience and range.	Strips often offer range of small specialty shops and a convenience store.
Commercial Office Space	Mostly small scale offices serving the local community, but may host other businesses that do not require particular proximity to other businesses or services.	Small office uses serving the local community. Possibly serving as a business incubator due to availability of varying and low rents
Public Transport	Ideally located at public transport corridor, and at least with good to adequate bus services. Should be highly accessible by cycling or walking from the surrounding area to enhance local access.	Ideally near public transport corridor. Should be highly accessible by cycling or walking from the surrounding area to enhance local access.
Government Services and Community Infrastructure	Local community services, and possibly a child care centre. May include some Council services, space for community groups, and public space.	Possibly community health services especially for residents with limited mobility.

	Neighbourhood Centre	Local Strip
Entertainment	May include some dining or a local bar and evening uses of these should be encouraged. However, these uses should not have an unreasonable impact on residential amenity.	May have dining in the evening or a local bar but these should be generally clustered together and residential amenity should be preserved.
Residential	Medium density residential development should be encouraged in and surrounding the centre. Shop top housing and mixed use development may be more suitable than larger scale residential development in-centre, as this would more readily maintain street level active frontages.	A range of residential choices should be provided including shop top housing, and multi-unit dwellings.

8 Managing Out-of-Centre Development

8.1 Rationale for Managing Out-of-Centre Development

Out-of-centre development is inconsistent with the intent of creating a strong and vibrant network of activity centres that are easily accessible and offer the advantages of a single multi-purpose trip.

Cambridge Park is an example of where out-of-centre development has been approved and highlights the need for careful consideration of such proposals to ensure sustainability of new and existing centres.

It is expected that with increased demand for retailing, and the growth of particular retailing sectors like bulky goods, the region will likely face continuing pressure from the development industry for retail and commercial development on standalone sites that are out-of-centre. If such sites are developed they could adversely impact upon the region's prospects of maintaining a compact and connected urban form in future. Such ad hoc development could also have a potentially detrimental impact on the economic performance of regions multi-purpose activity centres by diverting some investment, services and employment away from the activity centres to other out-of-centre locations. In the same way proposals for enlarging centres need to be controlled so that the role of each centre in the network is maintained to the benefit of the overall regional network.

In some circumstances, it may not be appropriate for certain developments to be located within designated centres. This includes, for example, large format retailing that is of an industrial nature and which can have adverse off-site impacts (such as noise from a timber yard, dust and smell from a nursery, etc.). It could also include some office locations which are more appropriate to locate near other employment nodes where the economic synergies of co-location are strongest. This could include, for example, the administrative, business incubation and commercial operations of an industry innovation centre (and its business tenants) which may be better located close to a University campus where there are active linkages between the two. It could also include specialist medical services businesses which can cluster near to or around major hospital sites. Such development should only be allowed where such synergies are obvious, and economic benefits can be realised. In such cases it is important to limit retailing and other activity centres uses so that these centres do not compete with the established activity centre network.

It also could apply to certain commercial or industrial uses which have stronger synergies with 'non-centre' employment locations such as ports or airports or where there is a demonstrated need for the out-of-centre activity which cannot be accommodated in an existing centre and which is not to the detriment of activity across the existing (and planned) network of centres. Such proposals need to be assessed by Councils on a case by case basis according to a consistent and strict set of planning principles which consider, among other things, the potential impact on existing activity centres. (Recommended criteria for assessing potential out-of-centre development are provided below).

8.2 Recommended Policy for Managing Out-of-Centre Development

In order provide an accessible and sustainable network of activity centres, planning and development in the Southern Tasmania region needs to be supported by strong planning controls which limit future out-of-centre retail and commercial / office development.

To this end, there are three basic tenets or underlying principles of the recommended policy regarding out-of-centre development. It is recommended that, for any out-of-centre proposals to be considered, all of the following three principles must be satisfied. They are:

1. **Community Need:** Out-of-centre development will only be considered if there is a quantifiable community demand / need for the commercial development out-of-centre. (This must be clearly demonstrated and justified).

2. **Impact:** Out-of-centre development will only be considered if it doesn't detract from / adversely impact upon investment and activity (including employment potential) in the regions existing and any future planned activity centres. Taking this a step further, the development should provide for business and employment growth which complements (rather than duplicates or competes with) the role and function of existing activity centres, contributing a net economic benefit to the region.

3. **Synergy:** Out-of centre development will only be considered if there are synergies to be gained from co-locating retail and/or commercial / office development with other land uses (such as health, education and research activities for example). It should build on existing concentrations and clusters of employment (primarily existing centres and specialist activity centres), should preferably locate on existing or proposed public transport networks and should complement the employment generating role and function of existing activity centres. However, development proposals of this nature cannot be supported if it is demonstrated that they would be to the detriment of existing employment nodes (as well as the region's other activity centres).

