



ESSENTIAL ECONOMICS

# **Brighton Council Structure Plan 2018**

## **Economic Assessment**

Prepared for

Brighton Council

by

Essential Economics Pty Ltd

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## INTRODUCTION

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The ***Brighton Council Structure Plan 2018*** is being prepared by Echelon Planning as lead consultant, together with Essential Economics who have undertaken the economics-related component of the Structure Plan.

Brighton Council are responsible for the strategic land-use planning within the Brighton municipality which is located on the northern side of the Derwent River in the broader Hobart region.

Council aim to facilitate economic development, enhance liveability, provide efficient infrastructure delivery and prevent land-use conflicts. The ***Brighton Structure Plan*** is the key document which is to guide this process. The last Brighton Structure Plan was completed in 2012 and the majority of the recommendations outlined in the 2012 Structure Plan have been implemented; it is now an opportune time to undertake this update.

This report provides input to the Structure Plan, which is being prepared by Echelon Planning, and specifically reviews and assesses the issues and opportunities associated with retail, commercial and industrial land within the Brighton municipality.

This report contains the following Chapters:

- 1 Regional Context
- 2 Economic Context
- 3 Retail and Commercial Assessment
- 4 Industrial Land Assessment
- 5 Key Findings and Recommendations.

As indicated above, the report is intended to provide input to the Structure Plan which is being prepared by Echelon Planning. Echelon Planning will be preparing a detailed planning review. This report takes into consideration a preliminary review of the 'key documents summary report' provided by Echelon Planning in January 2018. In addition, the research and analysis presented in this report also takes into consideration field work undertaken by Essential Economics in February 2018.

# 1 REGIONAL CONTEXT

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Brighton Council area is located on the north-western edge of the Hobart metropolitan area, approximately 17km from the Hobart CBD, as indicated in Figure 1.1. Access to the municipality – which is located on the northern banks of the Derwent River – is from the Brooker Highway from Hobart, crossing the Bridgewater Bridge across the Derwent River, or from the East Derwent Highway on the east bank of Hobart.

Brighton municipality is the northern gateway into Hobart, with the Midland Highway running through the centre of the municipality. This is the major road connection from Hobart to Launceston, providing a key north-south transport route across Tasmania, and this route carries the main flow of freight from the south.

The municipality contains the townships of Bridgewater, Brighton, Gagebrook and Old Beach, as well as the smaller village settlement of Pontville. Bridgewater is currently the municipality's centre for the majority of retail, commercial, and civic uses, with Brighton providing a smaller centre to the north.

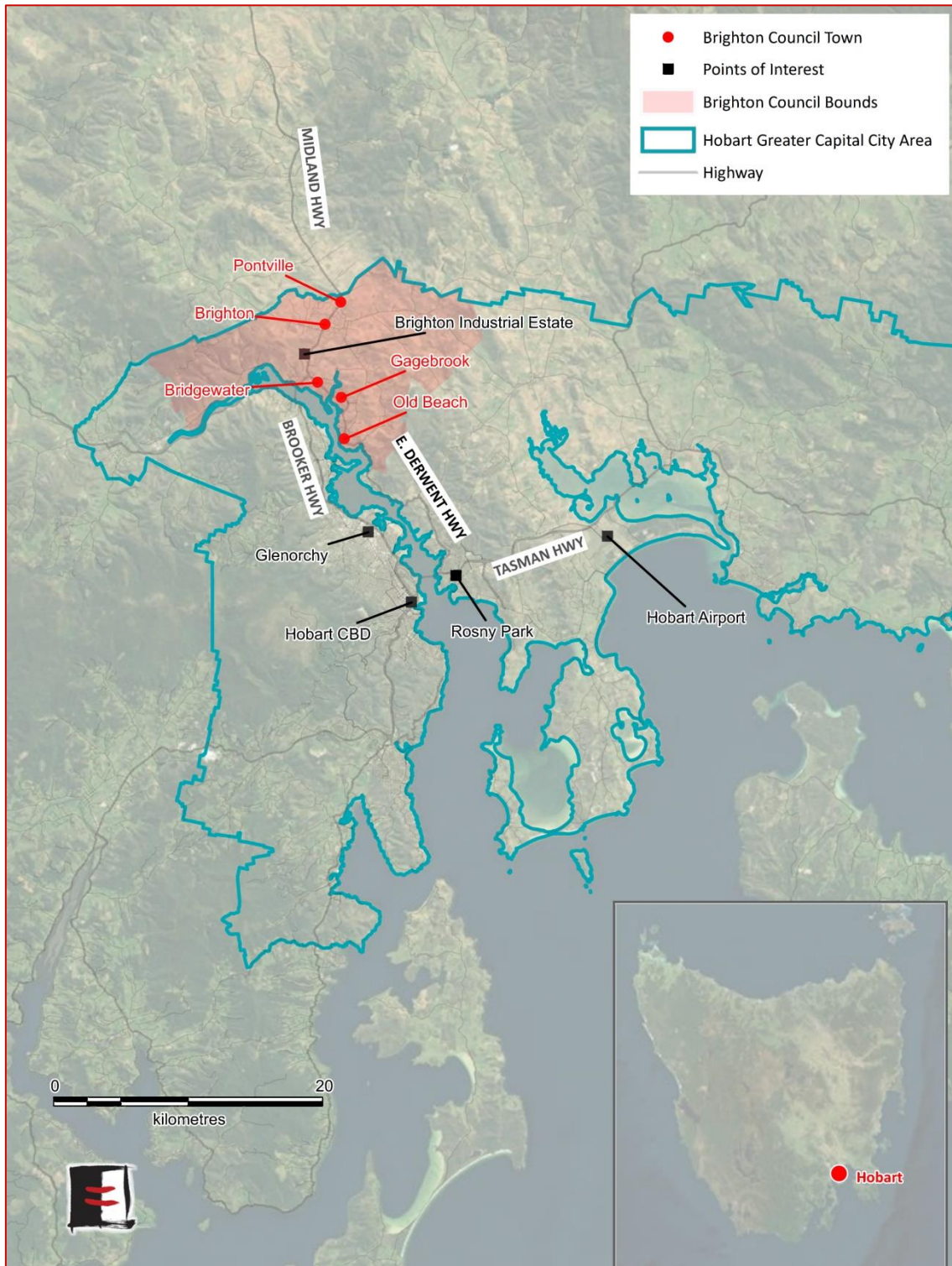
As limited retail and commercial services are available in the Brighton Council area, a significant portion of the municipality's population must travel beyond the municipality to the larger centres of Glenorchy (approximately 11km south) and Hobart CBD for a wider range of retail and commercial services, as well as employment opportunities.

In regard to the broader Activity Centre Network described in the *Southern Tasmania Regional Land Use Strategy* (2010-2035), Bridgewater is described as a 'Major Activity Centre', and Brighton is described as a 'Rural Service Centre'. The Hobart CBD, as the Primary Activity Centre, together with the 'Principal Activity Centres' in Rosny Park and Glenorchy, provide higher-order retail and commercial facilities and services.

A large industrial estate is also located within the Brighton Council area, known as the *Brighton Industrial Estate*. The estate covers a significant portion of land located between the townships of Bridgewater and Brighton, and includes the *Brighton Transport Hub*, an intermodal hub which covers road, rail and freight distribution. The *Southern Tasmanian Industrial Land Strategy* (SGS Economics and Planning, 2013) identifies the Brighton Transport Hub as being regionally significant.

Competing industrial estates within the Hobart region include the Derwent Park / Glenorchy Industrial Area to the south (approximately 11km), and the Cambridge Industrial Area located adjacent to Hobart International Airport (approximately 20km south east). In addition, the competing industrial area located at the northern end of the Midland Highway in southern Launceston (approximately 135km north) is also of relevance to the industrial sector in Brighton, particularly in regard to transport and logistics.

**Figure 1.1: Brighton Council Regional Context**



Prepared by Essential Economics with MapInfo, StreetPro and Bingmaps

## 2 ECONOMIC CONTEXT

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This Chapter provides an overview of the economic context within which the Brighton municipality is situated. Key implications for the Brighton Structure Plan arising from the analysis of the local economy are also provided.

### 2.1 Tasmania Economic Overview

The future of land use and development in the local Brighton economy is integrally linked to the state of the wider Tasmanian economy. A summary of selected key economic indicators for the financial year 2016/2017 for the state of Tasmania, sourced from the Tasmania Department of Treasury and Finance for Tasmania, is provided below:

- **Gross State Product (GSP)** increased by +1.1% between 2015/16 and 2016/17, which is below the average for Australia of +2.0%.
- **Gross State Product Per Capita**, considered a measure of productivity, increased by +0.5% over the past year compared to growth of +0.4% throughout Australia. Tasmania's GSP per capita in 2016/17 of \$55,060 was 21% below that of Australia (\$69,400).
- **Population** has increased at +0.6% from the previous financial year compared to Australian population growth of +1.6%. While below the national average, the population growth rate in Tasmania has increased consistently over the past five years.
- **Employment** increased by +2.9% compared to the national average of +2.4%.
- **Unemployment** in Tasmania is now 5.7% compared with the national average of 5.5%. The number of unemployed persons in the State has significantly decreased over the past year, declining by -6.4% to approximately 15,700 people.
- **Retail trade** value for the financial year was \$6.1b, an increase of +3.1% on the previous year. Australian retail trade value increased by +1.9% in the same period.
- **Non-residential building approvals** decreased in value to \$486m, a decline of -13.2%, compared to an increase in Australian non-residential building approvals of +17.5%.
- **Non-residential building activity work commenced** in the period also saw a decrease in value to \$499m, a decline of -48.2%, compared to growth for Australia of +9.2%.
- **Business investment** increased significant between the September quarter in 2016 to the September quarter in 2017 by 10.3%, compared to a decline in of 2.0% throughout Australia.

Growth in employment, retail trade, business investment and population, combined with declining unemployment, all contribute to a positive outlook for the Tasmania economy as a whole. However, the economy as measured by GSP is expanding at a rate below the balance of

Australia and therefore a need to continue to attract investment in non-residential building activity and to improve productivity is identified.

Brighton Council has an opportunity to contribute positively to the broader Tasmanian economy through providing attractive areas in which to live, work and invest in the municipality. This includes providing opportunities to invest in the municipality's activity centres and industrial area.

## 2.2 Study Regions

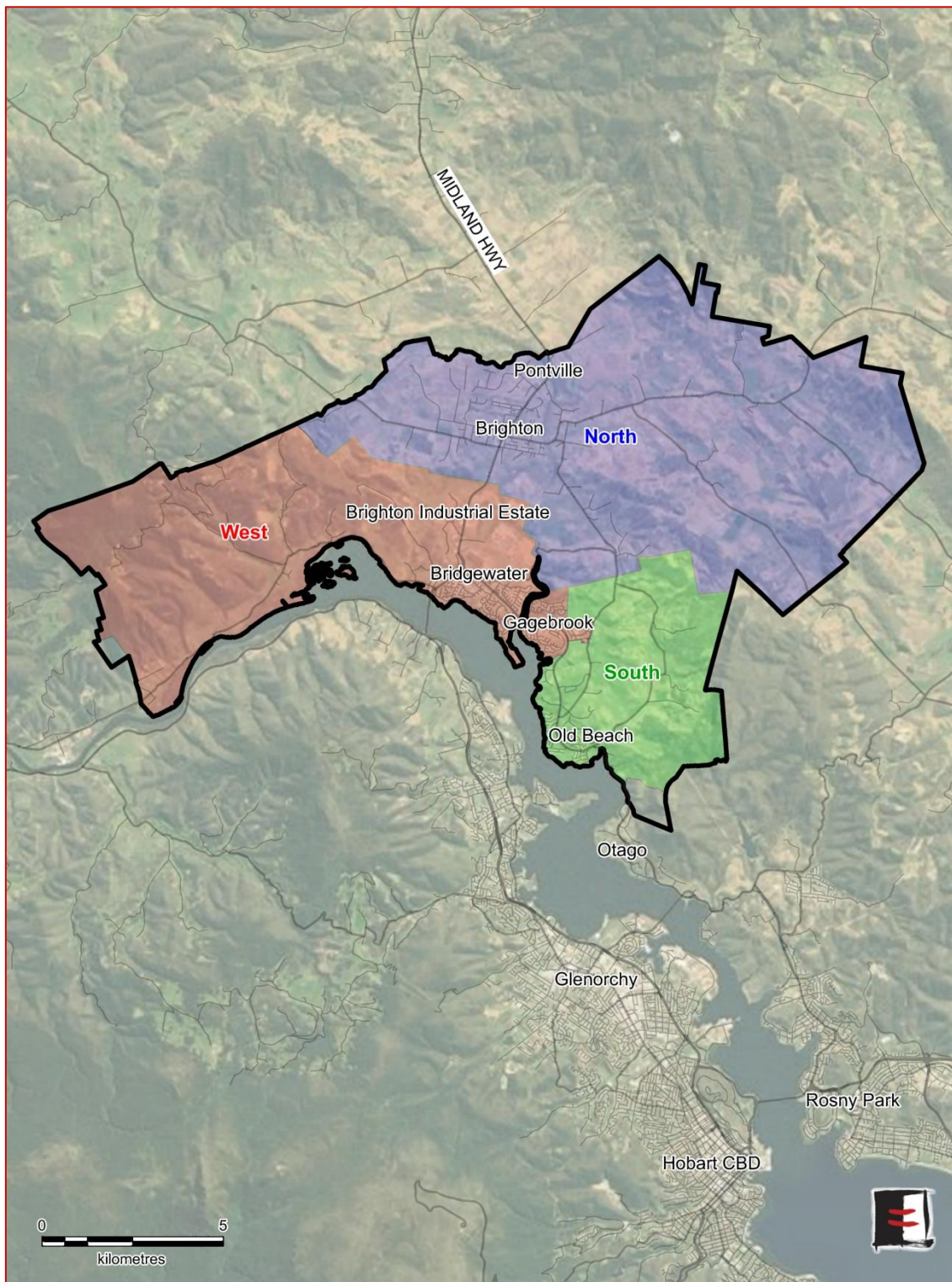
For the purpose of this study, three study regions have been defined based on existing Statistical Area 2 (SA2) boundaries within the Brighton Local Government Area (LGA). These areas are shown in Figure 2.1 and described below:

- **North region**, including the town of Brighton and the village of Pontville. The North region encompasses the entire area of the Brighton-Pontville SA2.
- **South region**, including the town of Old Beach and the adjacent St Ann's retirement village. This region includes the majority of the Old Beach-Otago SA2; however, it does not include the area of Otago located outside the LGA to the south of the region.
- **West region**, including the towns of Bridgewater and Gagebrook, and encompassing the entire area of the Bridgewater-Gagebrook SA2.

Two small areas within the LGA are located beyond the defined study regions, located to the west of the West region, and the south of the South region. These areas do not contain areas for urban development and have no population, therefore, excluding them has no impact on the analysis presented in this report.



Figure 2.1: Brighton Council Study Regions



Prepare by Essential Economics with MapInfo, StreetPro and BingMaps

## 2.3 Population Trends

Brighton Council is responsible for 12% of the population growth in Greater Hobart over the past 10 years, experiencing an average annual growth of 1.6% per annum between 2006 and 2016. This compares to 0.9% for Greater Hobart over the same period.

