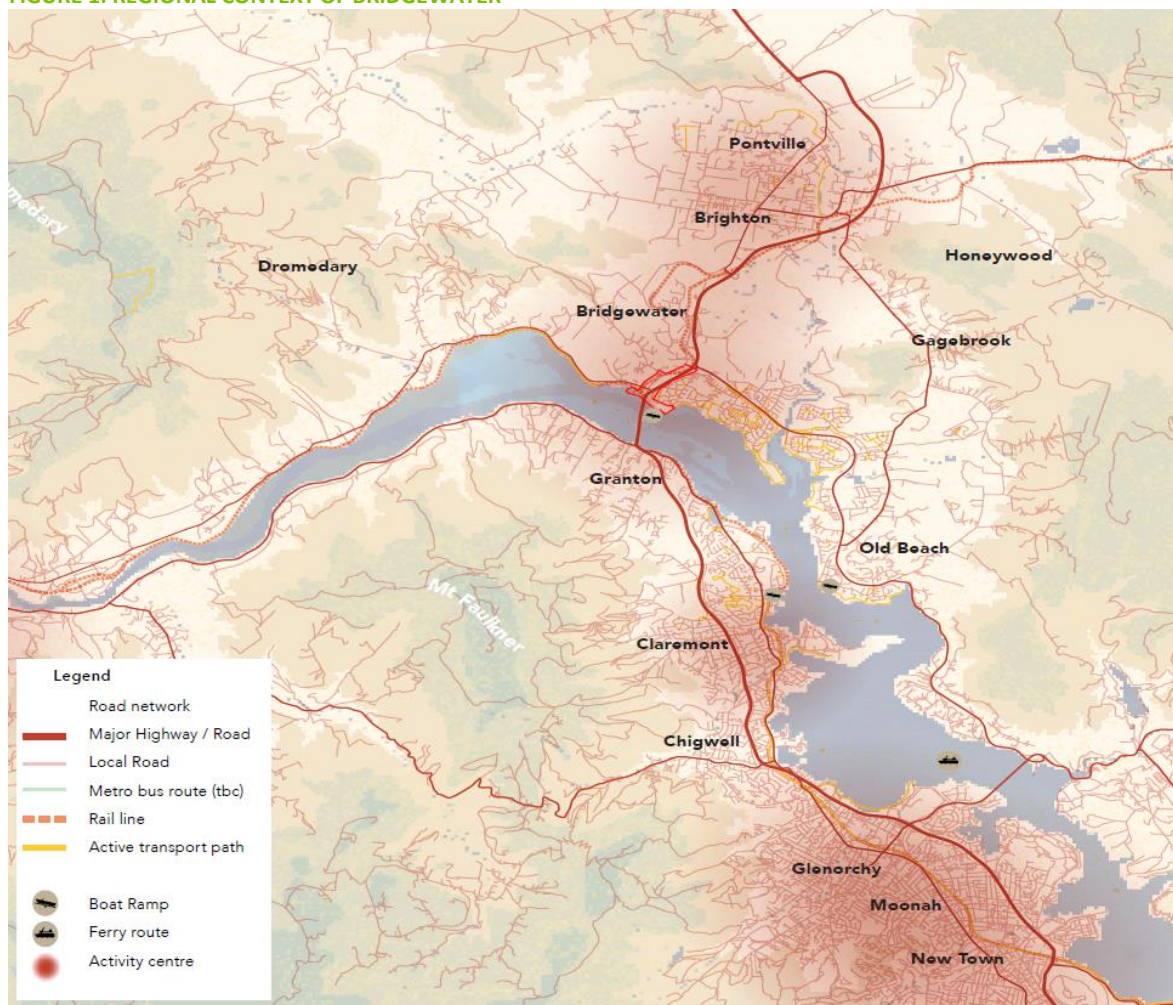# Memo - Supportable floorspace assessment Brighton Masterplan

In June 2023, SGS Economics & Planning was engaged to undertake a high level retail and community infrastructure floorspace demand appraisal. The study area is shown below.

FIGURE 1: REGIONAL CONTEXT OF BRIDGEWATER

Source: Bridgewater Waterfront Masterplan

1.1 Study area context

Bridgewater Bridge Northern Interchange Precinct Masterplan, 2023

The Bridgewater Master Plan is a "high-level, long-term framework, intended to guide the physical transformation of the Waterfront and Interchange Precinct and achieve the vision, principles, and

structuring ideas". The Masterplan is a visionary document that re-imagines the precinct as a place where the community can thrive. To realise this vision, the Masterplan is guided by six over-arching principles:

1. Celebrating the water's edge

2. Connecting thriving open spaces for people and nature

3. Encouraging safe movement and transport access

4. Revealing the Bridgewater community cultural stories

5. Designing a distinctive public realm that harnesses the local character

6. Supporting and generating a mixed-use centre

The plan proposes a rezoning of the rural living zone in the northern region of the precinct, with the transformation of redundant utilities land being transformed into open space. Further utilities zoned land will be converted to Urban Mixed-Use zone to support the creation of medium density residential development and a commercial high street. The Council depot is proposed to be rezoned to Community Purpose use, unlocking land for future community services. Further research will determine additional uses for remaining utilities land, with specific plans to be developed for the dominant land uses.