Further to these three underlying principles:

- For activities which, by their nature, cannot locate within centres (such as big box retailing), and for which (and only if) the three principles above have been satisfied, development at the edge of activity centres should be encouraged so that the objectives of a compact and connected urban form are encouraged throughout the region.

- Primary purpose retailing in industrial zones should not be permitted although large format retailing that is of a semi-industrial or industrial nature with negative off-site externalities (such as noise from timber cutting, smell from fertilizer or dust from soil, sand, cement, etc.) can locate in an industrial area provided they meet strict use criteria which should be included in local government planning schemes (i.e. approvals for retail uses in industrial areas should only be given for a specific retail use of the type outlined above).

- It should be recognised that home-based business activity is not considered to constitute out of centre development for the purposes of this study provided it meets limits on the extent of employees and opening hours. Home-based business activity, which does not detract from the amenity of the regions residential communities and which supports the growth of business and economic development in the region without detracting from the primacy of its activity centres, is encouraged.

8.3 Home Based Businesses

As noted in Section 5.4.1, there has generally been a recent growth and continuing trend for home-based businesses in Australia. As noted above home-based business activity is not considered to constitute out of centre development for the purposes of this study provided it meets limits on the extent of employees and opening hours. It is suggested that limits on home based businesses should be consistently applied across the region. Home-based businesses are an important, and can be a relatively high value, part of the economy in relation to their size and number of employees. Home based businesses allow low start up costs, fostering the establishment and early growth of new enterprises. Home based businesses support activity centres through required access for networking, meetings, and business services. A significant proportion of home based businesses would be expected to grow to small and medium sized enterprises which would establish in centres, again adding to the vitality and function of the centres. Cheaper office space within centres can play an important role in facilitating start up businesses, including those transitioning from home-based businesses.

8.4 Summary

It is important that a consistent approach be adopted both at a regional and LGA level to encourage investment in existing activity centres for the reasons outlined above. This should include a consistent policy statement and the inclusion of a framework for assessing any out-of-centre proposals.

9 Centres Opportunities

9.1 Primary Activity Centre

Hobart CBD

The growth of greater Hobart has led to the need for greater regional services and larger activity centres outside of Hobart City Council. However, it is also considered important that further development in the CBD be encouraged as this has specific economic benefits. Most importantly benefits emerge in cities where businesses can easily do business with other companies and employee productivity increases. As cities increase in size, the range of uses, services, and residential population, creates a synergy of activities that facilitate a vibrant and active centre. Added to this are the locational advantages of Hobart and the CBD in particular that has greater potential to attract knowledge based workers. The CBD offers a waterfront location, with a high level of amenity and premium facilities (sports, cultural, and social) that cannot be matched elsewhere in the region. Therefore there are a number of clear benefits with growth of the CBD, both in terms of current benefits, but also by increasing the inner city activity to further encourage economies of agglomeration and attract desirable business investment.

The city would benefit from more residential (permanent and short term) development above active retail street frontages, as this would assist in creating activity outside of business hours. The city should also have a full range of retailing including a supermarket (two are approved but not yet built). It is important that out-of-centre retailing or large proposals in other centres do not impact on the preferred network of centres including the role of the CBD. Large scale retail and commercial proposals may be necessary to service population and employment growth; however these should be located in centres that support the Regional network and activity centre Principles.

9.2 Principal Activity Centres

Central Glenorchy

Central Glenorchy is well positioned to offer good commercial and retail services to the whole north western area of Greater Hobart and the Southern Tasmania region. Glenorchy has a good level of retail services. However the centre has the potential to offer a much better level of service and amenity, making it a place to go other than for retailing. The centre should be more pedestrian friendly and provide a high quality public space focus, and other uses to encourage people to linger. The centre could have more office uses and the development of higher density residential uses would assist in supporting the centre and increasing the proportion of access by walking or cycling. There are long term opportunities associated with future use of the rail corridor for passenger services.

Rosny Park

Rosny Park is the largest centre outside of Hobart and has the largest enclosed shopping centre in Tasmania. The centre is busy but not "exciting" and lacks the ingredients to encourage people to linger beyond their need for retail services. The centre has a reasonable range of employment which has the potential to increase further.

The centre lacks integrated public open space and this is needed as a community asset and focal point. There are plans for better connection of Rosny Park with Kangaroo Bay and Bellerive Village which would complement the centre and expand its attraction. The Bus Transit Mall has the potential to be a much more active and interesting space.