Both the North and South regions have experienced comparatively high rates of population growth, with the population in each region increasing by more than 100 persons per annum since 2006. This growth, equating to an average of +3.5% and +3.4% per annum respectively, is well above the Greater Hobart average annual growth of +0.9% per annum.

Population growth in the township of Brighton (approximately +110 persons per annum between 2006 and 2016) has been the primary location of growth in the North region, while the township of Old Beach (+84 persons per annum between 2006 and 2016) has been the main location of growth in the South region.

Variable growth changes have been observed in the West region since 2006, with the population declining slightly since 2011 at an average of approximately -60 persons per annum.

The population in the Brighton LGA is estimated at 16,610 persons in 2016. Table 2.1 summarises the recent trends in population by region.

**Table 2.1: Historic Population Trends, Brighton Council, 2006 to 2016 (No. Persons)**

Region	2006	2011	2016	AAG (No.), 2006-16	AAGR (%), 2006-16
North	3,880	4,840	5,450	+160	+3.5%
South	2,740	3,230	3,820	+110	+3.4%
West	7,610	7,620	7,340	-30	-0.4%
<b>Total Brighton LGA</b>	<b>14,230</b>	<b>15,690</b>	<b>16,610</b>	<b>+240</b>	<b>+1.6%</b>
<i>Greater Hobart</i>	<i>204,753</i>	<i>216,273</i>	<i>224,462</i>	<i>+1,970</i>	<i>+0.9%</i>

Source: ABS, Regional Population Growth, Cat No. 3218.0 (figures rounded)

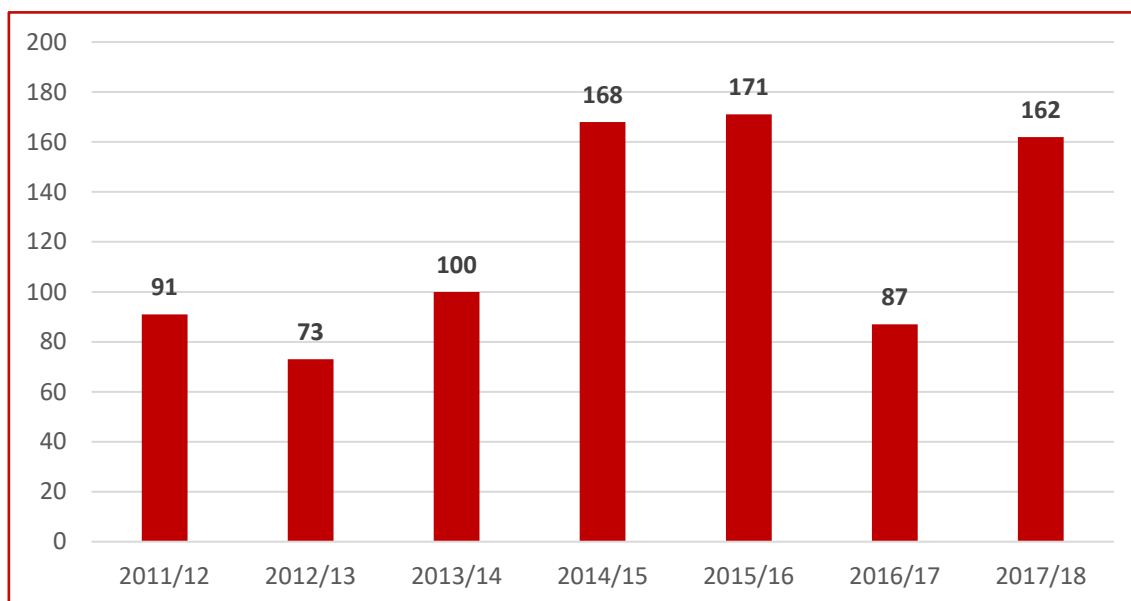
## 2.4 New Dwelling Building Approvals

The number of new dwelling approvals in a region can be a useful indicator of likely future housing development, and hence population growth. A large number of dwelling approvals indicates strong future demand for retail and commercial activities.

Brighton Council has experienced increasing numbers of new dwelling approvals since 2013, with the peak reached in 2016 as indicated in Figure 2.2. After a slow approvals year in 2017, with dwelling approvals at approximately half that of the year before, approvals are projected to increase again in 2018, with approvals for the first half of 2018 in the North and West regions already above those recorded for the full-period of 2017.

The majority of dwelling approvals have been granted in the North and South regions. However, since 2016 the number of dwelling approvals in the West region have increased, resulting in positive population growth forecast against historic decline, as seen in Section 2.5 of this report.

**Figure 2.2: No. of New Dwelling Approvals in Brighton Council, 2012 to 2018 (financial years)**



Source: ABS, Building Approvals, Cat No. 8731.0

Note: Figures year to June; Figures for 2018 are projected from year to date approvals until December 2017

## 2.5 Population Forecasts

Forecasts of population growth for each of the identified regions have been prepared, taking into consideration official Tasmanian State Government population projections, together with trends in dwelling approvals and historic population growth levels. The population forecast also takes into account areas identified for significant future growth, including housing estates and subdivisions, based on information provided by Council officers. Important residential subdivisions include the following:

- **North:** Brighton Army Camp development (approximately 250 additional lots); Dylan Street subdivision (estimated 140 lots);
- **South:** Tivoli Green development (estimated 600 lots); St Ann's retirement village development (approximately 80 additional lots); 1 Plymouth Road development (approximately 80 lots);
- **West:** Centacare Housing developments (approximately 400 lots).

Based on these inputs, strong population growth is forecast to continue in the North region, increasing from approximately 5,760 persons in 2018 to 8,630 persons in 2033, at an average rate of 2.7% per annum (or 190 persons per annum).

Strong population growth is also forecast for the South region, with population to increase significantly post-2022 as development of the 600-lot Tivoli Green housing development commences. Population in the South region is forecast to increase from approximately 4,060 persons in 2018 to 6,940 persons in 2033, at an average rate of 3.6% per annum (or 190 persons per annum).

Population decline in the West region is not forecast to continue, with the development of 400 dwellings by Centacare resulting in modest growth in this region.

Overall, population within the Brighton Council area is forecast to increase at an average of 2.0% per annum or above from 2018 onwards, with numbers forecast to increase from 17,280 persons in 2018 to 23,950 persons in 2033.

This projected growth is likely to be largely driven by new developments, such as the Centacare or Tivoli Green developments, as well as potential new infrastructure such as a possible additional school in Brighton. Based on information provided by Council, Centacare and Tivoli Green are proposed to account for approximately 1,000 new dwellings over the forecast period. Any economic slowdown that would result in these developments not proceeding is the main factor that would affect any variation to the population forecast shown in Table 2.2.

Based on the available information at present, the population forecasts presented in Table 2.2 represents a reasonable expectation of future population growth in the municipality.

**Table 2.2: Existing and Forecast Brighton Council Population, 2011 to 2033**

	2011	2016	2018	2023	2028	2033
<b><u>Population (No.)</u></b>						
North region	4,840	5,450	5,760	6,730	7,710	8,630
South region	3,230	3,820	4,060	4,840	5,940	6,940
West region	<u>7,620</u>	<u>7,340</u>	<u>7,460</u>	<u>7,860</u>	<u>8,180</u>	<u>8,380</u>
<b>Brighton LGA</b>	<b>15,690</b>	<b>16,610</b>	<b>17,280</b>	<b>19,430</b>	<b>21,830</b>	<b>23,950</b>
<b><u>Average Annual Growth (%)</u></b>						
North region		+2.4%	+2.8%	+3.2%	+2.8%	+2.3%
South region		+3.4%	+3.1%	+3.6%	+4.2%	+3.2%
West region		<u>-0.7%</u>	<u>+0.8%</u>	<u>+1.1%</u>	<u>+0.8%</u>	<u>+0.5%</u>
<b>Brighton LGA</b>		<b>+1.1%</b>	<b>+2.0%</b>	<b>+2.4%</b>	<b>+2.3%</b>	<b>+1.9%</b>
<b><u>Average Annual Growth (No.)</u></b>						
North region		+120	+160	+190	+200	+180
South region		+120	+120	+160	+220	+200
West region		<u>-60</u>	<u>+60</u>	<u>+80</u>	<u>+60</u>	<u>+40</u>
<b>Brighton LGA</b>		<b>+180</b>	<b>+340</b>	<b>+430</b>	<b>+470</b>	<b>+420</b>

Source: Essential Economics, ABS Estimated Residential Population, Tasmanian State Government

## 2.6 Socio-Economic Profile

An overview of selected socio-economic characteristics for each of the identified regions in the Brighton LGA is provided in Table 2.3.

A number of key differences exist between these socio-economic profiles, particularly for the population located within the West region. Key socio-economic factors for the West region include:

- **Lower incomes** which are significantly below incomes within the other regions and the Greater Hobart area.
- **Lower levels of education**, with only 29% of the population above 15 years old having completed year 12; the LGA average is 33%.
- **Younger age structure**, with over 54% of the population under 35 years of age, compared to the North and South regions where each has over 50% of their population 35 and over.
- **Lower levels of car ownership**, with over 15% of dwellings having no cars compared to the Greater Hobart average of 8%, and around 2% in the North and South regions.
- **High levels of public housing**, with almost 32% of dwellings rented from the state housing authority, with the North and South regions having no public housing (based on ABS 2016 Census data); the LGA average is around 14%.

Compared with the West region, the South region is characterised as having an older and wealthier population, with higher levels of education, higher levels of car ownership, and a higher number of homes owned either outright or with a mortgage. The socio-economic characteristics of the North region tend more towards this socio-economic profile of the South region, rather than that of the West region.



**Table 2.3: Brighton Council Socio-Economic Characteristics, 2016**

Category	North	South	West	LGA	Greater Hobart
<b><u>Income</u></b>					
Median household income (annual)	\$69,380	\$80,600	\$41,510	\$58,190	\$64,530
Var'n from Greater Hobart median	7.5%	24.9%	-35.7%	-9.8%	na
% of H'holds earning \$2,500pw or more	13.4%	17.3%	2.7%	9.8%	16.7%
<b><u>Age Structure</u></b>					
0-4 years	7.6%	7.1%	8.5%	7.9%	5.8%
5-19 years	20.9%	18.3%	26.2%	22.6%	18.3%
20-34 years	21.1%	18.6%	19.5%	19.8%	19.1%
35-64 years	38.2%	42.5%	34.5%	37.5%	38.9%
65-84 years	11.7%	11.7%	10.9%	11.3%	15.4%
85 years and over	0.6%	1.9%	0.4%	0.8%	2.4%
Median Age (years)	35.3	39.0	31.0	33.8	39.9
<b><u>Country of Birth</u></b>					
Australia	96.8%	92.8%	97.3%	96.1%	86.8%
% speak English only at home	98.8%	95.8%	98.8%	98.0%	91.9%
<b><u>Household Composition</u></b>					
Couple family with no children	27.5%	33.1%	16.5%	24.0%	26.8%
Couple family with children	36.9%	37.2%	24.9%	31.7%	27.0%
One parent family	13.4%	9.5%	27.6%	18.7%	12.4%
Other families	0.4%	0.2%	1.6%	0.9%	0.8%
Family Households - Total	78.1%	80.1%	70.6%	75.3%	67.1%
Lone person household	20.2%	18.1%	26.3%	22.4%	29.1%
Group Household	1.8%	1.8%	3.0%	2.3%	3.9%
<b><u>Dwelling Structure (Occupied Private Dwellings)</u></b>					
Separate house	84.9%	92.0%	92.2%	89.7%	85.2%
Semi-detached	0.8%	1.3%	2.2%	1.5%	6.0%
Flat, unit or apartment	14.3%	6.7%	5.5%	8.7%	8.5%
Average household size	2.7	2.6	2.6	2.6	2.4
<b><u>Tenure Type (Occupied Private Dwellings)</u></b>					
Owned outright	26.3%	30.0%	17.9%	23.5%	33.8%
Owned with a mortgage	53.8%	56.5%	26.0%	42.3%	36.1%
Rented	19.6%	13.2%	55.9%	33.9%	29.4%
State or territory housing authority	0.0%	0.0%	31.6%	13.8%	5.3%
<b><u>Housing Costs</u></b>					
Median monthly mortgage repayment	\$1,380	\$1,510	\$1,020	\$1,310	\$1,410
Var'n from Greater Hobart median	-2.1%	7.1%	-27.7%	-7.1%	0.0%
Median weekly rents	\$280	\$320	\$200	\$220	\$260
Var'n from Greater Hobart median	7.7%	23.1%	-23.1%	-15.4%	0.0%
<b><u>Car Ownership per Dwelling</u></b>					
None	2.4%	1.6%	15.8%	8.0%	8.3%
One	28.0%	25.9%	39.1%	32.3%	37.8%
Two	36.6%	42.9%	28.8%	34.8%	35.9%
Three or more	33.0%	29.5%	16.3%	25.0%	18.0%
<b><u>Highest Year of School Completed (% of population aged 15 years and over)</u></b>					
Year 12 or equivalent	30.4%	43.6%	28.8%	33.1%	52.5%
Year 9-11 or equivalent	65.1%	53.6%	64.2%	61.8%	43.0%
Year 8 or below	4.2%	2.6%	6.5%	4.7%	4.1%

Source: ABS, Census of Population and Housing, 2016

## 2.7 Employment and Labour Force Trends

### *Job Growth Trends*

The number of jobs located in the Brighton Council area has consistently increased since 2006, with 2,830 jobs located in the Council area in 2016 compared with 1,760 jobs in 2006. This trend is shown in Table 2.4.

**Table 2.4: Jobs by Industry in Brighton Council, 2006 to 2016**

Industry	2006		2011		2016	
	Jobs	Share	Jobs	Share	Jobs	Share
<b><u>Typically Located in Activity Centres</u></b>						
Retail Trade	200	11.4%	230	9.9%	290	10.2%
Accommodation and Food Services	120	6.8%	150	6.5%	210	7.4%
Financial and Insurance Services	10	0.6%	0	0.0%	10	0.4%
Rental, Hiring and Real Estate Services	20	1.1%	30	1.3%	10	0.4%
Professional, Scientific and Technical Services	20	1.1%	40	1.7%	60	2.1%
Public Administration and Safety	140	8.0%	140	6.0%	140	4.9%
Health Care and Social Assistance	180	10.2%	210	9.1%	290	10.2%
Arts and Recreation Services	<u>40</u>	<u>2.3%</u>	<u>50</u>	<u>2.2%</u>	<u>70</u>	<u>2.5%</u>
<b>Sub-total</b>	<b>730</b>	<b>41.5%</b>	<b>850</b>	<b>36.6%</b>	<b>1,080</b>	<b>38.2%</b>
<b><u>Typically Located in Industrial Areas</u></b>						
Manufacturing	110	6.3%	180	7.8%	140	4.9%
Construction	160	9.1%	260	11.2%	310	11.0%
Wholesale Trade	80	4.5%	130	5.6%	90	3.2%
Transport, Postal and Warehousing	<u>170</u>	<u>9.7%</u>	<u>270</u>	<u>11.6%</u>	<u>440</u>	<u>15.5%</u>
<b>Sub-total</b>	<b>520</b>	<b>29.5%</b>	<b>840</b>	<b>36.2%</b>	<b>980</b>	<b>34.6%</b>
<b><u>Other Industries</u></b>						
Agriculture, Forestry and Fishing	60	3.4%	60	2.6%	70	2.5%
Mining	10	0.6%	10	0.4%	10	0.4%
Electricity, Gas, Water and Waste Services	0	0.0%	20	0.9%	20	0.7%
Information Media and Telecommunications	10	0.6%	10	0.4%	10	0.4%
Administrative and Support Services	50	2.8%	60	2.6%	100	3.5%
Education and Training	290	16.5%	330	14.2%	340	12.0%
Other Services	70	4.0%	110	4.7%	130	4.6%
<b>Sub-total</b>	<b>490</b>	<b>29.0%</b>	<b>600</b>	<b>27.2%</b>	<b>680</b>	<b>27.2%</b>
Inadequately described	20	1.1%	30	1.3%	60	2.1%
Not stated	0	0.0%	0	0.0%	30	1.1%
<b>Total</b>	<b>1,760</b>	<b>100.0%</b>	<b>2,320</b>	<b>100.0%</b>	<b>2,830</b>	<b>100.0%</b>

Source: ABS Census of Population and Housing 2006, 2011, and 2016

Note: Figures rounded

Industries experiencing the highest growth in jobs include Retail trade, Accommodation and food services, Health care and social assistance, Construction, and Transport, postal and warehousing. All of these industries experienced growth of +50 jobs or more in the period between 2011 and 2016.