The plan also stated that the Masterplan area is well positioned to achieve 30% growth with optimisation of council land for community benefit. The area is noted to be well positioned to serve growing population and industry requirements across Brighton. This is bolstered by plans for multi-modal connectivity to encourage active and public transport.

The Bridgewater Waterfront Masterplan proposes six actions for land use in order to support generating a local mixed-use centre

1. The area of rural living zone to the west of the precinct will be converted to General Residential Zone. This will encourage density supported by the mixed use precinct of old main road.
2. Redundant land zoned Utilities is converted into Open Space to create a connected open space along the river's edge.
3. Land which is zoned Utilities is converted to Urban Mixed Use. This will support the creation of a commercial high street and medium density residential development.
4. The Council depot which zoned Light Industrial is rezoned to Community Purpose Use. It will unlock land for future community reserves
5. Investigate rezoning of Utilities land for public open space to support future community needs
6. Investigate the creation of a Specific Area Plan within the study area which implements the precinct's urban design elements and land use in accordance with the Masterplan.

FIGURE 2: BRIDGEWATER WATERFRONT LAND USE ACTION AREAS

Source: Bridgewater Waterfront Masterplan

1.2 Planning Context

Resource Management and Planning System

The Resource Management and Planning System (RMPS) was established in 1994 to achieve sustainable outcomes from the use and development of Tasmania's natural and physical resources. Objectives of the RMPS are to:

promote the sustainable development of natural and physical resources and the maintenance of ecological processes and genetic diversity;

- provide for the fair, orderly and sustainable use and development of air, land, and water;
- encourage public involvement in resource management and planning;
- facilitate economic development in accordance with the objectives set out above; and
- promote the sharing of responsibility for resource management and planning between the different spheres of Government, the community and industry in the State.

Local Government Act 1993

The Local Government Act 1993 establishes the powers and functions of councils in Tasmania to plan for, develop and manage municipal areas in the interests of their communities. It provides a broad overview and is supported by more than 20 other additional pieces of legislation. The Act requires councils to prepare a 10-year strategic plan in consultation with the community, to work towards long term visions.

Southern Tasmanian Regional Land Use Strategy, 2010 – 2035 (2020 update)

This is a broad policy document that outlines strategies to reorient the state's land use planning system to more sustainable approaches to tackle modern challenges. It highlights the importance of Activity Centres as places that provide essential services, employment and social interactions in cities and towns. Brighton LGA falls within the study area, with Bridgewater having been identified as a **Major Activity Centre**, requiring it to provide for a wide range of services and facilities to serve the surrounding subregion, with a particular focus on the retail and commercial sector.

The wider residential development areas planned for Greater Hobart are detailed in Figure 3 below. The study site sits within an identified Greenfield Development Precinct.