Kingston

Kingston is the main centre to the south of Hobart. It has a strong retail centre and this will continue based on strong catchment growth. However, like the previous Principal Activity Centres, the centre lacks broad appeal, beyond retail services. The Channel Court development is an improvement, however the centre needs to be well connected and pedestrian friendly, with more street front appeal and a focus for the community. Significant opportunities exist with the redevelopment of the Kingston High School and Master Planning for this site. A well integrated, active and attractive bus interchange would assist the functioning and attraction of the centre.

9.3 Major Activity Centres

Moonah

Moonah is the second tier centre in Glenorchy and has a range of uses and diversity characteristic of a "main street" retail centre, however this also has resulted in amenity and pedestrian issues with growth of traffic on Main Road. Moonah is on the edge of a gentrifying front moving north and therefore has a driver for redevelopment and improvement. It has a strong past history for community cultural activities and some sport facilities. Retail has a strong street front orientation that reinforces the relatively strong sense of community. While rail is 250 m from Main Road, future transit oriented development may make a lot of sense here as there is adjacent industrial land that may be suitable for redevelopment. The centre would benefit from improved amenity through addressing streetscaping issues and generally improving the public realm.

Bridgewater

Bridgewater significant retailing, but lacks a strong centre identity and focus. The potential exists to promote a consolidate retail and services centre, which serves the potential for infill residential development. Current structure planning makes suggestions for the centre focus to be on Cove Hill with expansion of commercial use in a strip to the south. Like other centres above there needs to be an attraction for patrons to linger beyond their retail needs. Accessibility, pedestrian connection and quality public space should all be given high priority.

9.4 Rural Services Activity Centres

Huonville

Huonville has the attraction of local character and diversity. The main opportunities exist in ensuring the centre has the range of community and government services for the catchment population.

Sorell

Sorell also has the attraction of local character and diversity. Sorell LGA is forecast to experience modest growth relative to other centres, however the rate is quite high when considered in light of current population levels. Sorell appears to be developing well and is currently completing a town master plan, which is required to ensure growth and development occurs in a sustainable and desirable manner.

New Norfolk

New Norfolk seeks to develop its role as a District service centre, diversify employment, and encourage tourist trade, all of which are supported. New Norfolk is advertising strongly as a day trip destination for Hobart residents, however it needs to further develop its attractions to make the most of the opportunities presented by natural attractions and rural enterprises.

Brighton

Brighton has potential to develop significantly to serve new residential areas and respond positively to opportunities associated with the Brighton Bypass project and the Brighton Transport Hub. Rezoning of the current town centre provides opportunities for a well planned centre that responds to community needs.

9.5 Specialist Centre

Cambridge Park (Bulky Goods and Office)

Cambridge Park provides a niche retailing role focused on bulky goods including furniture, bedding, homewares, sporting goods, outdoor goods and fitness. This Homemaker Centre has brought together a range of bulky goods retailers in one location which offers some benefits for shoppers, although the location itself is not particularly central to the region. The centre should be limited to bulky goods relating and focus on this strength to cement its role. Some expansion of similar large format retailing in Cambridge Park may improve its sustainability and allow for more intensive retailing types in existing centres. The centre may also build on current office uses.

10 Findings and Recommendations

This section brings together the findings and implication of previous sections to make recommendations for STCA and Council action to support a well planned and well functioning network of regional activity centres.

10.1 Recommended Activity Centres Network

This report recommends the following network of activity centres as best placed to serve the Southern Tasmanian region.

Primary Activity Centre

- Hobart CBD

Principal Activity Centre

- Central Glenorchy
- Rosny Park
- Kingston

Major Activity Centre

- Moonah
- Bridgewater

Rural Services Activity Centre

- Huonville
- Sorell
- New Norfolk
- Brighton

Specialist Centre

- Cambridge Park (Bulky Goods and Office)

This report also recommends the principles for the network of activity centres from Section 7.1 of this report be adopted. It should be noted however, that centres of the same order may have slightly differing characteristics and functions which are complementary to other centres in the network. The aim of this study is to take a regional view of activity centres and how they function as a network at this level. Therefore it is important that whatever recommendations are adopted, are reflected in local government planning schemes. This may be done via voluntary co-operation, unless a stronger approach is taken through statutory measures. It is recommended that a statutory regional planning approach be adopted, however in doing this it is important that each of the relevant local government authorities have ownership of the decision making and implementation process.

Table 24 lists the recommendations of this review.