Overall, significant growth in the Brighton Council area occurred in Transport, postal and warehousing based jobs, and to a lesser extent Construction. This is likely due in part to the launch of the Brighton Transport Hub in 2014.

ABS Census data indicates that approximately 50% of jobs located in Brighton Council are held by residents of the Council area, with 6% of the jobs filled by residents of Claremont, 5% by residents from New Norfolk, and 4% by residents from Austins Ferry and Granton. The balance of jobs are filled by residents located across the Greater Hobart region.

### ***Labour Force Trends***

Compared to the types of jobs located in the Brighton Council area (as described above), a high share of employed Brighton Council residents work in industries which are typically located in activity centres. These industries employ over 50% of employed residents in 2016. A comparison of the number of jobs (refer Table 2.4) and the employed labour force (refer Table 2.5) shows that the Brighton Council area provides approximately one job for every three persons employed in industries which typically locate in activity centres.

Brighton Council has historically experienced high rates of growth in the number of residents employed in the Retail sector; however, this has slowed in the past five years. Growth in this period has instead been recorded in the number of persons working in Health care and social assistance, and to a lesser extent in Accommodation and food services, with the number of persons employed in these areas increasing at an average of 48 and 16 persons per annum, respectively.

Meanwhile, the percentage of those employed in Brighton Council working in traditional industrial sectors (i.e. Manufacturing, Warehousing and Transport and logistics) has significantly declined, falling by approximately 7 percentage points since the 2011 ABS Census. This decline has been driven by a reduction in the number of persons working in Manufacturing (a decline of approximately 20 persons per annum for the past 10 years), and more recently by a similar decline in those working in Wholesale trade. The overall decline in this sector has occurred despite the number of persons employed in the Construction sector having increased significantly.

Further to the above, consistent growth has occurred in the number of Brighton Council residents who are working in the Education and training sector.

Table 2.5 summarises the recent trends in the Brighton Council resident labour force by industry.



**Table 2.5: Brighton Council Resident Labour Force by Industry, 2006 to 2016**

Industry	2006		2011		2016	
	No.	Share	No.	Share	No.	Share
<b><u>Typically Located in Activity Centres</u></b>						
Retail Trade	710	13.7%	850	14.0%	890	13.4%
Accommodation and Food Services	360	6.9%	370	6.1%	450	6.8%
Financial and Insurance Services	100	1.9%	110	1.8%	130	2.0%
Rental, Hiring and Real Estate Services	70	1.3%	100	1.7%	90	1.4%
Professional, Scientific and Technical Services	130	2.5%	170	2.8%	170	2.6%
Public Administration and Safety	450	8.7%	540	8.9%	530	8.0%
Health Care and Social Assistance	570	11.0%	690	11.4%	930	14.0%
<u>Arts and Recreation Services</u>	<u>70</u>	<u>1.3%</u>	<u>110</u>	<u>1.8%</u>	<u>130</u>	<u>2.0%</u>
<b>Sub-total</b>	<b>2,460</b>	<b>47.3%</b>	<b>2,940</b>	<b>48.6%</b>	<b>3,320</b>	<b>50.1%</b>
<b><u>Typically Located in Industrial Areas</u></b>						
Manufacturing	710	13.7%	590	9.8%	500	7.5%
Construction	460	8.8%	580	9.6%	690	10.4%
Wholesale Trade	210	4.0%	230	3.8%	150	2.3%
<u>Transport, Postal and Warehousing</u>	<u>310</u>	<u>6.0%</u>	<u>350</u>	<u>5.8%</u>	<u>360</u>	<u>5.4%</u>
<b>Sub-total</b>	<b>1,690</b>	<b>32.5%</b>	<b>1,750</b>	<b>28.9%</b>	<b>1,700</b>	<b>25.6%</b>
<b><u>Other Industries</u></b>						
Agriculture, Forestry and Fishing	90	1.7%	80	1.3%	120	1.8%
Mining	10	0.2%	20	0.3%	30	0.5%
Electricity, Gas, Water and Waste Services	90	1.7%	150	2.5%	140	2.1%
Information Media and Telecommunications	60	1.2%	90	1.5%	90	1.4%
Administrative and Support Services	170	3.3%	220	3.6%	260	3.9%
Education and Training	260	5.0%	350	5.8%	410	6.2%
Other Services	210	4.0%	290	4.8%	310	4.7%
Inadequately described	70	1.3%	70	1.2%	180	2.7%
<u>Not stated</u>	<u>90</u>	<u>1.7%</u>	<u>90</u>	<u>1.5%</u>	<u>70</u>	<u>1.1%</u>
<b>Sub-total</b>	<b>1,050</b>	<b>20.2%</b>	<b>1,360</b>	<b>22.5%</b>	<b>1,610</b>	<b>24.3%</b>
<b>Total</b>	<b>5,200</b>	<b>100%</b>	<b>6,050</b>	<b>100%</b>	<b>6,630</b>	<b>100%</b>

Source: ABS Census of Population and Housing 2006, 2011, and 2016

Note: Figures rounded

## Unemployment Trends

The rate of unemployment in the Brighton Council area (9.4% in the September 2017 Quarter) is significantly above that of the Greater Hobart region (5.6%). However, this high unemployment rate is mainly driven by significant levels of unemployment in the West region.

Data for the September Quarter 2017 shows that the unemployment rate for the North region (4.7%) and the South region (2.3%) were substantially below the unemployment rate for the West region (21.7%) and also below that of Greater Hobart (5.6%), as shown in Table 2.6. However, the increase in the actual number of unemployed persons was greatest in the North region over this period (but still below the Greater Hobart unemployment rate)

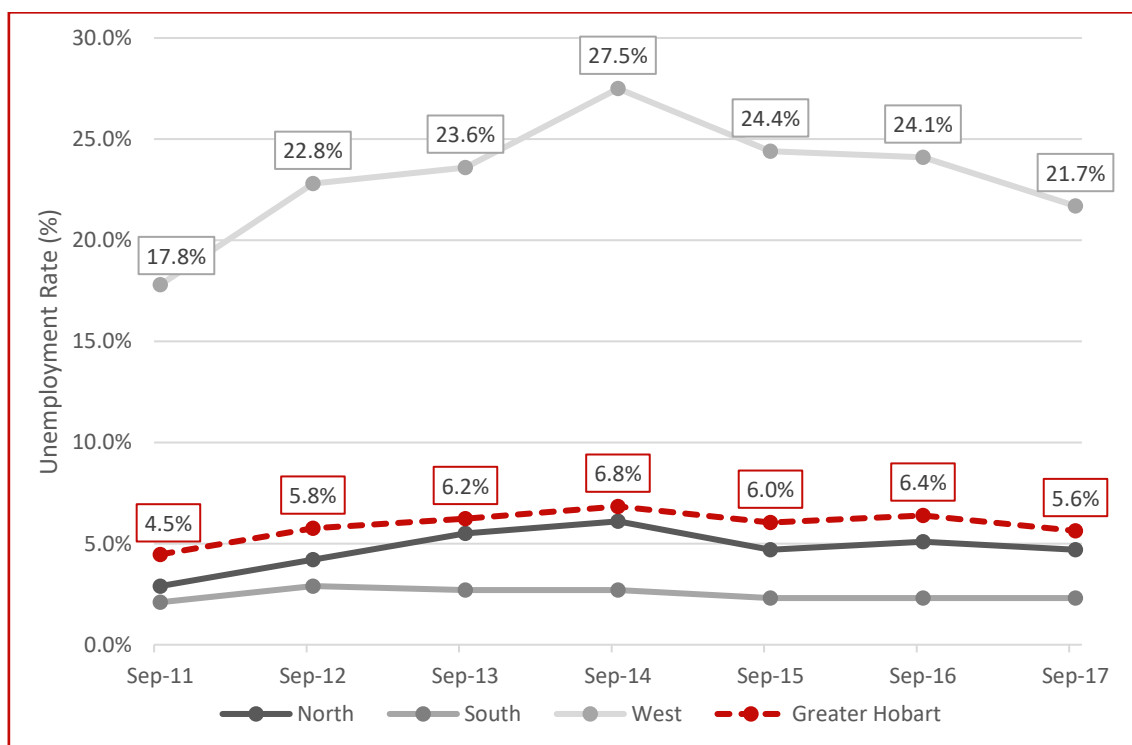
Unemployment rates in both the North and South regions are below that of Greater Hobart. In the September 2017 Quarter the unemployment rate in the South region was 2.3%, while the unemployment rate in the North region was 4.7%.

**Table 2.6: Brighton Council Labour Force and Unemployment**

Areas	2011 (September) No.	2017 (September) No.	Change 2011-2017 No.	Change 2011-2017 Rate
<b>- North</b>				
Unemployed	75	136	61	81.3%
Labour Force	2,546	2,883	337	13.2%
Unemployment Rate	3.0%	4.7%	-	-
<b>- South</b>				
Unemployed	45	57	12	26.7%
Labour Force	2,162	2,506	344	15.9%
Unemployment Rate	2.1%	2.3%	-	-
<b>- West</b>				
Unemployed	468	557	89	19.0%
Labour Force	2,623	2,562	-61	-2.3%
Unemployment Rate	17.8%	21.7%	-	-
<b><u>Brighton LGA</u></b>				
Unemployed	588	750	162	27.6%
Labour Force	7,331	7,951	620	8.5%
Unemployment Rate	8.0%	9.4%	-	-
<b><u>Greater Hobart</u></b>				
Unemployed	4,903	6,379	1,476	30.1%
Labour Force	109,759	113,285	3,526	3.2%
Unemployment Rate	4.5%	5.6%	-	-

Source: Australian Government Department of Employment – Small Area Labour Markets (September Qtr 2017)

**Figure 2.3: Brighton Council Labour Force and Unemployment**



Source: Australian Government Department of Employment, Small Area Labour Markets, September Qtr 2017

### ***Journey to Work***

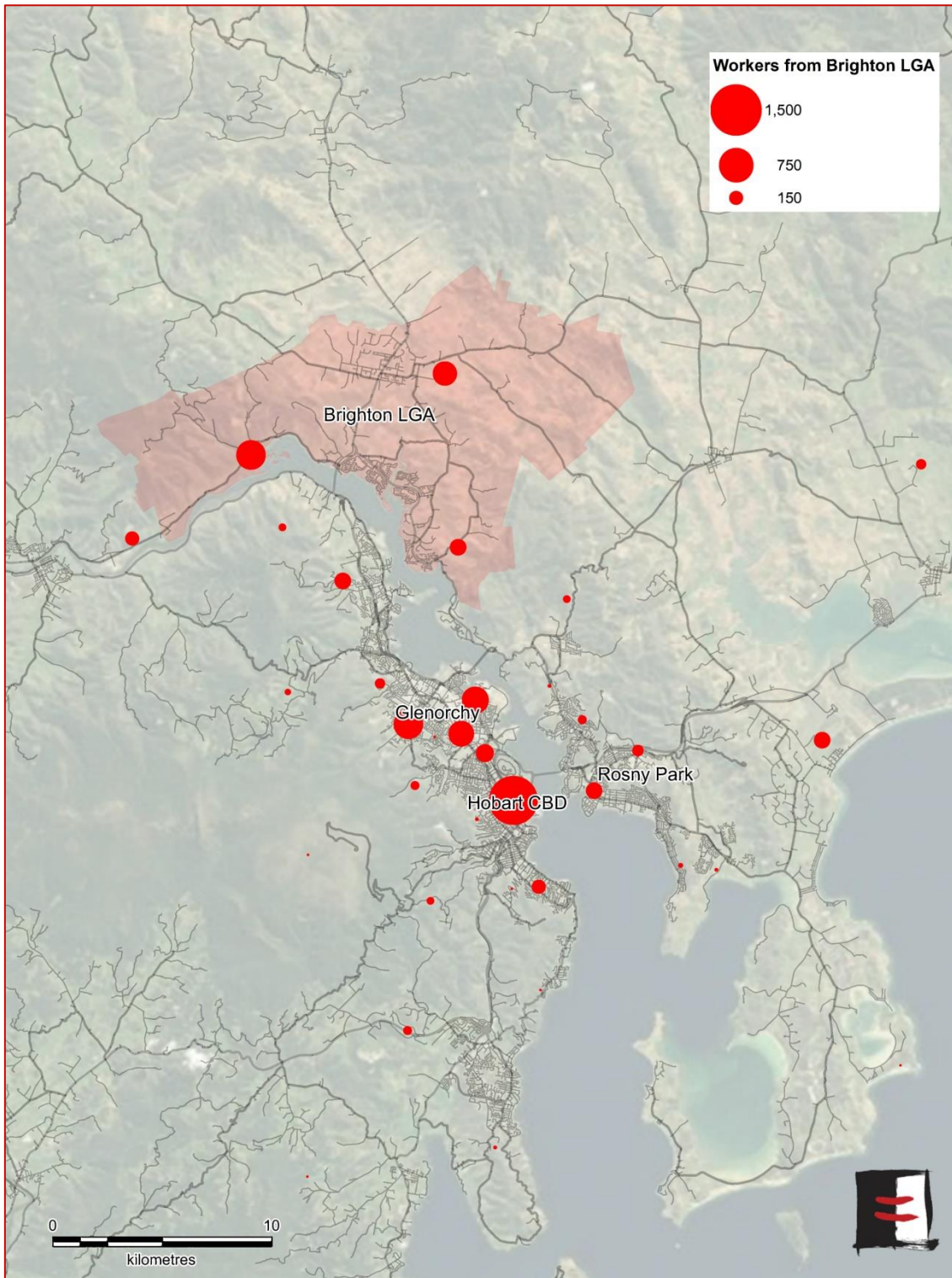
Although growth has occurred in the number of jobs located in the Brighton Council area, a significant proportion of the working population leave the local government area for employment, as shown in Figure 2.4.

At the 2016 ABS Census, 1,180 members of the Brighton Council labour force worked in the Council area, representing approximately 18% of the total Brighton Council resident labour force. Popular workplaces for the Brighton Council residents include Hobart CBD (1,400 residents or 21% of the municipality's total labour force) and the Glenorchy area (1,500 residents or 23% of the labour force), including the suburbs of Glenorchy, Derwent Park and Moonah.