FIGURE 3: RESIDENTIAL DEVELOPMENT AREAS, GREATER HOBART
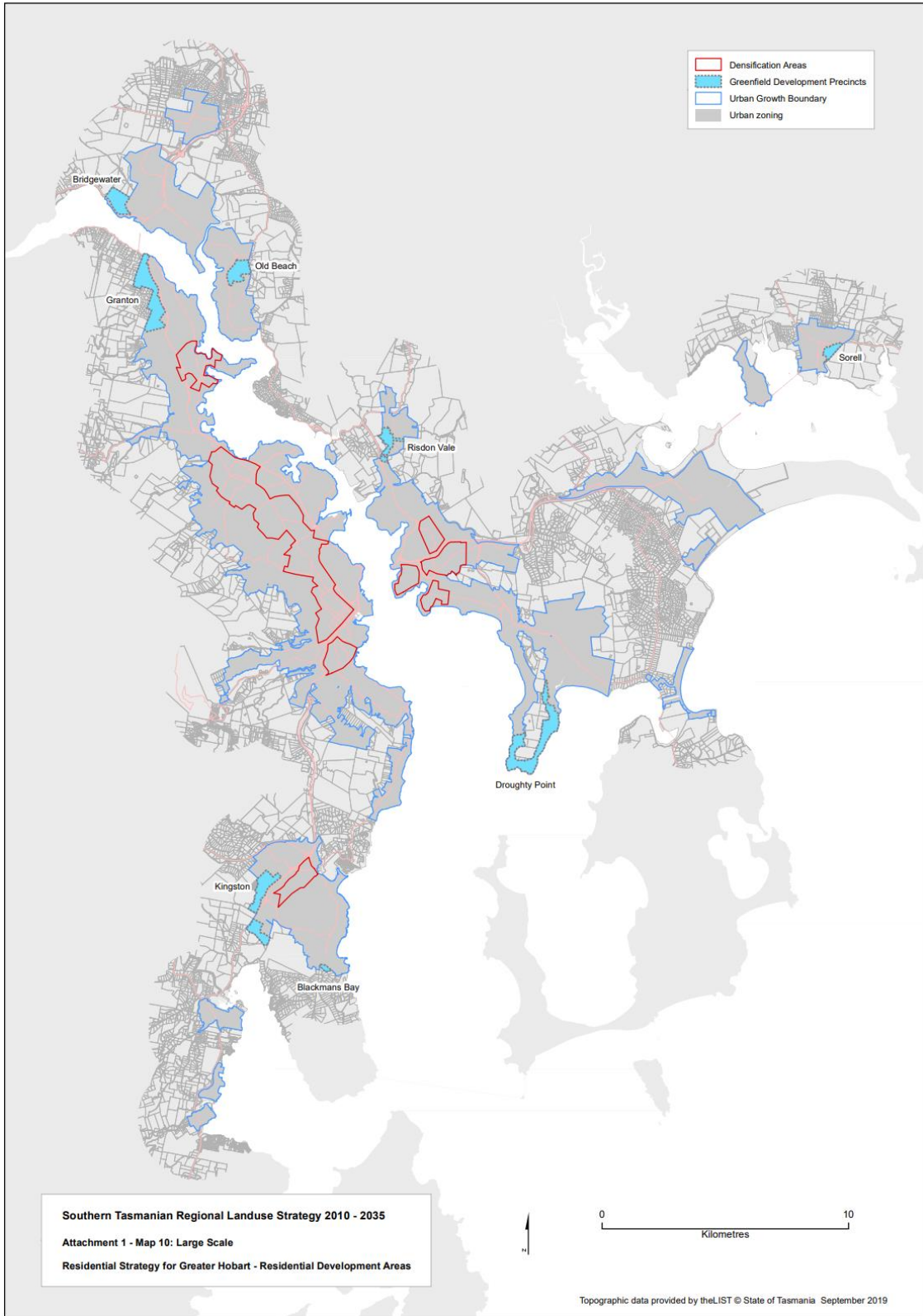
Source: Southern Tasmanian Regional Land Use Strategy

2. Retail modelling

2.1 Methodology

The shift-share model approach is a simplified method to estimate retail demand within a defined trade area or geography.

This model uses the following broad tasks:

1. Define the trade area around the subject site based on retail expenditure patterns: the boundary should be drawn so that the area is fairly self-contained, that means there will be limited expenditure inflows (from expenditure outside the trade area to inside the trade area).

   - The Bridgewater Bridge Northern Interchange Precinct Masterplan reimagines the Bridgewater Waterfront as a place where community can thrive, supporting it to become a mix-used centre. It is strategically located at the junction of commercial, industrial, and residential uses, and connected with multiple transport routes. There are nearby alternatives for commercial and retail uses such as to the northeast in Brighton, and across the Derwent River in Glenorchy. Therefore, the trade area has been determined to consist of new residents to the area who take up residence in the developed housing.

2. Combine expenditure per capita data with population projections for the trade area to estimate future retail expenditure in the trade area.

   - The estimates consider escape expenditures, including to online expenditure.

3. Divide expected expenditure for the trade area by a Retail Turnover Density (RTD), or floorspace to expenditure ratios, to estimate the amount of retail floorspace required to cater to the projected future expenditure.

   - The RTD varies by retail category and is based on Urbis Shopping Centre data from 2018 (per capita expenditure was adjusted to account for price inflation). Based on past retail market performance and trends in retail, it was further assumed RTDs are expected to become and assumed 1 per cent per year 'less efficient' over time, as a result of a) new market entrants, b) increased competitiveness, and c) online retail expenditure capture. As such, RTDs are expected to grow at 2 per cent, which is less than inflation.

While the assumptions outlined above are robust, some are not location dependant and are high-level in nature.

2.2 Inputs and assumptions

Trade area

A given trade area for a retail demand analysis can comprise multiple catchments, which have unique spending assumptions applied. An important assumption of this study is that supportable retail floorspace will need to come from the additional residents. This will ensure that existings retails centres are not compromised.

The primary catchment for this precinct has been determined to be the new residents of the residential development that occurs within the precinct. The precinct is shown in Figure 4**Error! Reference source not found.** below, with developable land in the primary trade area shown in purple, covering a total 76,913m^2. Of this, 19,048m^2 will be subject to Actions 3 and 4 from the Bridgewater Waterfront Action Plan, meaning higher density dwellings, such as low to mid-rise apartments of no less than three storeys will be able to be developed on this land. The remaining land is subject to Action 6, meaning lower density dwellings such as townhouses or walk-up apartments can be developed here. SGS has made a series of density assumptions regarding these two categories of land parcels, which determine the number of dwellings and therefore people that can fit into the precinct and thus, the trade area.

The area in pink to the west of Midland Highway comprises 144 hectares of land, 57 of which are zoned Future Urban, while the other 87 hectares are zoned Rural Living. Action 1 from the Bridgewater Waterfront Masterplan involves the rezoning of these 144 hectares to General Residential, which would form a secondary catchment for the new precinct. The matrix for forming the assumptions for dwelling density for each action area are shown in   below.

