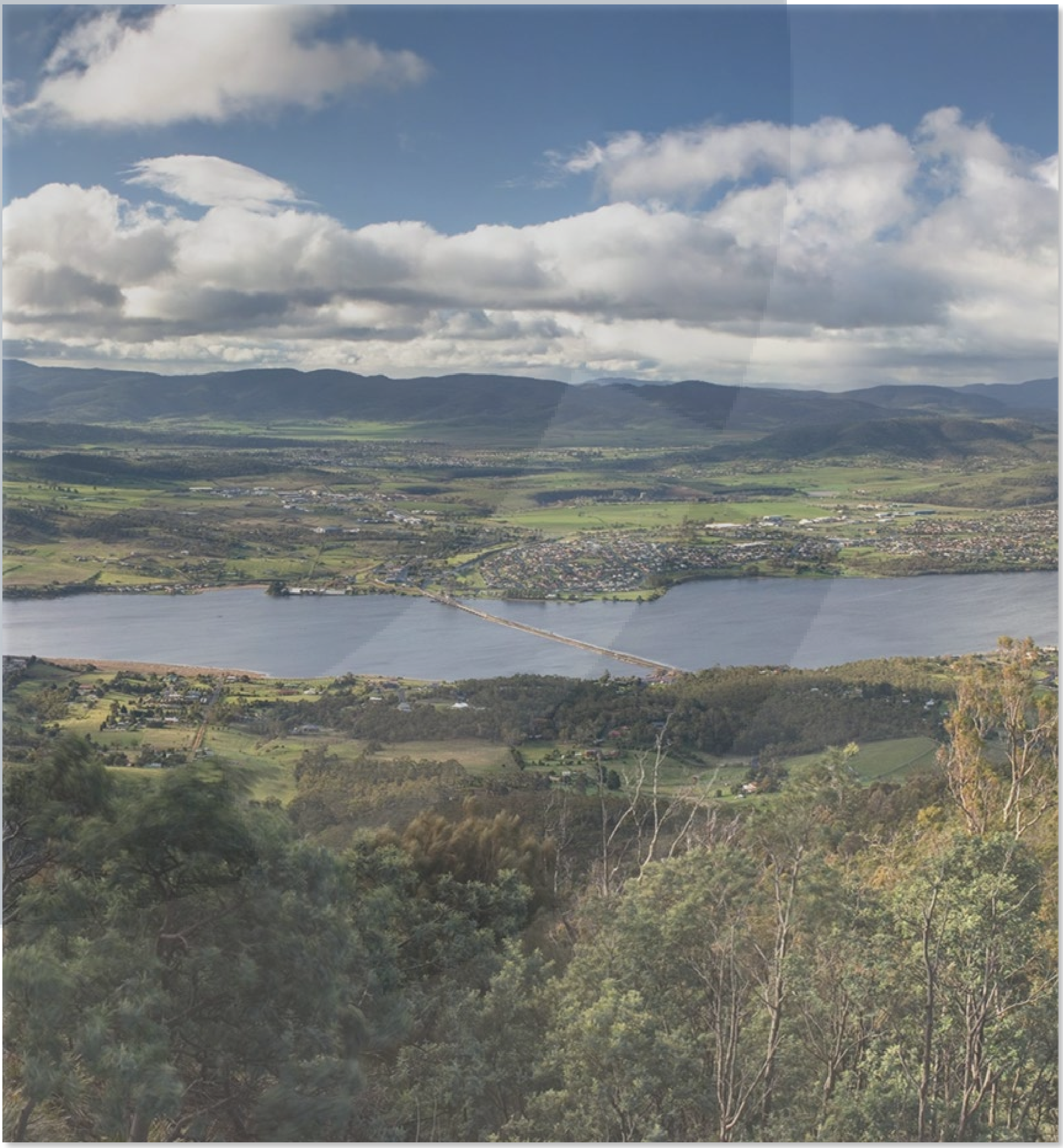

Brighton Activity Centre Strategy

BACKGROUND REPORT

12 June 2025

Prepared by

Geografia mesh

Prepared for

Brighton going places

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The front cover image, featuring Bridgewater, Gagebrook, and Brighton suburbs, along with the Derwent River, is by Australian photographer John Harrison.

Executive Summary

INTRODUCTION

- This Report is the first deliverable on the development of the Brighton Activity Centre Strategy.
- The Brighton Activity Centre Strategy will be a framework for guiding planning, economic development and investment decisions for Brighton Council's activity centres.

STRATEGIC CONTEXT

- Brighton Council in Southern Tasmania has its development shaped by the existing commercial activities and their potential. Development direction is guided by a large set of local, regional and State policies that have a significant range of objectives. Moreover, some are under review.
- Consideration should be given to how general economic conditions and these documents and objectives will influence outcomes for Brighton's activity centres.

ECONOMIC & DEMOGRAPHIC CONTEXT

- An analysis of the economic and demographic characteristics of Brighton Council and its surrounds suggests that, while historical and forecast job growth may be modest, population growth has been and will likely continue to be higher than expected.
- While Brighton and Bridgewater suburbs have both local and regional service centre roles, Glenorchy, Hobart and Moonah are important consumer expenditure destinations for Brighton Council residents.
- Most notably, in terms of Resident Escape Spend, bulky goods may represent a development opportunity.

LAND USE NEEDS ANALYSIS

- The estimated 19,876 sqm of retail and 2,160 sqm of commercial floorspace in Brighton Council broadly matches current floorspace demand.