It is likely that as a large portion of the population are travelling to Glenorchy and Hobart CBD for employment, a significant proportion of people are also using retail and commercial services in these areas.

Figure 2.4 provides an indication of the journey to work patterns of residents in the Brighton Council area based on ABS 2016 Census data.

**Figure 2.4: Place of Employment for Brighton Council Population, 2016**



Source: ABS Census of Population and Housing 2016

## 2.8 Implications

The key implications arising from the research and analysis presented in this Chapter – specifically for the retail, commercial and industrial land assessments in the following Chapter and more broadly the Brighton Structure Plan in general – are as follows:

- 1 As the Tasmanian economy continues to expand and attract investment, it will be important to maintain a supply of industrial land in strategic locations in the Greater Hobart region. The Brighton industrial area and specifically the Brighton Transport Hub should be viewed in the context of the broader Greater Hobart and state-wide industrial land needs.
- 2 Relatively strong population growth is forecast for the Brighton Council area in the North and South regions and, in particular, in specific growth areas within these regions. These growth areas may present opportunities for local convenience retailing to serve the increase in new resident numbers.
- 3 By 2033, the Brighton LGA is forecast to have a population of 23,950 persons. This level of population is sufficient to support a range of largely convenience-related retailing and commercial services; however, is unlikely to be sufficient to support large scale retail development such as that which is located in the larger centres of Rosny Park and Glenorchy. The opportunities for retail development are assessed in detail in Chapter 3.
- 4 Compared to the other regions, the West region is experiencing more modest population growth and is characterised by lower incomes and a very high unemployment rate.
- 5 Job growth has occurred in the traditional industry sectors of transport and logistics (+270 jobs between 2006 and 2016), manufacturing (+30 jobs) and construction (+150 jobs). The development of the Brighton Transport Hub is likely to have contributed to this job growth.
- 6 A significant proportion of employed residents travel towards Glenorchy and Hobart for work. These locations have a significantly wider range of retailing and it is likely a large proportion of retail spending of Brighton LGA residents escapes to these locations.

## 3 RETAIL AND COMMERCIAL ASSESSMENT

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This Chapter provides an overview of the existing retail and commercial situation in the Brighton Council area. In addition, potential development opportunities are identified, including forecasts of supportable retail and commercial floorspace.

### 3.1 Overview of Key Centres and Roles

For the purpose of this study, retail land uses include goods and services typically purchased by households and located in town centres, while commercial uses relate to office and other aligned activities that are also located in town centres. These retail and commercial land uses are typically located in the General Business Zone and Urban Mixed Use Zone.

Overall, the Brighton Council area has a limited retail and commercial offer which is reflective of the municipality's outer suburban location, with the population travelling into Glenorchy and Hobart for a broader and deeper retail and commercial offer. The *Southern Tasmania Regional Land Use Strategy* (STRLUS) identifies a hierarchy of activity centres, with Brighton Council having a Major Activity Centre (Bridgewater) and a Rural Services Centre (Brighton).

Key retail and commercial precincts and land uses for each town in the municipality are described below, with total occupied retail and commercial floorspace shown in Table 3.1. The location of the town centres and competing centres is shown in Figure 3.3.

#### ***Bridgewater***

Bridgewater provides the main retail and commercial offer for the municipality and is classified as a Major Activity Centre under the STRLUS. The centre comprises two key areas, Cove Hill and Green Point, together with a number of other smaller retail/commercial areas.

In total, the Bridgewater Activity Centre contains 12,180m<sup>2</sup> of occupied retail floorspace and 2,500m<sup>2</sup> of commercial floorspace.

#### **Cove Hill**

Cove Hill retail and commercial area comprises approximately 9.6ha of land located between Cove Hill Road and East Derwent Highway, and is clustered around the intersection of Cove Hill Road and Hurst Street. The area comprises two centres and is located in a General Business Zone.

The larger Cove Hill Shopping Centre includes a Coles supermarket (approximately 4,000m<sup>2</sup>), a mini-major (Reject Shop), eight specialties shops, and a KFC pad site. Two of the specialties are commercial uses, comprising a local government member's office and an employment services office. One of the specialty tenancies is also vacant. The overall presentation of the centre is aged and unattractive, and Council have highlighted that the centre currently experiences anti-social behaviour, leading to residents being hesitant to visit the centre, particularly in the evening. The total leasable floorspace is approximately 5,450m<sup>2</sup>.



A smaller retail centre is located opposite the Cove Hill Shopping Centre and to the east, and has approximately 2,250m<sup>2</sup> in leasable retail floorspace, with five tenancies. These tenancies include a general merchandise store, two fast food outlets, a liquor store and an op shop. A gym is also located in the centre.

Two additional retail stores are located approximately 250m south-east of the larger centre and comprise a hair and beauty salon and a tattoo and piercing parlour. Total retail floorspace is approximately 220m<sup>2</sup>.

**Figure 3.1 Cove Hill Shopping Centre and Adjoining Smaller Retail Centre**



Source: Essential Economics, 13<sup>th</sup> February 2018

### **Green Point**

Green Point retail and commercial area comprises approximately 3.2ha of land located in a General Business Zone which is bounded by East Derwent Highway, Green Point Road and Scott Road. The commercial and service component of Green Point comprises a retail centre, a commercial centre and a service station, and is significantly larger than Cove Hill.

The retail component of Green Point Plaza comprises approximately 3,500m<sup>2</sup> of leasable floor space, anchored by a 3,000m<sup>2</sup> Woolworths and supported by four specialty tenancies. These tenancies include a pharmacy, post office, liquor store and takeaway food café. Being a newer centre, Green Point Plaza offers a more attractive presentation compared with Cove Hill.

In addition, a significant commercial component of approximately 2,000m<sup>2</sup> in floorspace is situated to the immediate east of Green Point Plaza and comprises Centrelink, Red Cross and an employment service.

A United Service Station also operates from the corner of Green Point and Scott Road, adjacent to the commercial centre.

### **Other**

A number of other retail uses are located within an Urban Mixed Use Zone at the northern point of Bridgewater Bridge. This area includes six tenancies totalling approximately 1,000m<sup>2</sup> leasable floorspace; however, more than 40% of this floorspace is currently vacant (three

tenancies). The existing tenancies include a McDonalds, a liquor store attached to a tavern, and a takeaway chicken store.

A takeaway food establishment is also located within the Brighton Industrial Estate on Crooked Billet Drive, serving the employees of the surrounding industrial uses.

### **Brighton**

A 'town centre' precinct of land zoned General Business of approximately 6.9ha is located on Brighton Road which is the major thoroughfare through the Brighton township. The precinct has a 'main street' layout, with the area classified as a Rural Services Centre under the STRLUS.

Key land uses include an IGA supermarket, pharmacy, post office, general store, hardware store, hairdresser, two service stations, and a number of cafés and takeaway food premises (most notable being Brighton's Best Bakehouse).

**Figure 3.2 Brighton IGA Centre**



Source: Essential Economics, 13<sup>th</sup> February 2018

It is understood that a proposal has been approved for Lot 162 Brighton Road, Brighton, to develop a small shopping centre to include a small supermarket (1,300m<sup>2</sup>) and approximately 470m<sup>2</sup> of specialty tenancies.



In addition, efforts are also underway to improve tourism in the Brighton township, with the town being home to the historic Brighton Barracks, a permanent camp site constructed in 1939 to train World War II troops. An augmented reality experience is being developed to encourage tourism in this area, which involves virtual reality reconstructions of historic buildings to give a historic view of the area.

Commercial uses within the Brighton township are limited to a medical centre and a pathology premise.

### **Other**

The village of Pontville to the north of the municipality has a limited retail offer which comprises two cafés/restaurants (The Crown Inn bistro and Twelve Stones Restaurant and Reception Centre) and a vacant shopfront. Pontville is also a focus for improved tourism, with a number of augmented reality beacons planned for the historic village.

Gagebrook, located across the Jordan River to the east of Bridgewater, also contains a limited retail offer of a small general store, a service station and a vacant shop (previously an op shop). A small IGA Xpress is located in Herdsmans Cove to the south of Gagebrook.

Old Beach is located in the southern part of the municipality and retailing is limited to a neighbourhood store, and a café and hairdresser located in the St Ann's retirement community.

**Table 3.1 Summary of Existing Occupied Retail and Commercial Floorspace, 2018**

Area	Occupied Retail Floorspace	Commercial Floorspace	Total Occupied Floorspace	Major Traders
<b><u>Bridgewater</u></b>				
- Cove Hill	7,740m <sup>2</sup>	80 m <sup>2</sup>	7,820 m <sup>2</sup>	Coles
- Green Point	3,750 m <sup>2</sup>	2,080 m <sup>2</sup>	5,830 m <sup>2</sup>	Woolworths
- Other	690 m <sup>2</sup>	0	690 m <sup>2</sup>	McDonalds
<b><u>Sub-total</u></b>	<b><u>12,180 m<sup>2</sup></u></b>	<b><u>2,160 m<sup>2</sup></u></b>	<b><u>14,340 m<sup>2</sup></u></b>	
Brighton	2,460 m <sup>2</sup>	340 m <sup>2</sup>	2,800 m <sup>2</sup>	IGA
Pontville	220 m <sup>2</sup>	-	220 m <sup>2</sup>	-
Gagebrook	720 m <sup>2</sup>	-	720 m <sup>2</sup>	-
Old Beach	370 m <sup>2</sup>	-	370 m <sup>2</sup>	-
<b><u>LGA Total</u></b>	<b><u>15,950 m<sup>2</sup></u></b>	<b><u>2,500 m<sup>2</sup></u></b>	<b><u>18,450 m<sup>2</sup></u></b>	

Source: Essential Economics

### **Retail Vacancy**

The floorspace outlined above includes a number of vacant tenancies. Overall, the total vacancy rate within Brighton Council is low, at only 4.5% of total retail floorspace

However, one areas of concern exists which has a high vacancy rate. The area in the Urban Mixed Use zone at the northern point of Bridgewater Bridge has three of its six retail tenancies

vacant, resulting in a 42% vacancy rate (of floorspace). The retail vacancy for Brighton Council is shown in Table 3.2.

Although a number of the vacancy rates shown appear high, there does not seem to be an overall vacancy issue within the Brighton Council area.

**Table 3.2: Summary of Vacant Retail Floorspace, 2018**

Location	No. Vacant Premises	Vacant Retail Floorspace	Vacancy Rate
<b>Bridgewater</b>			
- Cove Hill	1	100m <sup>2</sup>	1.3%
- Green Point	0	0	0.0
- Other*	3	450m <sup>2</sup>	39.5%
<b>Sub-total</b>	<b>4</b>	<b>550m<sup>2</sup></b>	<b>4.3%</b>
Brighton	0	0	0.0
Pontville	1	90m <sup>2</sup>	23.1%
Gagebrook	1	100m <sup>2</sup>	12.2%
Old Beach	0	0	0.0%
<b>LGA Total</b>	<b>6</b>	<b>740m<sup>2</sup></b>	<b>4.5%</b>

Source: Essential Economics visits

Note \*Bridgewater Other retail includes takeaway café within industrial estate

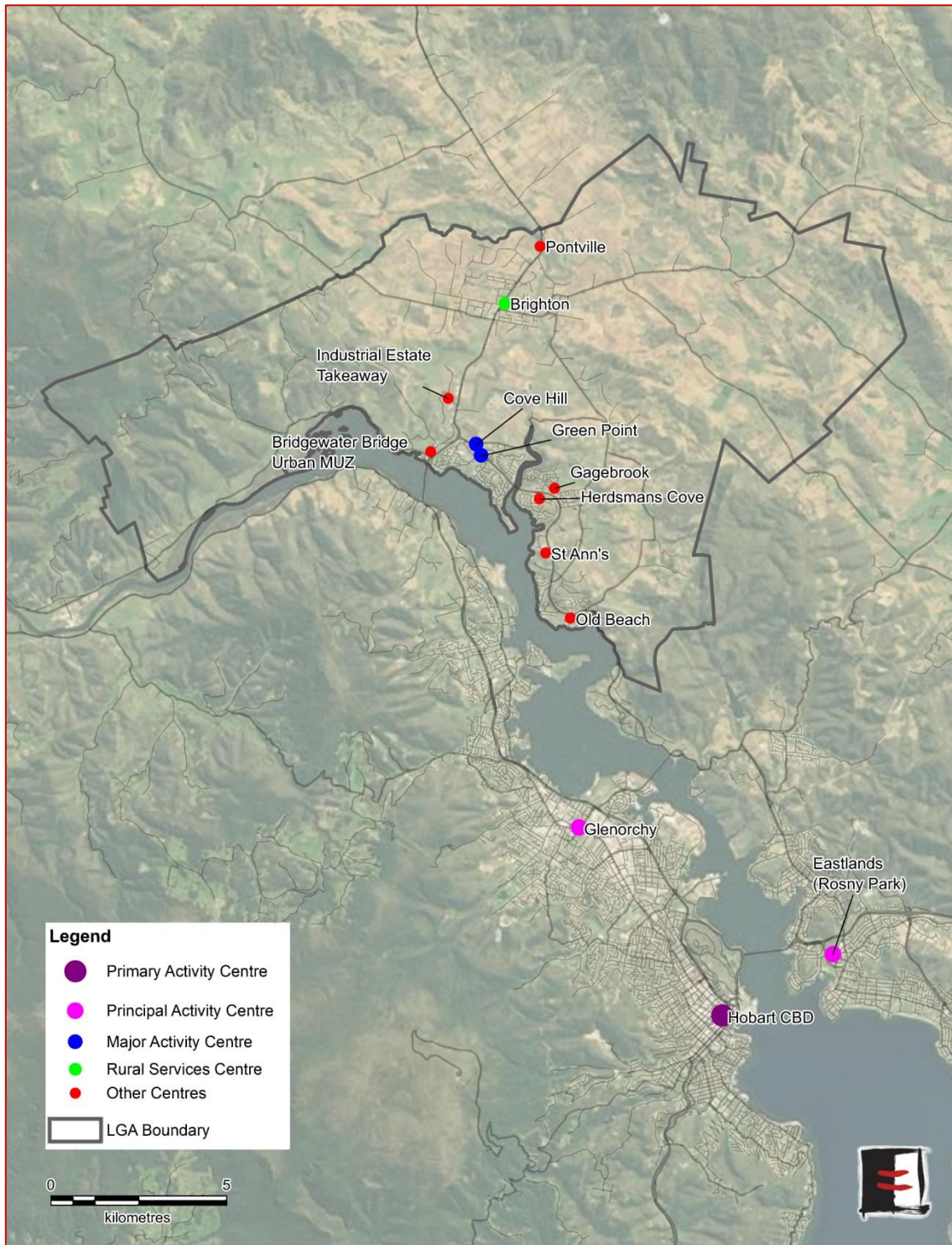
### ***Land Vacancy***

Further to the identified retail vacancies above, there are also a number of undeveloped sites in both the General Business and Urban Mixed Use zones in Bridgewater. Opportunity exists to either develop or rezone this vacant land.

The vacant land in the Bridgewater General Business zone is to the south-east of Cove Hill, and consists of 14 lots, with the majority of these located on Letitia Grove. This vacant land amounts to approximately 1.8ha, which is equivalent to 15% of the total General Business zoned land in Bridgewater.

In the Bridgewater Urban Mixed Use zone, at the northern point of Bridgewater Bridge, 7 lots have been identified as vacant, with these lots equating to 2.9ha or 34% of the total area of the zone.