FIGURE 4: DEVELOPABLE RESIDENTIAL LAND WITHIN THE BRIDGEWATER WATERFRONT PRECINCT

Source: Realm

FIGURE 5: DWELLING DENSITY ASSUMPTIONS

		Detached			Semi-detached			Apartment			
	Site Density (dwellings per hectare)	< 10	10 - 15	15 - 20	20 - 30	30 - 40	40 - 60	60 - 100	100 - 200	200 - 400	> 400
	Land consumed per dwelling (sqm)	< 1,000	670 - 1000	500 - 670	330 - 500	250 - 330	170 - 250	100 - 170	50 - 100	30 - 50	> 30
Detached	VERY LOW DENSITY DETACHED — Typical lot size: > 2,000 sqm										
	LOW DENSITY DETACHED — Typical lot sizes: 1,000 to 2,000 sqm										
	DETACHED — Typical lot sizes: 500 to 1,200 sqm										
	SMALL LOT DETACHED — Typical lot sizes: 300 to 600 sqm										
Attached	'VILLA' — Typically 1 - 2 storey detached										
	'TOWNHOUSE' — Typically 1 - 3 storey attached										
Apartments	'WALK UP' APARTMENT — Typically 2 - 3 storey apartment										
	LOW-RISE APARTMENT — Typically 4 - 8 storey apartment										
	MID-RISE APARTMENT — Typically 9 - 15 storey apartment										
	HIGH-RISE APARTMENT — Typically 15 storeys of over										
	MIXED USE DEVELOPMENT — Varies with height and mix										

Source: SGS Economics & Planning (2023)

SGS has elected to provide a range of dwelling density assumptions based on   above, as the masterplan is not prescriptive of exactly the type of housing that will be developed within the precinct. "Optimistic" implies a higher density, whereas "pessimistic" implies a lower achieved density.

TABLE 1: TRADE AREA DWELLING DENSITY ASSUMPTIONS, DWELLINGS PER HECTARE

Masterplan Action area	Pessimistic	Optimistic
3	100	150
4	100	150
6	60	80
1	20	30

Source: SGS Economics & Planning

The dwelling density assumptions were then applied to the action plan areas to determine the potential new numbers of dwellings. This ranges from between 826 to 1,181 new dwellings across both the primary and secondary catchments.

TABLE 2: PRIMARY AND SECONDARY CATCHMENTS, NUMBER OF NEW DWELLINGS

Masterplan Action area	Parcel area (sqm)	Catchment	Pessimistic	Optimistic
3	11,528	Primary	115	173
4	7,520	Primary	75	113
6	57,865	Primary	347	463
Primary Total	76,913	Primary	538	749
1	144,000	Secondary	288	432
Total	220,913		826	1,181

Source: SGS Economics & Planning

The catchment area population will therefore be determined by the number of people in each of the new dwellings developed in the primary and secondary catchments.

Total estimated population range

The average household size in Brighton is 3.1[1], which is the same as the national average, but higher than the 2.9 average for Tasmania. However, given that the residential development in the primary catchment will predominantly be in the form of multi-storey apartments, where lone person households and other smaller household types would be overrepresented, a lower average household size to determine the primary catchment population was estimated. This was calculated by taking the number of residents in apartments in Tasmania (21,176[2]) and dividing by the number of apartments in Tasmania (11,575[3]), to arrive at an average household size of 1.82. For the secondary catchment, a lower dwelling density has been assumed and therefore, the average household size for Brighton was deemed appropriate for development in this area.

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[1] https://abs.gov.au/census/find-census-data/quickstats/2021/IQSLGA60410

[2] 2021 Census - counting dwellings, place of enumeration, STRD dwelling structure

[3] https://www.abs.gov.au/census/find-census-data/quickstats/2021/6

TABLE 3: PRIMARY AND SECONDARY CATCHMENTS, POPULATION

Catchment	Average household size	Pessimistic	Optimistic
Primary	1.82	984	1,370
Secondary	3.10	893	1,339
Total		1,876	2,709

Source: SGS Economics & Planning

Expenditure assumptions

Per-capita expenditure is based on the Marketinfo dataset at the SA1 level for the defined trade area. This data provides average expenditure for 2016 per person for the SA1s within the defined trade area, across multiple retail categories. To adjust for price inflation, the expenditures were indexed against CPI and projected forward for the years from 2016 to 2042. The assumed indexation is 3 per cent per year from 2016 to 2042[4].