Table 24. Recommended Actions for Activity Centres Network

	Recommended Actions for Activity Centres Network	Priority	Responsibility	Related Action
Policy Area 1: Network and Development of Centres				
1.1	Adopt the recommended network of activity centres at the Regional Land Use Framework level (see previous Section). Considering the importance of activity centres to the economic, social and environmental sustainability of the city, a strong regional position should be clearly articulated. It is recommended that this report be used as the basis for a separate activity centres policy document to be adopted by the STCA.	High	STCA	1.2
1.2	Integrate the adopted centres network into local government policy (strategic plans, corporate plans, and planning schemes).	High	LGA	1.1
1.3	Integrate the centres planning principles presented in this review into regional planning policy and ensure this is reflected in local government planning schemes.	High	STCA and LGA	-
1.4	Local governments should undertake master planning for regional centres, taking into account information in this review, and review by the STCA. Such Master Plans should then be used to inform the development of Local Area Plans. This should include a detailed development capacity audit, public consultation, opportunities and constraints assessment, and economic development strategy along with addressing other activity centre principles. A prioritised program of master planning should be developed to ensure resources are allocated for maximum planning benefit.	Medium to High depending on development pressures and local issues	STCA and LGA	2.1 2.2 2.3 3.1 3.2 3.4 5.1-3
1.5	Continuing focus should be placed on the CBD to ensure it maintains its role as the primary centre for retailing, cultural and social activities, office based employment, and entertainment. This focus should extend beyond maintaining the current role to achieving at higher level of agglomeration of activities to bring greater benefits.	High	STCA and Hobart City Council	1.6 1.7 4.1-3

	Recommended Actions for Activity Centres Network	Priority	Responsibility	Related Action
1.6	Retail and commercial uses should generally be in existing activity centres and out-of-centre development should be carefully controlled (see below).	High	STCA and LGA	1.5 4.1-3
1.7	A detailed demand and supply analysis should be completed for the Southern Tasmania region, including employment forecasting (and floorspace demand), and retail demand modelling (broken up by various retail types and particularly including those that may be more appropriate out-of-centre). This would need to be supplemented by a detailed audit of current floorspace supply and development capacity. This would provide a good guide to the ability of current activity centres to cater for future growth and allow future supply to be allocated in the most efficient manner for the region. Such a proactive strategy would avoid activity centre decisions being led by pressures from retail developers.	High	STCA	1.5 1.6 4.1-3
Policy Area 2: Accessibility				
2.1	Use of the current rail corridor either for passenger rail services or a bus transit corridor should be pursued as this would provide a range of benefits for the region and activity centres along this corridor. In doing this planning should identify and preserve opportunities for TODs.	Medium	SCTA Hobart and Glenorchy Councils State Govt.	1.4 1.7 3.1
2.2	There is a need to improve accessibility to centres and adequate car parking will need to be addressed at an LGA level, however at the same time this needs to be balanced by efforts to increase more sustainable modes of access including public transport, walking and cycling.	High	SCTA and LGA	1.4
2.3	Accessibility should be enhanced through well defined centres with a clear centre, good layout, and good pedestrian movements. This should be addressed in the master planning process.	High	LGA	1.4
Policy Area 3: Housing				
3.1	High density housing in and around centres should be encouraged to provide a more sustainable development pattern, enhance the function of existing centres, and facilitate a higher rate of access via walking or cycling.	Medium	LGA	1.4 2.2
3.2	Planning scheme controls on height and residential density should be reviewed to ensure desired residential densities can be achieved (this should be part of the master planning process).	Medium	LGA	3.1

	Recommended Actions for Activity Centres Network	Priority	Responsibility	Related Action
3.3	A housing diversity and affordability strategy should be a part of all master planning, with recommendations for appropriate controls in a Local Area Plan (where appropriate).	Medium	LGA	1.4 2.2 3.1
Policy Area 4: Incorporate in-centre controls				
4.1	In-centre development only will be allowed and out-of-centre development will only be considered if all of the following criteria are adequately addressed: • community need; • no adverse impact on activity centres; and • synergy with existing employment hubs (i.e. health, education, research). If these three factors are present there must be overall community benefit demonstrated through a "social and economic impact assessment" to include elements as per this report and subject to third party review.	High	SCTA and LGA	1.1 1.6 2.2 5.1
4.2	Edge development to be preferred if in-centre development is not possible.	High	SCTA and LGA	1.1 1.5 2.2 5.1-2
4.3	Council should periodically review its planning scheme provisions in relation to home based businesses to ensure they are continuing to allow small businesses to establish and operate, while facilitating relocation into activity centres at an appropriate size and scale of operation	Medium-Low	LGA	1.6 5.2
Policy Area 5: Mix of uses				
5.1	Activity centres should have a broad range of community facilities and government services.	High	SCTA and LGA	1.3 1.4
5.2	Activity centres should encourage local employment, although in most cases this will consist of small scale businesses servicing the local or district areas.	Medium	LGA	1.4 1.6 4.3
5.3	Activity centres should encourage people to linger beyond that required for their retail needs. This should be done through: • a good quality public realm; • a particular public open space focus for community events and social networking; and • entertainment and dining.	High	LGA	1.3 1.4

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Southern Tasmania
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the 12 Southern Councils and the Sullivans Cove Waterfront Authority