Figure 3.3: Brighton Council and Competing Activity Centres



Produced by Essential Economics using MapInfo, StreetPro and Bingmaps

### 3.2 Overview of Key Competing Centres

In addition to the above centres located in Brighton Council, a number of other centres are located outside the Council area which also serve the local population. As outlined in Chapter 2, a significant proportion of the Brighton Council population commute to Glenorchy or Hobart for employment and take advantage of the larger retail and commercial offers in these areas. The key centres are described below.

#### ***Glenorchy***

Glenorchy is located 11km south of the Brighton Council area and the centre's primary retail and commercial activities are located on Main Road between King George V Avenue and Eady Street. The area is a combination of centres and high street stores, with Coles and Target located in Northgate Shopping Centre, Big W in Glenorchy Plaza, and Woolworths in Glenorchy Central.

The surrounding area offers a range of specialty retail and commercial uses, including accountants, real estate agents and medical services. A significant bulky goods retail offer is located further south in Moonah, on Main Road between Springfield Avenue and Albert Road, and includes retailers such as Harvey Norman, Harris Scarfe, and The Good Guys.

#### ***Hobart CBD***

Hobart CBD is the Primary Activity Centre for Southern Tasmania, and provides various retail and commercial offers across the CBD area. Major retail brands located in the CBD include Myer, Target, and Woolworths and these stores are supported by a broad range of specialty retail. The CBD also provides the primary location for offices, professional services, and government administration.

#### ***Rosny Park***

Eastlands Shopping Centre in Rosny Park is the largest shopping centre in Tasmania and provides a significant retail offer to the Greater Hobart region, including Brighton Council. The centre is located 18km to the south-east of the Brighton municipality and comprises approximately 31,000m<sup>2</sup> of retail floorspace. The retail offer is anchored by Kmart, Big W, Coles and Woolworths, supported by a range of other major retailers.

#### ***Cambridge***

The Cambridge Centre, located on the Tasman Highway nearby the Hobart Airport, is the primary bulky goods retail centre for the Hobart region. The centre includes a number of retail offers, including Harvey Norman, Anaconda, BCF, Supercheap Auto, Drummond Golf, and other local offers.

The location of the above centres is shown in Figure 3.4.

### 3.3 Retail Spending Forecasts

#### *Average Per Capita Retail Spending*

Estimates of per capita retail spending by Brighton Council residents have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey, ABS Census data, ABS Australian National Accounts, and other relevant sources.

Figures in this report are expressed in constant 2017 dollars.

Table 3.3 presents estimates of average per capita retail spending in 2017 for Brighton Council, and compares these estimates with the average for Tasmania. The retail spending data is presented in four major spending categories:

- **Food, Liquor and Groceries (FLG)**, which includes spending on fresh food, groceries, and take-home liquor. This is the main category relevant to supermarket-based shopping.
- **Food Catering**, which includes cafés, restaurants and takeaway food.
- **Non-Food**, which includes apparel, home wares, bulky merchandise and general merchandise.
- **Services**, which includes hairdressers, beauty salons etc.

Total per capita retail spending for the population located in the South region of Brighton Council is 7.0% above the Tasmanian state average, with a total retail spending of \$13,670 per person. This is in-line with the higher economic affluence of the population in this area.

Conversely, lower incomes in the West region results in a significantly lower per capita spending than the Tasmanian state average, at \$9,710 per person, or -24.0% below the Tasmanian average. This difference is particularly evident in the categories of Food Catering and Services, with the lower spending in these areas due to a lower level of income available for discretionary spending.

Overall, the per capita FLG spending within Brighton Council is -10.6% below the Tasmanian average.

**Table 3.3: Average Per Capita Retail Spending, Brighton Council, 2017 (\$2017)**

Trade Area	Food, Liquor and Groceries	Food Catering	Non Food	Services	Total Retail
<b><u>Per Capita Spending (\$2017)</u></b>					
North	\$5,560	\$1,300	\$4,890	\$370	\$12,120
South	\$5,980	\$1,580	\$5,630	\$480	\$13,670
West	\$5,090	\$880	\$3,500	\$240	\$9,710
<b>Trade Area</b>	<b>\$5,460</b>	<b>\$1,180</b>	<b>\$4,460</b>	<b>\$340</b>	<b>\$11,340</b>
<i>Total TAS</i>	<i>\$5,650</i>	<i>\$1,400</i>	<i>\$5,280</i>	<i>\$440</i>	<i>\$12,780</i>
<b><u>Variation from TAS average</u></b>					
North	-1.6%	-7.1%	-7.4%	-15.9%	-5.2%
South	5.8%	12.9%	6.6%	9.1%	7.0%
West	-9.9%	-37.1%	-33.7%	-45.5%	-24.0%
<b>Trade Area</b>	<b>-3.4%</b>	<b>-15.7%</b>	<b>-15.5%</b>	<b>-22.7%</b>	<b>-10.6%</b>

Source: Essential Economics with MarketInfo

Note: Figures rounded

### ***Total Retail Spending***

Estimates of total retail expenditure by Brighton Council residents, shown in Table 3.4, are based on the application of the average spending levels in Table 3.3 to population forecasts in Table 2.2. The estimates of expenditure take into consideration an allowance for real growth in average per capita retail spending which is based on historical growth rates in retail spending over the past 20 years, as demonstrated in ABS Australian National Accounts data. The spending forecasts are expressed in terms of 2017 prices and do not include price inflation.

Total retail spending for Brighton Council residents is forecast to increase from \$199.4m in 2018 to approximately \$323.1m in 2033.

Conservative retail spending growth in the West region reflects the negative population growth this region has experienced and the modest forecast population growth moving forward. In contrast, significant retail spending growth is expected in both the North and South regions due to higher per capita spending and to strong population growth forecasts as various residential developments advance.

**Table 3.4: Total Retail Spending, Brighton Council, 2018 to 2033 (\$2017)**

Retail Category	2018	2023	2028	2033
<b><u>North</u></b>				
FLG	\$32.1m	\$38.1m	\$44.2m	\$50.2m
Food Catering	\$7.5m	\$9.0m	\$10.6m	\$12.1m
Non-Food	\$28.6m	\$36.2m	\$44.9m	\$54.4m
Services	\$2.2m	\$2.7m	\$3.2m	\$3.8m
<b>Total Retail</b>	<b>\$70.4m</b>	<b>\$85.9m</b>	<b>\$102.9m</b>	<b>\$120.6m</b>
<b><u>South</u></b>				
FLG	\$24.4m	\$29.5m	\$36.7m	\$43.4m
Food Catering	\$6.4m	\$7.9m	\$9.9m	\$11.9m
Non-Food	\$23.2m	\$30.0m	\$39.8m	\$50.4m
Services	\$2.0m	\$2.5m	\$3.2m	\$3.9m
<b>Total Retail</b>	<b>\$56.0m</b>	<b>\$69.8m</b>	<b>\$89.6m</b>	<b>\$109.6m</b>
<b><u>West</u></b>				
FLG	\$38.1m	\$40.7m	\$42.9m	\$44.6m
Food Catering	\$6.6m	\$7.1m	\$7.6m	\$8.0m
Non-Food	\$26.5m	\$30.3m	\$34.1m	\$37.9m
Services	\$1.8m	\$2.0m	\$2.3m	\$2.4m
<b>Total Retail</b>	<b>\$73.0m</b>	<b>\$80.1m</b>	<b>\$86.9m</b>	<b>\$92.9m</b>
<b><u>Brighton LGA</u></b>				
FLG	\$94.6m	\$108.2m	\$123.8m	\$138.2m
Food Catering	\$20.6m	\$24.0m	\$28.1m	\$32.0m
Non-Food	\$78.3m	\$96.4m	\$118.8m	\$142.6m
Services	\$6.0m	\$7.2m	\$8.7m	\$10.2m
<b>Total Retail</b>	<b>\$199.4m</b>	<b>\$235.8m</b>	<b>\$279.4m</b>	<b>\$323.1m</b>

Source: Essential Economics with MarketInfo

### 3.4 Retail Sales and Market Share Assessment

Estimates of retail sales for the identified centres in the Brighton Council area are presented in Table 3.5. These estimates are based on the provision of occupied retail floorspace, observed trading performance, and the application of relevant industry benchmarks.

All figures are expressed in constant 2017 dollars.

In 2018, Brighton Council's total retail sales is estimated to be \$97.8m, which represents average sales of approximately \$6,130/m<sup>2</sup>.

The majority of the LGA's sales (80%) are generated within the Bridgewater activity centre which comprises the two major retail centres and various smaller retail offers. Cove Hill



provides the dominant retail offer and accounts for a greater share of Bridgewater's retail sales (approximately 60%) compared to Green Point (37%) which has a combination of retail and commercial floorspace.

**Table 3.5: Estimated Retail Sales, Brighton Council, 2018 (\$2017)**

Area	Occupied Retail Floorspace	Average Sales per m <sup>2</sup>	Total Retail Sales	Share of Total Brighton Sales
<b><u>Bridgewater</u></b>				
- Cove Hill	7,740m <sup>2</sup>	\$5,960/m <sup>2</sup>	\$46.1m	47%
- Green Point	3,750m <sup>2</sup>	\$7,580/m <sup>2</sup>	\$28.4m	29%
- Other	690m <sup>2</sup>	\$4,740/m <sup>2</sup>	\$3.3m	3%
<b>Sub-total</b>	<b>12,180m<sup>2</sup></b>	<b>\$6,390/m<sup>2</sup></b>	<b>\$77.8m</b>	<b>80%</b>
<b>Brighton</b>	<b>2,460m<sup>2</sup></b>	<b>\$5,720/m<sup>2</sup></b>	<b>\$14.1m</b>	<b>14%</b>
<b>Other</b>	<b>1,310m<sup>2</sup></b>	<b>\$4,540/m<sup>2</sup></b>	<b>\$5.9m</b>	<b>6%</b>
<b>Total</b>	<b>15,950m<sup>2</sup></b>	<b>\$6,130/m<sup>2</sup></b>	<b>\$97.8m</b>	<b>100%</b>

Source: Essential Economics with MarketInfo

Note: Figures rounded

The estimated market share of retail spending of residents has been calculated for Brighton Council and is shown in Table 3.6. 'Market share' refers to the share of a LGA's available retail spending that is captured by retailers in the identified centres.

Retail sales captured from Brighton Council residents is estimated to account for 76% of sales (or \$73.9m) for Brighton Council retailers, with an estimated 24% of the LGA's retail sales accounted for by people passing through the municipality.

In total, retailers in the Brighton Council area achieve a retail market share of 37%, meaning 63% (or \$125.3m) escapes to other centres located further afield. While achieving higher market shares (or lower escape spending) is a preferred outcome, it is likely a significant extent of retailer spending by Brighton LGA residents will continue to escape the municipality having regard for the comparatively limited retail offer, ease of access to other centres, and a large proportion of the working population travelling elsewhere for employment (and undertaking shopping on their work-related travel).

Table 3.6 summarises the retail market shares by retail category and shows the following:

- Market share of FLG retailers is estimated at 62%, which is the highest among all retail categories.
- Market share of food catering retailers is estimated at 37%, which is considered to be low and reflects a limited food catering and entertainment offer in the municipality.
- Market share of non-food retailers is estimated at a very low 9% and reflects the lack of any major brand non-food retailing in the municipality.



- Market share of services retailers is estimated at 25%, which is also considered to be low.

An estimated \$23.9 million (and equivalent to 24% of total sales) in retail sales is accounted for by sales to non-residents.

**Table 3.6: Estimated LGA Market Share by Spending Category, Brighton Council, 2018**

Spending Category	Total Retail Sales in Brighton Council	Share of Sales to Brighton Council Residents	Sales Attributed to Brighton Council Residents	Total Retail Spend of Brighton Council Residents	LGA Market Share
FLG	\$76.7m	76%	\$58.2m	\$94.6m	62%
Food Catering	\$10.3m	73%	\$7.5m	\$20.6m	37%
Non-Food	\$8.9m	75%	\$6.7m	\$78.1m	9%
Services	\$1.9m	79%	\$1.5m	\$6.0m	25%
<b>Total</b>	<b>\$97.8m</b>	<b>76%</b>	<b>\$73.9m</b>	<b>\$199.4m</b>	<b>37%</b>

Source: Essential Economics

### 3.5 Issues and Opportunities Assessment

The above retail and commercial assessment identifies a number of issues and potential opportunities relating to retail performance and development.

#### Issues

The following issues are noted:

- **High share of retail spending escaping to other centres located beyond the LGA**, with 63% of spending directed elsewhere. The share is particularly high in the categories of non-food (91% of spending), services (75%) and food catering (63%).
- **Lack of a critical mass of population to support major retail development**. The population in the Brighton LGA is forecast to reach approximately 23,950 persons in 2033 (up from 17,280 persons in 2018), which is insufficient to support large scale retail formats such as a Discount Department Store, large format homemaker retailing (e.g. Bunnings) or additional full-line supermarkets.
- **Poor Centre Presentation**. Discussion with Council officers indicates issues associated with anti-social behaviour in Bridgewater. The poor presentation of the Cove Hill Shopping Centre does little to encourage people to visit the centre, particularly in the evenings, to complete their retail shopping, and are likely to visit one of the previously identified centres outside of the Brighton Council area to avoid these issues.
- **Retail Offer Disconnection**. The retail offers in Bridgewater (namely, Cove Hill Shopping Centre and Green Point Plaza) have a level of physical disconnect, with the centres separated by East Derwent Highway which is a major thoroughfare. This disconnection,

together with the industrial surrounding uses at Cove Hill, isolates the Cove Hill retail offer.

Similarly, the lack of safe crossing spaces on Brighton Road in the 'main street' retail area of Brighton creates a similar (although lesser) disconnect between the east and west sides of this road. The provision of safe access across this road would encourage pedestrian activity and this would be expected to lead to an increased level of retail spending in the centre.

- **High vacancy rates in the Bridgewater Bridge Area.** A significant level of retail vacancy exists in the Urban Mixed Use zone at the northern end of Bridgewater Bridge, with this area generally under-utilised and limited in its retail offer. This is further apparent from the significant number of undeveloped lots, which account for 34% of the zone.
- **Limited commercial services offering.** The Brighton Council area has limited commercial uses, with total commercial floorspace estimated at only 2,500m<sup>2</sup>. Existing commercial uses are primarily employment services and Centrelink, with a limited number of other uses.

## Opportunities

Positive action in regard to the following opportunities would be expected to contribute to an improved level of performance in the retail and commercial sector in the Brighton LGA:

- **Improved presentation and integration of centres in Bridgewater.** Improving the presentation of the Cove Hill Shopping Centre and its integration with Green Point Plaza presents as an opportunity to improve the trading performance of the area and address issues associated with anti-social behaviour. This could be furthered by the development of the vacant General Business zoned land around Letitia Grove, with this integrated as part of the greater Bridgewater town centre offer.
- **Improve integration of the east and west sides of the Brighton Activity Centre** by the provision of improved connections across Brighton Road.
- **Improved commercial service offering.** Currently, Brighton Council residents have a very low provision of services which would typically locate in shop-front office floorspace, such as accountants, lawyers, health services, travel agents and the like. These types of uses account for only 14% of occupied retail and commercial floorspace. Typically, this share is in the order of 20-30% for a centre of similar role and size as those in the Brighton LGA.
- **Increased tourism focus.** As Brighton Council looks to improve their tourism offer, particularly through an improved tourism offering including the augmented reality development in Brighton and Pontville, an opportunity will develop to include small-scale retail offers to support this, particularly in the food catering category.
- **Future FLG retail opportunities.** A current proposal is to develop Lot 162, Brighton Road, Brighton for a small-scale shopping centre, including a supermarket. In addition, an opportunity exists to include a small retail component in the Tivoli Green housing estate

development. These opportunities would improve the local convenience retail offering in these localities.