MarketInfo provides expenditure on the categories of:

- Food and Groceries
- Bottleshop and Tobacco
- Restaurants & Cafes and Take-away
- Clothing and Shoes
- Furniture, Whitegoods, Homeware, Manchester, and Electronics
- Hardware and Garden
- Other Retail
- Retail Services

Expenditure capture and leakage

Due to Brighton being within Greater Hobart a level of escape expenditure, or percentage of spending that is not fully captured from the resident population, was assumed. The escape expenditure typically involves higher order spending (such as furniture and white goods) and spending by Brighton residents working in other LGAs in Greater Hobart. There are several alternatives for consumers, given that the proposed precinct is at the junction of three LGAs, Brighton, Derwent Valley, and Glenorchy. Glenorchy in particular, has a retail and commercial precinct nearby, and therefore, the LGAs on the opposite side of the Derwent River have not been included in the catchment area. However, for residents of Brighton, having to cross Bridgewater Bridge for a retail and commercial precinct such as the one in Glenorchy, would limit leakage to the other side of the river. The centre of Brighton is an existing activity centre with residential and commercial uses intersecting. For these reasons, the secondary catchment expenditure capture was assumed to be half that of the primary, given the proximity of other retail precincts.

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[4] Average CPI for Hobart between September 2016 and March 2023 (ABS Consumer Price Index 6401.0, 2023) is 3.2%. 3% inflation is used as an appropriate approximation, due to being within the RBA inflation target band.

TABLE 4: CAPTURE EXPENDITURE

Retail Category	Capture Expenditure 2033		Capture Expenditure 2042	
	Primary	Secondary	Primary	Secondary
Food & Groceries	60%	30%	70%	35%
Bottleshop and Tobacco	60%	30%	70%	35%
Restaurants and Cafes & Take-away	40%	20%	50%	25%
Clothing and Shoes	15%	7.5%	25%	13%
Furniture, Whitegoods, Homeware, Manchester, and Electronics	7%	3.5%	17%	8.5%
Hardware and Garden	7%	3.5%	17%	8.5%
Other Retail	40%	20%	50%	25%
Retail Services	50%	25%	60%	30%

Source: SGS Economics and Planning (2023)

Retail turnover densities

The term retail turnover density (RTD) refers to retail turnover by per square meter by retail type, or the ease with which retailers can generate expenditures from a given quantity of floor space. RTDs used in the analysis are based on Urbis shopping centre data from 2018. For RTD retail assumptions, supermarket based shopping centre RTD has been used, which is consistent with the current retail offering within Brighton.

RTDs are factored to grow at 2 per cent per annum from 2018, which assumes turnover densities become 'less efficient' over time, as a result of a) new market entrants, b) increased competitiveness, and c) online retail expenditure capture (see below). The RTD growth rate is lower than inflation to reflect retail floorspace becoming less efficient. This lower efficiency is expressed as a 1 per cent gap between the expenditure increase and the RTD increase.

Online vs instore expenditure

Online retailing is becoming increasingly prominent in Australia, with the volume of Australians' retail expenditure being directed online growing strongly in recent years. As online retailing becomes more common, expenditure will be drawn away from physical retail centres.

Table 5 outlines the online retail share of total expenditure for the trade area. ABS Online retail shares were used to derive the on-line capture of total expenditure. In addition to is assumed that the market share of online expenditure will increase 1 per cent a year. Food categories were applied to Food and Grocery, Bottle shops and Tobacco, and hospitality, while non-food online expenditure share was applied to all other categories.

TABLE 5: ONLINE RETAIL SHARE

Year	Food	Non-Food
2023	5.60%	16.6%

2026	5.77%	17.06%
2030	6.00%	17.75%
2035	6.31%	18.65%
2040	6.63%	19.60%
2042	6.77%	20.00%

Source: ABS (2023) and SGS Economics and Planning (2023)

2.3   Results

From 2022 to 2042, retail floorspace demand will increase considering the primary and secondary catchments, however this will only begin once development of the precinct is complete, assumed to be 10 years from now, in 2033. Table 6 outline the broad results, showing 1,783 sqm and 1,251 sqm of additional retail floorspace demand in 2042 for the optimistic and pessimistic scenarios respectively. A further breakdown of the retail category demands is outlined in Appendix A.

TABLE 6: TOTAL ADDITIONAL RETAIL DEMAND, SUMMARISED

Year	Total new retail floorspace demand (sqm)	
	Optimistic	Pessimistic
2033	126	88
2038	947	678
2042	1,783	1,251

Source: SGS Economics and Planning (2023)

3. Community infrastructure requirements

3.1 Future opportunities

The Brighton Social Infrastructure Plan[5] details several place-based priority actions across the council area, including at Bridgewater. Interventions with relevance to the study area are bolded:

- **BW01: Continue to consolidate Bridgewater as a community services core through accessibility and transport. Consider existing town centre and social infrastructure hub created by Brighton Civic Centre, Linc, and shopping opportunities in the existing town centre. Consider opportunities to utilise commercial space for a work Hub.**
- **BW02: invest in community facilities, open space and local cultural opportunities along urban release areas to the west of the Midland Highway.**
- BW03: recreation infrastructure on existing parkland and ensure a full range of infrastructure types are provided.
- BW04: renew half court at 6-8 Bowden Drive.
- BW05: Renew "Warruga Park" and upgrade "Gunn St Park".
- BW06: Develop Bridgewater Parklands in line with the existing masterplan including the sewerage treatment plant as commercial, medium density infill occurring on the Eastern Edge.
- BW07: Incorporate additional recreation opportunities into the Bridgewater Parklands, particularly at the sewerage treatment plant.
- **BW08: Advocate for significant public open space to be included in the Bridgewater redevelopment, replace existing small playground at Nielsen Esplanade.**
- BW09: support Bridgewater's Hobart Gymnastics Association through council building ownership, consider facility upgrades.
- **BW10: undertake engagement with Aboriginal community to ensure adequate representation in new infrastructure.**

Implications

There are existing social services near Green Point that will be enhanced and expanded, but the spatial barriers created by the Midland Highway and rail line may mean that additional social services will need to be provided within the immediate vicinity. Some ground floor commercial floorspace could be utilised as a "work hub".

3.2 Floorspace requirements – case studies

Based on the review of the Brighton Social Infrastructure Plan, the additional community infrastructure to be provided within the study area will likely be flexible floorspace that can serve as a series of

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[5] https://www.brighton.tas.gov.au/wp-content/uploads/2023/05/Brighton-Social-Infrastructure-Plan_Final_March-2023.pdf

meeting rooms and space for various community services and programs. Several examples have been considered across Greater Hobart.

Huon Valley Hub

Examples include the Huon Valley Hub[6] and provides the following programs and activities:

- Community health and wellbeing programs;
- Parenting programs;
- Demonstrations or tasters (fitness, nutrition, art etc.);
- Targeted community programs (positive ageing/youth);
- Outdoor markets, live entertainment and art exhibitions;
- Harm prevention and awareness;
- Community consultations;
- Training courses, workshops and information sessions;
- Artists in residence; and
- Committee and network group meetings.

Across around **250 sqm** of floorspace[7], the following facilities are provided:

- Lounge area for informal meetings;
- Meeting/workshop rooms with audio visual equipment;
- Toilet, baby change table and kitchenette;
- Exhibition opportunities;
- Open-plan space for presentations and small events; and
- Neighbouring green space (approx. 500sqm).

Kingborough Community Hub

The Kingborough Community Hub is a flexible facility that includes the following amenities:
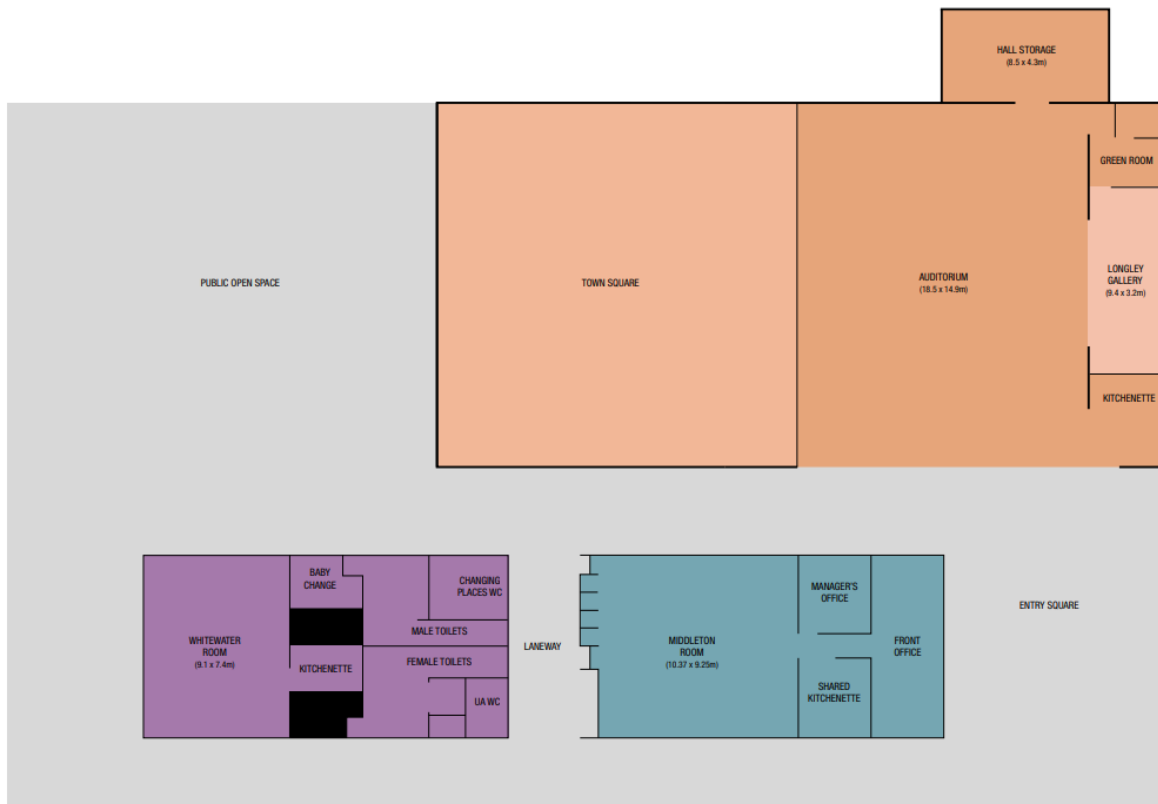
- Multi-purpose community hall
- Meeting rooms
- Covered town square
- Public amenities
- Storage
- Café.