### 3.6 Forecast Retail and Commercial Floorspace

#### *Retail Floorspace Demand*

Only limited opportunity exists for large-scale retail development in the Brighton municipality, although the floorspace analysis presented in Table 3.7 supports a number of smaller-scale retail opportunities. The analysis is based on the following key assumptions:

- Moderate increases in existing retail market shares as follows:
  - FLG: 62% in 2018 to 65% in 2033
  - Food Catering: 37% in 2018 remaining unchanged
  - Non-Food: 9% in 2018 to 10% in 2033
  - Services: 25% in 2018 to 30% in 2033.
- Share of turnover from beyond the LGA remains unchanged at 24% for total retail.
- Average sales levels (\$/m<sup>2</sup>) growth of 1% per annum across all retail categories.

As shown in Table 3.7, an additional +7,220m<sup>2</sup> of retail floorspace is supportable in Brighton Council in the 15-year period 2018 to 2033. Most of this additional retail floorspace (80%) would be provided in the FLG (+3,070m<sup>2</sup>) and Non-food categories (+2,730m<sup>2</sup>).

**Table 3.7: Future Retail Floorspace Requirements, Brighton Council, 2018 to 2033**

Category	Current Floorspace 2018	Future Retail Floorspace Requirements			Additional Retail Floorspace		
		2023	2028	2033	2023	2028	2033
FLG	9,300m <sup>2</sup>	10,700m <sup>2</sup>	11,650m <sup>2</sup>	12,370m <sup>2</sup>	+1,400m <sup>2</sup>	+2,350m <sup>2</sup>	+3,070m <sup>2</sup>
Food Catering	2,770m <sup>2</sup>	3,070m <sup>2</sup>	3,420m <sup>2</sup>	3,710m <sup>2</sup>	+300m <sup>2</sup>	+650m <sup>2</sup>	+940m <sup>2</sup>
Non-Food	3,240m <sup>2</sup>	4,460m <sup>2</sup>	5,230m <sup>2</sup>	5,970m <sup>2</sup>	+1,220m <sup>2</sup>	+1,990m <sup>2</sup>	+2,730m <sup>2</sup>
Services	640m <sup>2</sup>	870m <sup>2</sup>	1,000m <sup>2</sup>	1,120m <sup>2</sup>	+230m <sup>2</sup>	+360m <sup>2</sup>	+480m <sup>2</sup>
<b>Total</b>	<b>15,950m<sup>2</sup></b>	<b>19,100m<sup>2</sup></b>	<b>21,300m<sup>2</sup></b>	<b>23,170m<sup>2</sup></b>	<b>+3,150m<sup>2</sup></b>	<b>+5,350m<sup>2</sup></b>	<b>+7,220m<sup>2</sup></b>

Source: Essential Economics

Note: Figures rounded

Part of the required additional floorspace will be met by the new retail development in Brighton of 1,770m<sup>2</sup>, including a supermarket of approximately 1,300m<sup>2</sup>. It is understood that

the existing Brighton IGA will close, with the retail floorspace being repurposed for other retail uses. Overall, the result will be a net increase of 1,770m<sup>2</sup> in retail floorspace.

Accounting for this proposed development, a balance of approximately 5,450m<sup>2</sup> of forecast retail floorspace in the next 15 years remains. The Tivoli Green housing estate has the opportunity to include a small retail component, potentially in the order of 2,000m<sup>2</sup> to 3,000m<sup>2</sup>, including a 1,500m<sup>2</sup> to 2,000m<sup>2</sup> FLG offer. A development of this size would provide local convenience retailing in the South region, where convenience retailing is currently limited. These estimates are intended to provide an indication only of the potential extent of retail floorspace that could be accommodated in this location. A detailed retail floorspace assessment should be undertaken as further planning for the local area progresses, or at the time a development proposal is submitted to Council.

The balance in available future retail floorspace would likely be filled by continuing low level development, including the development of tourism offers in the Brighton and Pontville region, and limited additions to centres in Bridgewater including the development of vacant General Business zoned land.

An indicative distribution of forecast retail floorspace demand is shown in Table 3.8.

**Table 3.8 Indicative Allocation of Future Retail Floorspace, Brighton Council, 2018 - 2033**

Development	Development Floorspace
Retail Development, Brighton	+1,770m <sup>2</sup>
Tivoli Green retail, Old Beach	+2,500m <sup>2</sup>
Elsewhere (i.e. existing centres)	+2,950m <sup>2</sup>
<b>Total</b>	<b>+7,220m<sup>2</sup></b>

Source: Essential Economics

### ***Commercial Floorspace Demand***

The Brighton Council area accommodates only 2,500m<sup>2</sup> of commercial office floorspace, and this provision is equivalent to only 14% of occupied retail and commercial floorspace. Having regard for the retail floorspace demand assessment and assuming this share accounted for by office activities remains constant at 14%, potential would emerge over time for the provision of an additional 1,130m<sup>2</sup> or so of small-scale local commercial office floorspace.

However, a 14% share of commercial office floorspace is considered to be low. If this share was to increase to 20%, which is more in line with the role and size of centres in the Brighton Council, the result would be an increase of around 3,330m<sup>2</sup> of additional commercial office floorspace over the next 15 years. Achieving this rate of development would significantly improve local access to commercial services.

It would be expected the majority of the commercial floorspace demand would be directed to the Bridgewater activity centre and, to a limited extent, to the Brighton activity centre.

### 3.7 Implications

Key implications for the Structure Plan arising from this analysis are as follows:

- Forecast demand exists for approximately 7,220m<sup>2</sup> of additional retail floorspace over the period 2018 to 2033. Indicatively, this could be distributed in the following manner:
  - Brighton retail development proposal: +1,770m<sup>2</sup>
  - Tivoli Green, Old Beach: +2,500m<sup>2</sup>
  - Elsewhere (Bridgewater, Pontville, other local centres): +2,950m<sup>2</sup>

*Note: the above is intended to be indicative only and more detailed local assessments would be required over time as population levels increase.*

- Forecast demand for at least 1,130m<sup>2</sup> of additional commercial office floorspace over the period 2018 to 2033, with the majority of this floorspace to be distributed in the Bridgewater and Brighton activity centres.
- Opportunities exist to improve the performance of centres in Bridgewater by improving the appearance, perception and integration of retail areas within the centres.
- Opportunities also exist to improve the performance of the Brighton activity centre by improving access across Brighton Road.

## 4 INDUSTRIAL LAND ASSESSMENT

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The demand and supply side factors that inform the development of industrial land in Brighton Council are outlined in this Chapter, as well as the implications for future zoning.

### 4.1 Industrial Land Context

Industrial land in Brighton Council has the potential to attract enterprises whose trade and operations broadly relate to either of the following three spatial contexts: the 'local service' context, 'regional service' context, and 'state-wide' context.

The 'local service' context relates to those enterprises who draw trade or operate primarily in the Brighton Council area (the local area). Examples of 'local service' type industrial uses include local auto mechanics or small trades businesses.

The 'regional service' context relates to those larger enterprises who operate or draw trade from the wider Hobart or Southern Tasmania region. Industrial land in Brighton Council effectively competes with other industrial precincts in the Hobart/Southern Tasmania region to attract these (regional) enterprises. Cambridge Park industrial precinct near Hobart Airport is an example of a location which competes with Brighton Council to attract 'regional service' industry.

The 'state-wide' context relates to those enterprises whose trade and operations relate to the broader Tasmania context, but operate from their Brighton Council location. Accordingly, industrial land in Brighton competes with industrial precincts elsewhere in Tasmania to attract industrial these (state-wide) enterprises. The TRANSlInk industrial precinct located near Launceston and adjacent the Midland Highway and Launceston Airport is an example of a location which competes with Brighton Council on a state-wide basis.

The transport and logistics companies Toll Holdings and SRT are the foremost examples of 'state-wide' enterprises currently located in the Brighton Council. Transport, logistics and warehousing uses are most likely to establish 'state-wide' operations in the municipality. The key attribute of Brighton Council for attracting major transport, logistic and warehousing uses is the municipality's strategic location north of Hobart and on the Midland Highway, which is the predominate road freight link between Hobart and Launceston in Northern Tasmania.

Another crucial factor is the recent development of the Brighton Transport Hub, which replaced the outdated Hobart rail yards as southern Tasmania's key intermodal freight facility. The Brighton Transport Hub opened in 2014 with Toll Holdings as the anchor tenant. The Hub provides a location/facility for the warehousing and transfer of goods along the north-south freight route between different transport and storage modes.

Although not specifically related to the three spatial contexts aforementioned, Brighton Council also has the capacity to attract export orientated industries. Key factors which inform the potential for Brighton Council to attract export orientated industry include the

municipality's strategic location north of Hobart on the Midland Highway, and relative proximity to the Derwent Valley and Midlands agricultural regions.

Finally, the development of industrial land relevant to any of the contexts described above is contingent on a supply of appropriate sites being available. Indeed, a particular attribute of Brighton Council for attracting enterprises in the regional, state-wide or export-orientated context is the municipality's supply of developable industrial land and ability to provide larger unencumbered sites.

## 4.2 Overview of the Regional Industrial Land Context

A detailed outline of the industrial land context in the wider Hobart and Southern Tasmania is provided by the *Southern Tasmania Industrial Land Strategy (2013)*, a report written by SGS Economics & Planning as part of the *Southern Tasmania Land Use Strategy (2013)*. The SGS report considered the adequacy of industrial land provision in Southern Tasmania, as well as suggesting measures and planning provisions to ensure that future land supply meets the needs of industry.

Overall, the SGS report forecast that there was insufficient industrial land in Greater Hobart to meet projected demand for the next 15 years (to 2028). In particular, SGS forecast a total shortfall of between 34-88 hectares of land appropriate for regionally significant sites that would cater to export-orientated industries, as well as transport and warehousing.

For Brighton Council, SGS projected a shortfall in local service aligned industrial land supply over the next 15 years (to 2028), due to a lack of smaller lots and competing demand from transport and warehousing, and export-orientated industries. The SGS report noted that Brighton was continuing to attract significant industries of regional significance (in 2013), especially in the areas of transport and logistics.

Brighton Council, has the largest provision of industrial zoned land of any Council in Southern Tasmania. Currently, around 524 hectares of land is zoned for industrial use in the municipality, with 500 hectares in the General Industrial Zone (GIZ), and a further 24 hectares in the Light Industrial Zone (LIZ). Almost 150ha of GIZ land belongs to Boral Quarry. The location and size of key industrial precincts in the wider Hobart region is shown in Figure 4.1 and Figure 4.2.

Over the past five years, the total value of industrial building approvals has been approximately \$115.9m in the Greater Hobart area, of which \$25.1m or 21.6% occurred in the Brighton SA3 (which reflects the Brighton Council area). The vast majority of investment in the Brighton SA3 was attributed to the development of the Brighton Transport Hub in 2013. Apart from the Transport Hub's development, the value of industrial building in Brighton SA3 has been relatively marginal across the five years when compared to other SA3s in Greater Hobart.

The Hobart North East SA3 which accommodates the Cambridge Park, Rokeby, Mornington, and Risdon industrial precincts observed the largest total value of industrial building approvals of any SA3 in Greater Hobart across the five years. The value of industrial building approvals in Greater Hobart SA3s, as well as the rest of Tasmania is shown in Table 4.1. It should be noted that Brighton SA3 reflects Brighton LGA.

**Table 4.1: \$ Value of Industrial Building, Greater Hobart SA3s & Rest of Tasmania**

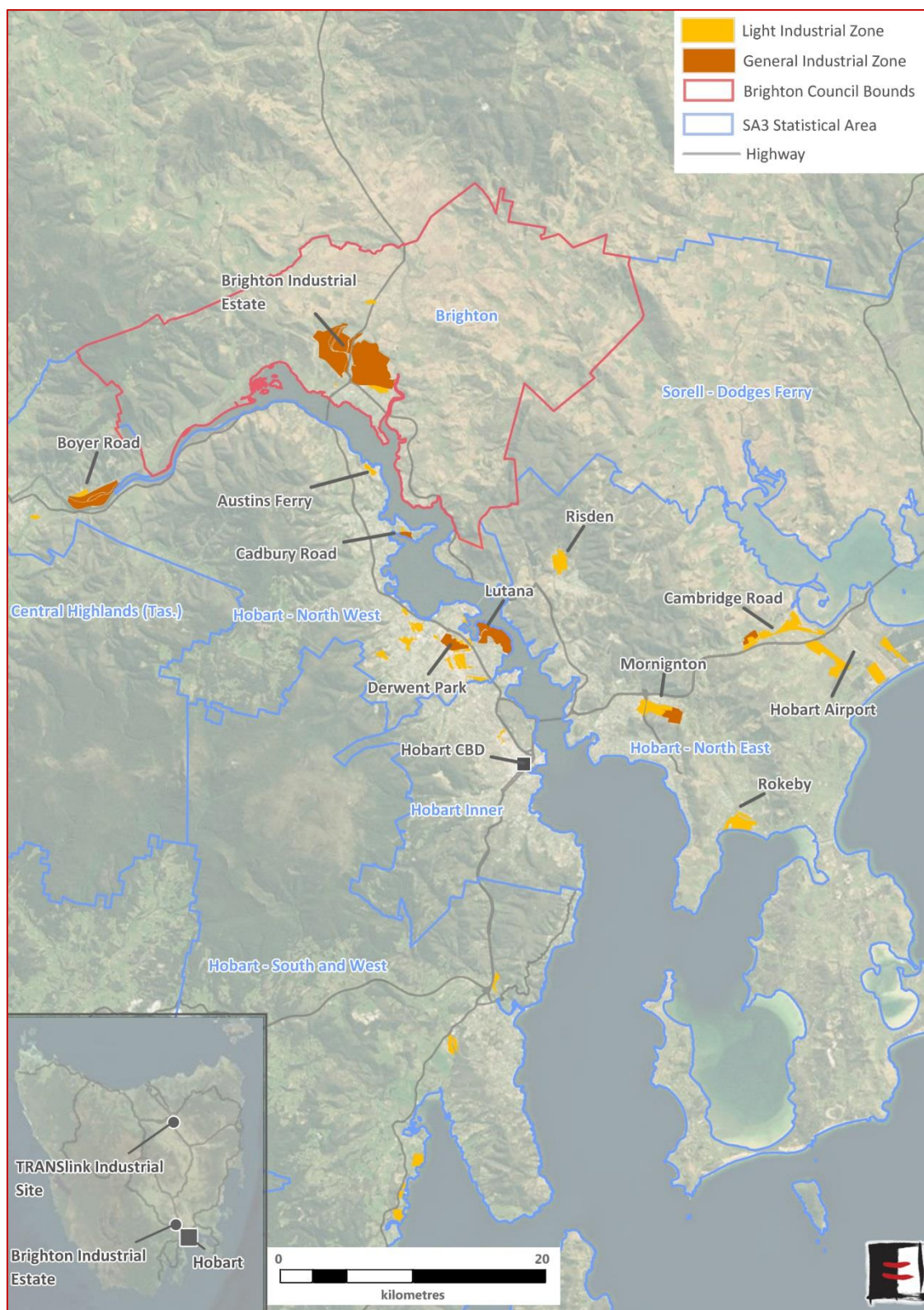
Category	2013	2014	2015	2016	2017	2013-2017 Total	% Share of Total Greater Hobart
<b><u>Greater Hobart SA3s</u></b>							
Brighton	\$23.6m	\$0.7m	\$0.5m	\$0.3m	\$0.1m	<b>\$25.1m</b>	21.6%
Hobart - North East	\$9.1m	\$8.4m	\$10.1m	\$9.4m	\$6.5m	<b>\$43.6m</b>	37.6%
Hobart - North West	\$2.6m	\$5.8m	\$8.0m	\$6.6m	\$1.6m	<b>\$24.7m</b>	21.3%
Hobart – South & West	\$2.1m	\$1.4m	\$1.9m	\$5.2m	\$2.3m	<b>\$12.9m</b>	11.1%
Hobart Inner	\$5.5m	\$0.0m	\$0.8m	\$0.2m	\$0.8m	<b>\$7.2m</b>	6.2%
<u>Sorell - Dodges Ferry</u>	<u>\$0.2m</u>	<u>\$0.3m</u>	<u>\$0.4m</u>	<u>\$0.9m</u>	<u>\$0.7m</u>	<u><b>\$2.5m</b></u>	<u>2.1%</u>
<b>Total</b>	<b>\$43.0m</b>	<b>\$16.7m</b>	<b>\$21.7m</b>	<b>\$22.6m</b>	<b>\$11.9m</b>	<b>\$115.9m</b>	<b>\$100.0</b>
Rest of Tas.	\$35.9m	\$56.9m	\$74.0m	\$48.3m	\$42.2m	\$257.2m	-