Across multiple uses, there is up to **1,000 sqm** of usable floorspace in the hub, as shown in Figure 6 below.

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[6] https://www.huonvalley.tas.gov.au/services/my-community/hvhub/
[7] Estimated ground floor area based on desktop review, measured using Google maps, July 2023.

Source: Kingborough Community Hub floorplan[8]

Multicultural Council of Tasmania Community Hub

The Multicultural Council of Tasmania Community Hub[9] provides meeting spaces and a function room, aiming to serve community and cultural groups across Greater Hobart. Meeting spaces can include approximately 100 people, and includes a large multi-purpose room, a conference room, along with kitchen and bathroom facilities. The total area is approximately **100 sqm**.

3.3   Spatial considerations

In consideration of the Brighton Social Infrastructure Plan and the desktop review of potential options for flexible community floorspace, there is likely a requirement for between 100-1,000 sqm of flexible community floorspace that can be accommodated within the study area at the ground floor.

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[8] https://www.kingborough.tas.gov.au/wp-content/uploads/2023/06/Final-Floor-Plan.pdf
[9] https://mcot.org.au/hiring-information/

The exact allocation of this will depend on the provision of residential buildings and a calibration to local community requirements. Community floorspace would also compliment the existing commercial offer and improve activation of the street for non-residents.

4. Recommendations

4.1 Summary

There are a range of potential outcomes for the subject site. The results of the retail modelling, when considering the likely population growth, show anywhere between 1,250 and 1,780 sqm of supportable retail floorspace.

The supportable community facilities, based on the information provided, should be a flexible set of meeting rooms and spaces that are flexible enough to accommodate multiple community services. These can take many forms and can range from as little as 100 sqm to 1,000 sqm.

An assessment of the masterplan area reveals that there is more than enough room to accommodate this at Table 2, there is around 11,000 of land area dedicated to the urban mixed use zone. Even with a considerable proportion of land dedicated to open space at the parcels, there is still significant flexibility in accommodating the commercial and community facilities at the ground floor within logical locations.

4.2 Developing a successful economic precinct

The transformation of this area is a long-term vision. Economic demand will depend on a layering of land types and uses being provided, catalysing further activity. This can be shown in Figure 7 below.

FIGURE 7: URBAN ECONOMIC DEVELOPMENT LIFECYCLE OF A NEW COMMUNITY
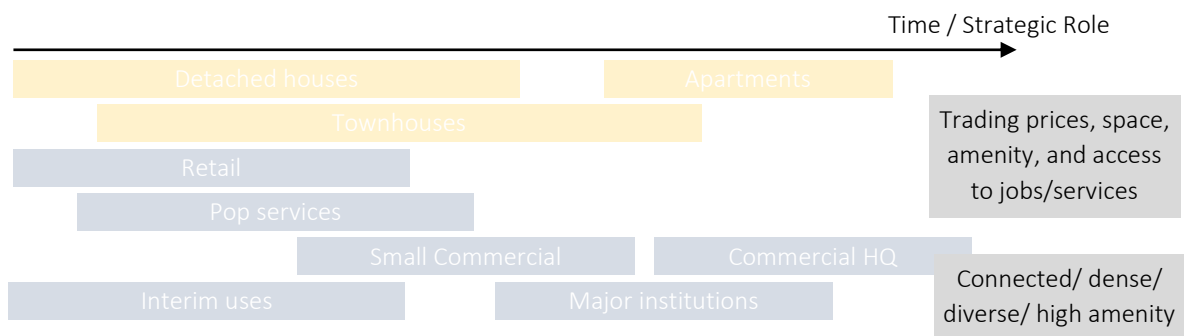
Source: SGS Economics and Planning (2022)

Successful economic precincts have several attributes that indicate highly productive places which generate new investment and jobs and attract new businesses. The development of employment locations is driven by a range of factors associated with the amount, location and attributes of land supply, and demand drivers of various employment industries. Successful employment locations often receive significant government leadership and coordination to stimulate appropriate business and development. Precinct success factors can be promoted and enhanced to attract more investment and business. The factors which drive economic success are depicted in Figure 8.

Source: Department of Environment, Land, Water and Planning

These key success factors are further discussed below:

- **Competitive advantage**: Is the precinct leveraging and aligning its distinctive assets, including historical strengths, to grow firms and jobs in the district, city and region? For example, Hobart has a strong IT and creative industries presence. Firms in those industries located in Hobart will gain economic benefits from locating there. What are the key comparative advantages found in the masterplan area? Are they being leveraged to support activity within the precinct?

- **Collaboration**: Is the precinct connecting the dots between people, institutions, economic clusters, and place, creating synergies across multiple scales and platforms?