Source: ABS.Stat

Note: The Brighton SA3 reflects the Brighton LGA in the context of Industrial Land

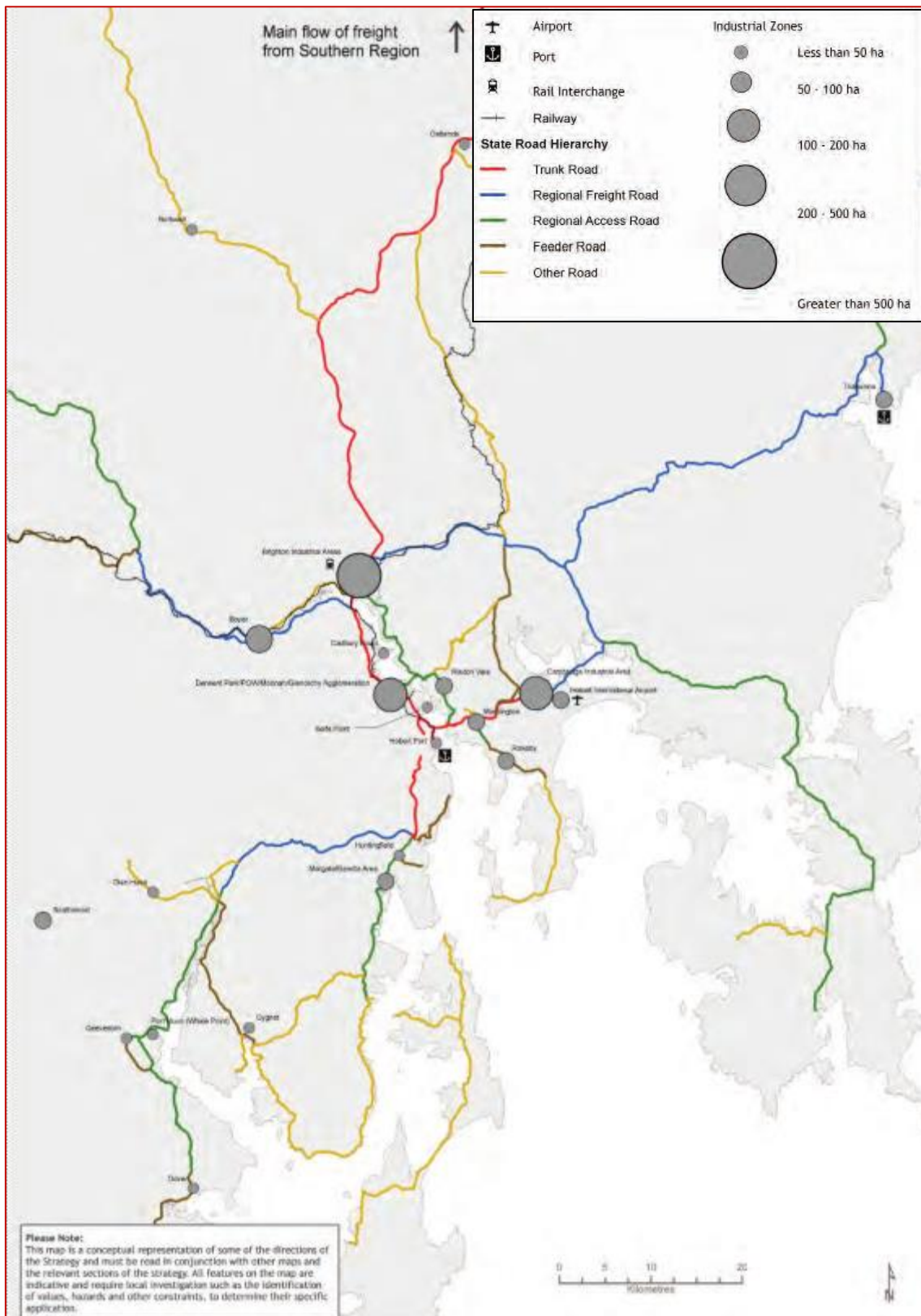


**Figure 4.1: Key Industrial Precincts in Hobart Region**



Produced by Essential Economics with MapInfo, Nearmap and StreetPro

Figure 4.2: Industrial Precincts by Quantum of Zoned Land, Southern Tasmania



Source: Southern Tasmania Regional Land Use Strategy 2013

### 4.3 Overview of Brighton Council Industrial Areas

Analysis of industrial land in Brighton Council has been informed by observations made onsite by the consultant (a field trip was undertaken on the 13<sup>th</sup>-14<sup>th</sup> February 2018), as well a review of Nearmap imagery and relevant ABS (and other) statistics.

Industrial land at Brighton Council is predominately located in the following precincts/nodes:

- Brighton Industrial Estate
- Bridgewater Industrial Precinct, and
- Brighton Township Light Industrial Node.

An overview of industrial land in each location including key uses, occupied/non-developable land, vacant land, and recently developed land (between December 2011 and November 2017) is provided in Figure 4.3, Figure 4.4, and Figure 4.5 on the following pages.

In addition to those precincts/nodes listed above, an area of land in the Light Industrial Zone is situated adjacent Cobbs Hill Road at Bridgewater. This land accommodates the Brighton Council Depot and is not considered a key location in terms of analysis and discussion.

The key locational features and industrial uses located in the three precincts/nodes listed above are outlined below.

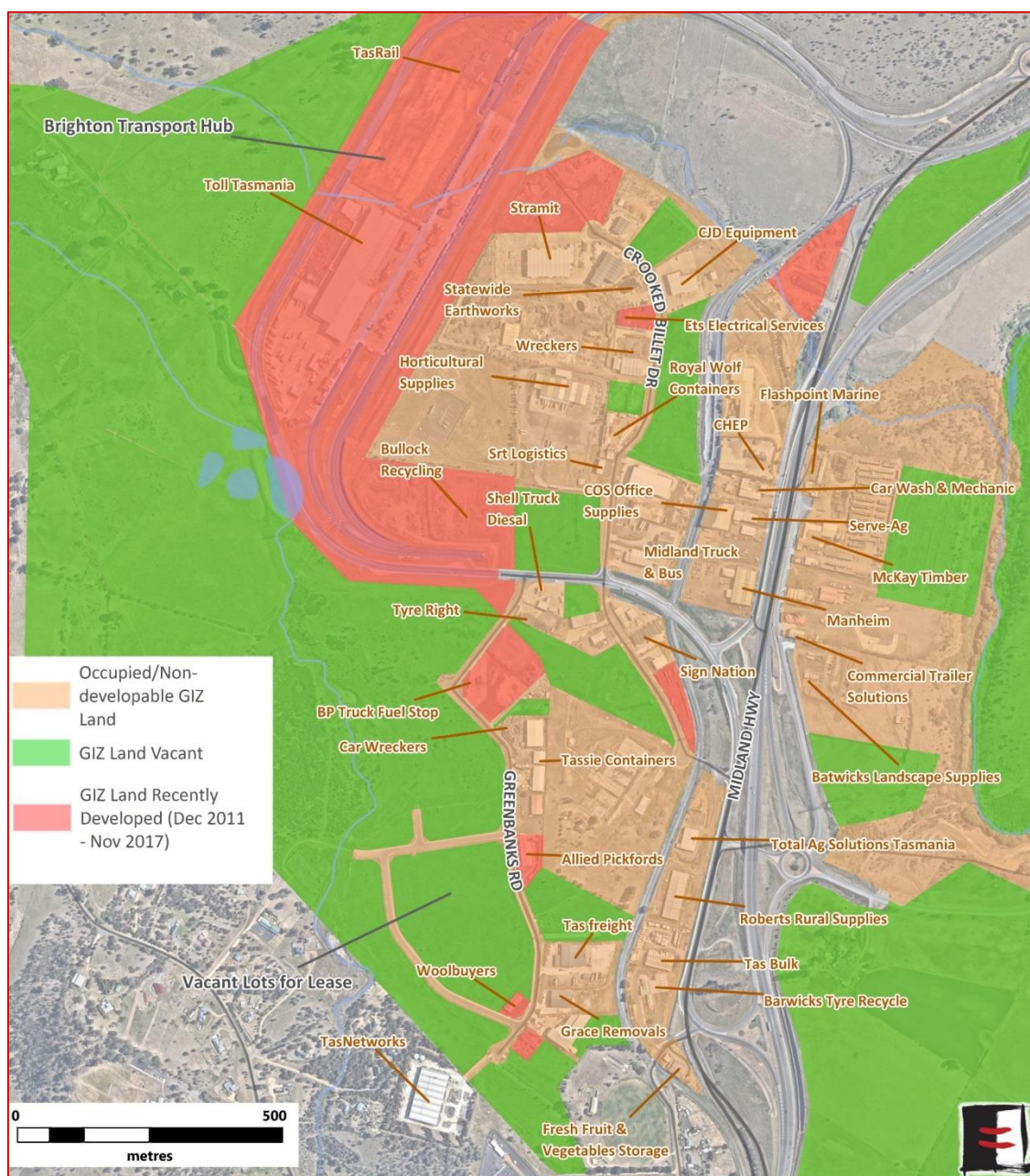
#### ***Brighton Industrial Estate***

The Brighton Industrial Estate comprises land in the General Industrial Zone (GIZ) located adjacent the Midland Highway between the townships of Bridgewater and Brighton. The majority of occupied GIZ land is situated to the west of the Highway (see Figure 4.3).

A broad range of industrial uses serving local, regional and state-wide contexts are located at the Estate. The most significant uses in terms of scale primarily relate to the transport, logistic and freight sector and include Toll Tasmania, SRT Logistics and Tas Freight. The Estate also contains a number of enterprises that are aligned to the following industry typologies: construction and engineering, earthmoving and landscaping, automotive, commercial hire, storage, agriculture, and forestry (timber), as shown in Figure 4.3.



**Figure 4.3: Overview of Brighton Industrial Estate (including Brighton Transport Hub)**



Produced by Essential Economics with Mapinfo, Nearmap and StreetPro

A significant feature of the Brighton Industrial Estate is the recently developed Brighton Transport Hub, which has elevated the Estate's freight and logistics role and would be expected to drive further development of freight, logistics and warehousing type uses.

A significant quantum of industrial land in the Estate is yet to be developed, including both subdivide (vacant lots), and non-subdivided land. There is ample opportunity for the Estate to keep developing in a westerly and south-westerly direction based on the prevailing extent of

land in the GIZ, and provide a range of lot sizes including supersized lots (over 8 hectares) for key logistics and warehousing uses.

In the Estate's south-western corner, 24 lots in a range of smaller sizes have been recently subdivided and are currently available for lease. It is understood (based on conversations with a local real estate agent active in the area) that although a tenant has yet to be secured in this new subdivision, there has been interest from the market. The Cambridge Industrial Park is viewed by some prospective tenants as a superior location from a regional service perspective.

An area of undeveloped land in the GIZ, adjacent the Midland Highway and Possum Road, to the north-east of current occupied industrial land in the Estate has potential to provide opportunities for the development of some industrial (e.g. hire companies) and showroom type uses which rely on passing trade.

Although a substantial quantum of vacant land in the GIZ is located to the east and south-east of those industrial uses currently situated on the eastern side of the Midland Highway, it is uncertain whether further industrial development in an easterly and south-easterly direction could occur due to the activities of the Boral Quarry, noting that Boral own the majority of this land. It is understood that the long-term views of Boral regarding the establishment of industry on this land will be clarified further as the Structure Planning process progresses.

### ***Bridgewater Industrial Precinct***

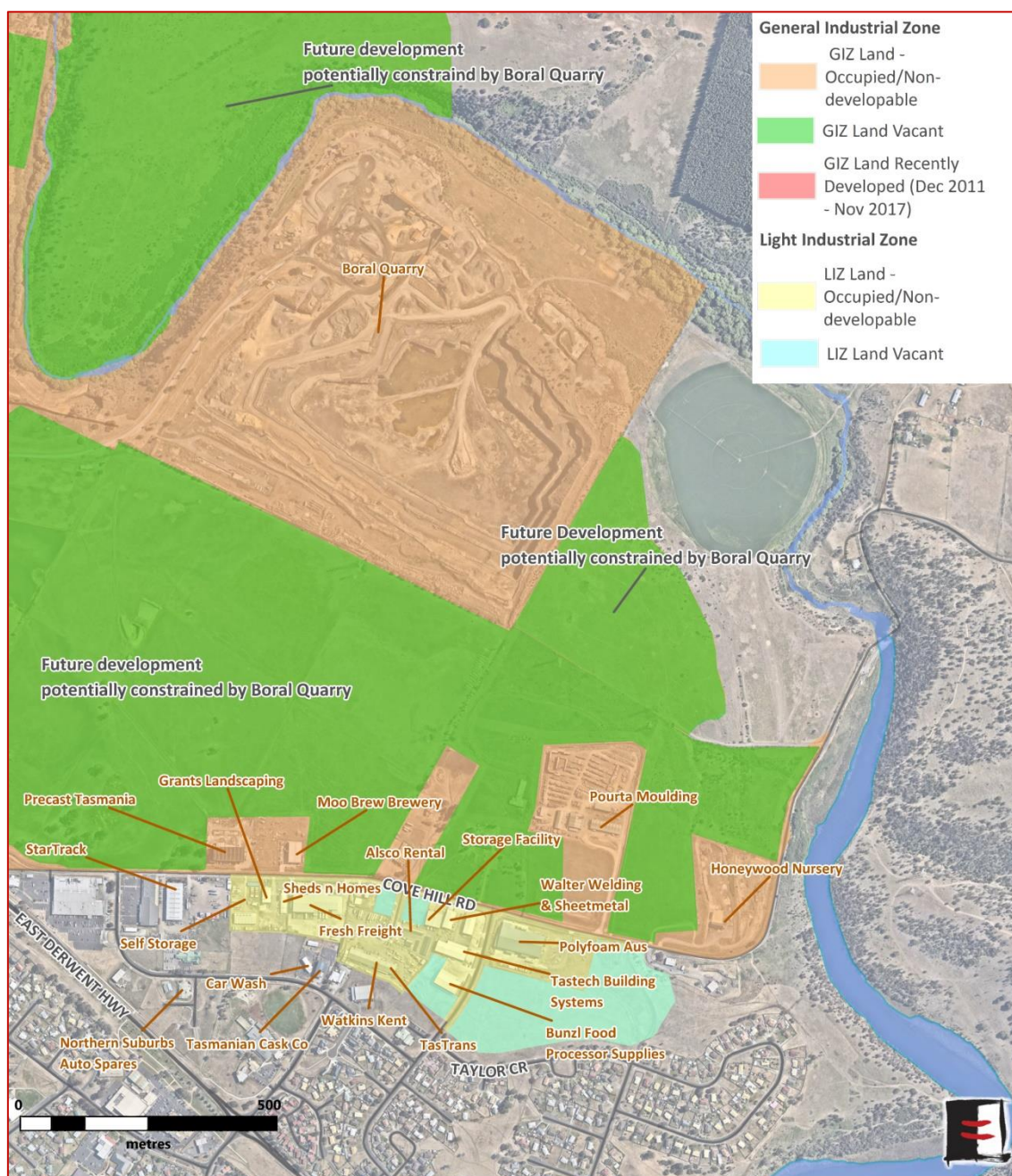
The Bridgewater Industrial Precinct comprises some 16.4ha of land in the Light Industrial Zone (LIZ) bound by Cove Hill Road (to the north), Cowle Road (to the east), and Hurst Street to the south and east. In addition, a number of industrial uses are located north of Cove Hill Road in the GIZ – Precast Tasmania, Moo Brew Brewery, Pourta Moulding and Honeywood Nursery. The opportunity for further development of the GIZ to the north of Cove Hill road is uncertain due to the majority of this land being owned by Boral.

The land situated in the LIZ accommodates a broad range of industrial uses including storage, rental, construction and engineering, as well a manufacturing, refer Figure 5.4. As shown in Figure 4.4, 6.8ha of vacant land in the LIZ located to the south of Cove Hill Road and north of Taylor Crescent will allow for the future development in a south-westerly direction.

No vacant lots were developed between 2011 and 2017 in the Precinct as a whole, based on a review of Nearmap aerial imagery.



Figure 5.4: Overview of Bridgewater Industrial Precinct



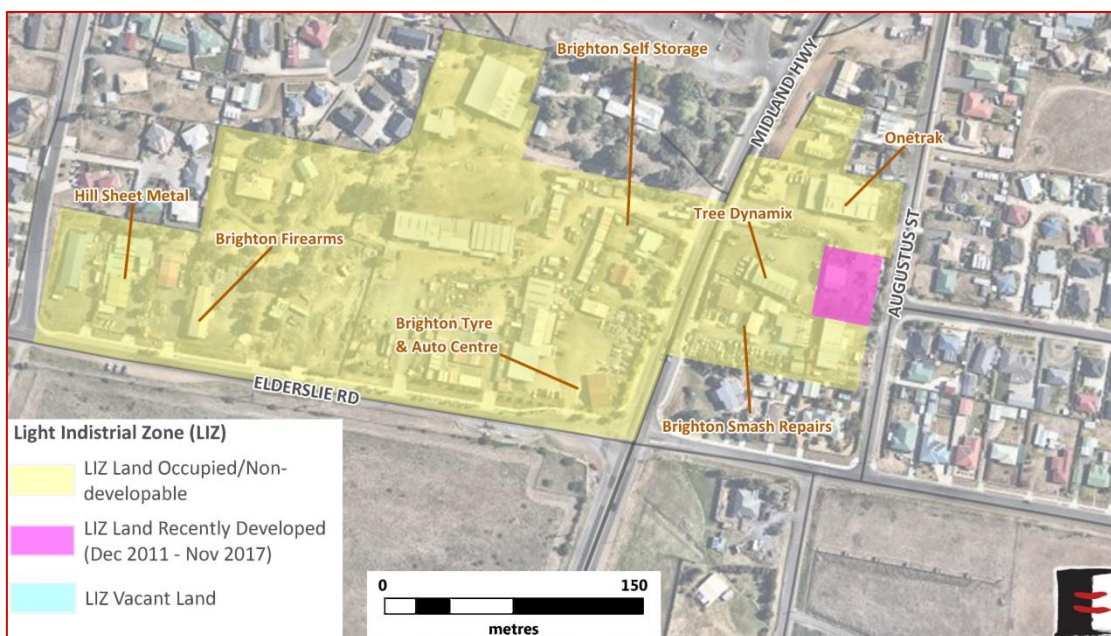
Produced by Essential Economics with MapInfo, Nearmap and StreetPro

### Brighton Township Light Industrial Node

The Brighton Township Light Industrial Node comprises approximately 6.6ha of land in the Light Industrial Zone, located in Brighton township and directly north of Elderslie Road, refer Figure 4.5.

This light industrial node is completely built out, with existing enterprises predominately operating/trading in a local service context.

**Figure 4.5: Overview of Brighton Township Light Industrial Zone Node**



Produced by Essential Economics with MapInfo, Nearmap and StreetPro

## 4.4 Industrial Land Demand and Supply Considerations

For the purposes of this industrial land assessment, a high-level analysis of vacant/undeveloped industrial land (supply) and recent industrial land development (land uptake) in Brighton Council was undertaken.

In broad terms, the Brighton Council has a very substantial supply of vacant/undeveloped industrial land, with around 301ha or 57% of total industrial land in the municipality currently vacant/undeveloped.

Over the last 5.9 years (from December 2011 to November 2017) some 45.8ha of industrial land was developed in the municipality. Of this 45.8ha, nearly all of this land (45.7ha) was developed in the GIZ, with one lot (0.1ha) being developed in the LIZ. It should also be noted that of the 45.7ha developed in the GIZ, around 27ha was attributed to the developed of the Brighton transport Hub in 2013.

Table 4.2 summarises the existing supply and recent development rate of industrial land in Brighton Council.



**Table 4.2: Industrial Land Provision and Uptake, Brighton Council, 2017**

Zone	Total Land	Vacant/Undeveloped (November 2017)	Annual Land Uptake (Dec 2011-Nov 2017)
General Industrial Zone	500.3ha	294.5ha	7.8ha
Light Industrial Zone	<u>24.0ha</u>	<u>6.8ha</u>	<u>0.0ha*</u>
<b>Total</b>	<b>524.3ha</b>	<b>301.3ha</b>	<b>7.8ha</b>

Source: Essential Economics with Nearmap and MapInfo

Note: \*One 0.1 ha LIZ lot was developed between December 2011 and November 2017 giving an annual uptake rate of 0.024ha for the 5.9 years.

Brighton Council has approximately 38 years of supply in the GIZ, based on the historical annual uptake of 7.8ha a year and the current provision of vacant land in the GIZ (294.5ha).

Excluding the one-off development of the Brighton Transport Hub (27ha) and land owned by Boral which is unlikely to become available for development in the foreseeable future (up to 145.5ha) from the demand and supply calculations, a supply of approximately 48 years of GIZ land exists in Brighton Council.

As a general rule of thumb, a 15-year supply of industrial land is viewed acceptable from an economic and planning perspective. If anything, the provision of GIZ land in Brighton Council is excessive based on recent development/uptake rates. Overprovision of zoned land can result in inefficient use and fragmented development, and there is already evidence of these trends occurring in the Brighton Industrial Estate, in particular in the Estate's southern reaches. In view of this, no additional supply in the GIZ should be added in the near-term.

Although very limited uptake has occurred in the Light Industrial Zone in recent years, the 6.8ha of LIZ supply may be insufficient if uptake levels were to increase. Hypothetically, if the uptake rate was to increase on an annual basis from 0.02ha, to say, 2 hectares, the current supply would last for just 3.4 years. Note, that the annual uptake rate for land in the GIZ between December 2011 and November 2017 was estimated to be 3.1ha, excluding development of the Brighton Transport Hub.

Given the excess supply of land in the GIZ as discussed above, consideration may be given to rezoning some GIZ land in, say, the Brighton Industrial Estate to LIZ. A potential area of GIZ land for rezoning is that land located directly north of the Midland Highway and west of Possum Road, noting the exposure this land has to potential passing trade as discussed previously.

But given the land development outcomes generated by the GIZ and LIZ in Brighton are relatively similar for smaller and medium lot sizes, rezoning GIZ land to LIZ may not inform a material uplift to land use and development outcomes. For example, it could be argued that nearly all uses currently located in LIZ land in Brighton Council could be equally accommodated by land in the GIZ, an exception being the dancing school located in the LIZ in the Bridgewater Industrial Precinct. This aspect may need consideration throughout the structure planning process.

Furthermore, noting that LIZ's focus on minimising amenity impacts and land use conflict with other uses (including residential) as per the State Planning Provisions, it is questionable whether a need exists for LIZ land in the Brighton Industrial Estate given the Estate is relatively well separated from neighbouring uses that could pose amenity or land use conflict concerns.

Given the three predominate spatial contexts that industrial land in Brighton Council services (local, regional, and state-wide), a higher order consideration for Council would be the provision of an adequate range of lot sizes for the variety of industrial uses likely to be accommodated by the municipality's industrial land in the future.

A strong attribute of Brighton Industrial Estate is its current provision and future potential to deliver lots geared appropriate for local, regional, state-wide and export operations. The deficiency in smaller local service lots identified by the SGS Economics & Planning in 2013 (discussed previously in Section 5.2) has been addressed by a 24-lot sub-division in Brighton Industrial Estate which has occurred since 2013. At the other end of the lot size spectrum, undeveloped land in the GIZ to the west and south-west in the Brighton Transport Hub should provide strong future opportunities for those logistics, warehousing & freight uses which require large sites (in excess of 8 hectares).

#### 4.5 Implications

The following implications arise from the analysis and discussion presented in this Chapter.

- The Brighton Council has significant supply of industrial land and the locational attributes to attract a variety of industries serving local, regional, state-wide and interstate/overseas markets.
- The recent development of the Brighton Transport Hub (intermodal facility) has enhanced the municipality has a location for the development key freight, logistics and warehousing facilities.
- Demand for industrial land in Brighton Council will likely increase in the future as supply in established industrial areas within the Greater Hobart area becomes more limited, precluding the development of new regionally significant sites, as noted by SGS Economics and Planning (*Southern Tasmania Industrial Land Strategy, 2013*).
- As a whole, there is no apparent need for additional industrial land zoned for industry to be delivered in the foreseeable future. Potential may exist to rezone some GIZ land to LIZ given the current limited supply of land in the LIZ (6.8ha). Although the need for this to occur is uncertain given the apparent suitability GIZ land to accommodate surplus LIZ demand.
- Council should seek to encourage consolidated industrial land use patterns and efficient use of land in the Brighton Industrial Estate, noting that evidence of some fragmentation and inefficient use currently exists.

Finally, although not specifically relevant to the broader economic context of industry in Brighton Council, the amenity and overall presentation of industrial areas from an urban design perspective is one aspect that Council may seek to improve. In particular, there is

substantial scope to improve the urban design outcomes in the Brighton Industrial Estate to a level which is consistent the Estate's future role as a key location for regionally significant and/or state-wide industrial uses.

It is well known that improvements to the public realm and street scapes often effect behaviour changes from land owner and tenants relating to presentation of land and facilities. Such an outcome would bode well for the Brighton Industrial Estate as well as other industrial locations in the municipality.

## 5 SUMMARY OF KEY IMPLICATIONS

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A summary of the key implications of the analysis and discussion presented in this report is provided below:

### ***Regional and Economic Context***

- 1 As the Tasmanian economy continues to expand and attract investment, it will be important to maintain a supply of industrial land in strategic locations in the Greater Hobart region. The Brighton industrial area and specifically the Brighton Transport Hub should be viewed in the context of the broader Greater Hobart and state-wide industrial land needs.
- 2 Relatively strong population growth is forecast for the Brighton Council area in the North and South regions and, in particular, in specific growth areas within these regions.
- 3 By 2033, the Brighton LGA is forecast to have a population of 23,950 persons. This level of population is sufficient to support a range of largely convenience-related retailing and commercial services; however, is unlikely to be sufficient to support large scale retail development such as that which is located in the larger centre of Rosny Park and Glenorchy.
- 4 Compared to the other regions, the West region has modest population growth and is characterised by lower incomes and a very high unemployment rate.
- 5 Recent job growth has occurred in the traditional industry sectors of transport and logistics (+270 jobs between 2006 and 2016), manufacturing (+30 jobs) and construction (+150 jobs). The development of the Brighton Transport Hub is likely to have contributed to this job growth.
- 6 A significant proportion of employed residents travel towards Glenorchy and Hobart for work. These locations have a significantly wider range of retailing and it is likely a large proportion of retail spending of Brighton LGA residents' escapes to these locations.

### ***Retail and Commercial Assessment***

- 7 Forecast demand exists for approximately 7,220m<sup>2</sup> of additional retail floorspace over the period 2018 to 2033. Indicatively, this could be distributed in the following manner:
  - Brighton retail development proposal: +1,770m<sup>2</sup>
  - Tivoli Green, Old Beach: +2,500m<sup>2</sup>
  - Elsewhere (Bridgewater, Pontville, other local centres): +2,950m<sup>2</sup>

*Note: the above is intended to be indicative only and more detailed local assessments would be required over time as population levels increase.*

- 8 Forecast demand for at least 1,130m<sup>2</sup> of additional commercial office floorspace over the period 2018 to 2033, with the majority of this floorspace to be distributed in the Bridgewater and Brighton activity centres.
- 9 Opportunities exist to improve the performance of centres in Bridgewater by improving the appearance, perception and integration of retail areas within the centres.
- 10 Opportunities also exist to improve the performance of the Brighton activity centre by improving access across Brighton Road.

### ***Industrial Land Assessment***

- 11 Brighton Council has significant supply of industrial land and the locational attributes to attract a variety of industries serving local, regional, state-wide and interstate/overseas markets.
- 12 The recent development of the Brighton Transport Hub (intermodal facility) has enhanced the municipality has a location for the development key freight, logistics and warehousing facilities.
- 13 Demand for industrial land in Brighton Council will likely increase in the future as supply in established industrial areas within the Greater Hobart area becomes more limited, precluding the development of new regionally significant sites, as noted by SGS Economics and Planning (Southern Tasmania Industrial Land Strategy, 2013).
- 14 There is no apparent need for additional industrial land zoned for industry to be delivered in the foreseeable future.
- 15 Potential may exist to rezone some GIZ land to LIZ given the current limited supply of land in the LIZ (6.8ha). Although the need for this to occur is uncertain given the apparent suitability GIZ land to accommodate surplus LIZ demand.
- 16 Council should seek to encourage consolidated industrial land use patterns and efficient use of land in the Brighton Industrial Estate, noting that evidence of some fragmentation and inefficient use currently exists.