- **Quality of place**: Does the precinct have a strong quality of place and offer quality experiences that accelerate outcomes and increase interactions? Success is based upon factors such as the urban environment and the presence of places to interact (restaurants and cafes) and the level of mix of uses which helps to provide a 'buzz' inside and outside of standard office hours.

- **Diversity and inclusion**: Is the precinct a diverse and inclusive place that provides broad opportunities for residents?

- **Affordability**: Does the precinct provide a diversity of affordable premises for business to locate in? This would include start-ups, small, medium sized business and larger businesses.

- **Critical mass**: Does the area under study have a density of assets that collectively begin to attract and retain people, stimulate a range of activities and increase financing?

- **Infrastructure**: Does the precinct have the necessary utilities, ICT infrastructure and building stock to accommodate critical mass and support connectivity, collaboration and innovation? What is the type and quality of the building stock?

- **Accessibility**: Does the precinct have access to deep pools of labour and other firms? This has been assessed based on the number of jobs and workers accessible by car and public transport during the AM peak. The higher the number of jobs accessible, the greater the connection of the enterprise precinct to the broader economy of Melbourne. The higher the access to workers, the better the connection is to a large labour force. Both the connection to other jobs and workers will enhance the economic performance of the enterprise precinct.

- **Anchor institutions**: Does the precinct have anchor institutions, such as research organisations or large corporates, that are present, relevant and engaged with industry?

4.3   Recommendations

In short, the additional population will support demand for additional commercial floorspace and allow for the provision of additional cultural facilities. The overall success of this precinct will largely depend on ensuring that there are the key ingredients to success.

Appendix A: Expanded retail modelling results

TABLE 7: DETAILED RETAIL DEMAND TOTAL, OPTIMISTIC SCENARIO

Year	Food and Groceries (sqm)	Bottleshop and Tobacco (sqm)	Restaurants and Cafes & Take-away (sqm)	Clothing and Shoes (sqm)	Furniture, Whitegoods, Homeware, Manchester, and Electronics (sqm)	Hardware and Garden (sqm)	Other Retail (sqm)	Retail Services (sqm)	Total (sqm)
2022	0	0	0	0	0	0	0	0	0
2023	0	0	0	0	0	0	0	0	0
2024	0	0	0	0	0	0	0	0	0
2025	0	0	0	0	0	0	0	0	0
2026	0	0	0	0	0	0	0	0	0
2027	0	0	0	0	0	0	0	0	0
2028	0	0	0	0	0	0	0	0	0
2029	0	0	0	0	0	0	0	0	0
2030	0	0	0	0	0	0	0	0	0
2031	0	0	0	0	0	0	0	0	0
2032	0	0	0	0	0	0	0	0	0
2033	56	21	17	6	8	3	10	6	126
2034	116	43	35	12	19	6	20	13	264
2035	180	66	54	20	34	11	31	20	416

2036	247	91	75	29	51	16	43	28	580
2037	317	117	97	38	72	23	56	36	757
2038	392	144	121	49	97	30	70	44	947
2039	470	173	146	62	124	39	84	53	1,152
2040	552	203	173	75	156	49	100	63	1,370
2041	638	235	202	89	190	59	116	72	1,602
2042	711	261	224	99	212	66	129	81	1,783

Source: SGS Economics and Planning (2023)

TABLE 8: DETAILED RETAIL DEMAND TOTAL, PESSIMISTIC SCENARIO

Year	Food and Groceries (sqm)	Bottleshop and Tobacco (sqm)	Restaurants and Cafes & Take-away (sqm)	Clothing and Shoes (sqm)	Furniture, Whitegoods, Homeware, Manchester, and Electronics (sqm)	Hardware and Garden (sqm)	Other Retail (sqm)	Retail Services (sqm)	Total (sqm)
2022	0	0	0	0	0	0	0	0	0
2023	0	0	0	0	0	0	0	0	0
2024	0	0	0	0	0	0	0	0	0
2025	0	0	0	0	0	0	0	0	0
2026	0	0	0	0	0	0	0	0	0
2027	0	0	0	0	0	0	0	0	0
2028	0	0	0	0	0	0	0	0	0
2029	0	0	0	0	0	0	0	0	0
2030	0	0	0	0	0	0	0	0	0
2031	0	0	0	0	0	0	0	0	0
2032	0	0	0	0	0	0	0	0	0
2033	39	14	12	4	6	2	7	4	88
2034	82	30	25	9	14	4	14	9	188
2035	128	47	38	14	24	8	22	14	296
2036	176	65	53	20	37	11	31	20	414
2037	227	83	69	27	52	16	40	26	541
2038	280	103	86	35	69	22	50	32	678

2039	337	124	105	44	89	28	60	38	824
2040	396	145	124	54	111	35	71	45	981
2041	457	168	144	64	136	43	83	52	1,148
2042	499	183	157	70	148	46	90	57	1,251

Source: SGS Economics and Planning (2023)