- Demand is expected to exceed supply as early as 2026 in some locations and, more significantly, in the early 2030s (in both retail and office space).
- The potential exists for supermarkets (in Brighton and Old Beach suburbs), bulky goods (in the LGA) and some recapture of the relatively high level of Resident Escape Spend (particularly in Old Beach) (Figure A).

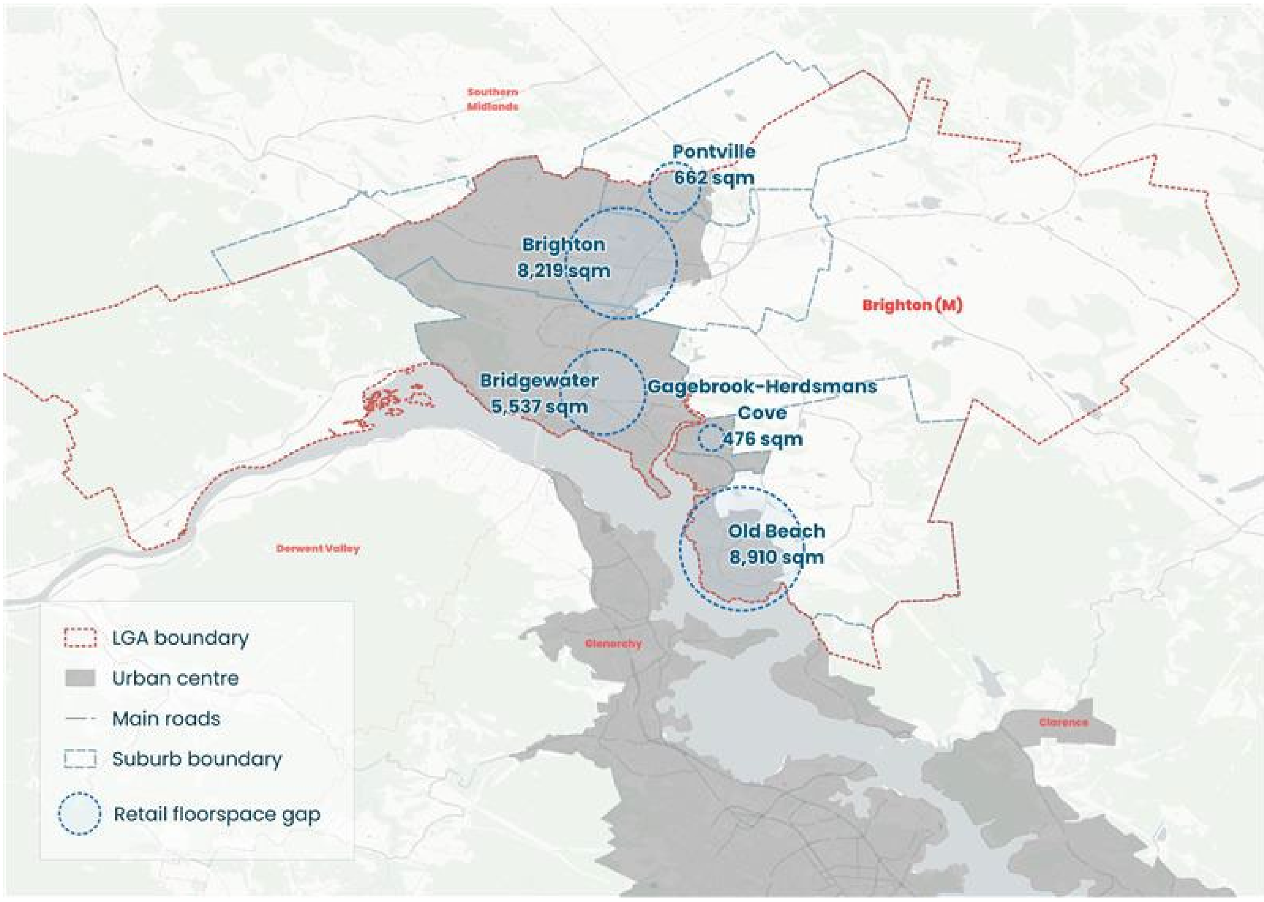

Figure A: Aggregated Retail Floorspace Needs (Gaps) by 2046
Source: Geografia, 2024

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1.0 Introduction

This Report is the first deliverable on the development of the Brighton Activity Centre Strategy. It will be re-issued with additional material subsequent to the completion of a consultation phase. The Brighton Activity Centre Strategy will provide a framework to guide planning, economic development and investment decisions for Brighton Council's activity centres.

1.1 PROJECT OBJECTIVES

This project was commissioned to prepare the Brighton Activity Centre Strategy. The Strategy will provide an overarching framework to inform planning and land use decisions for the City's activity centres. Specifically, it seeks to:

- Translate regional land use strategies [1] for the Brighton Council (referred to as Brighton (M) [2] henceforth) context
- Provide strategic guidance to inform planning, economic development and decision-making about activity centres in Brighton (M)
- Assist the Council's activities in attracting, directing, advocating for, and guiding investment that will support these local centres.

The overall goal of the Strategy is to support the full realisation of each centre's role and function; and build on a local sense of place by directing the growth, renewal and revitalisation of each centre.

1.2 THIS REPORT

This background report is the first deliverable of the project. It outlines the findings of a retail and economic assessment and a review of strategic policy. These outputs will support the forthcoming consultation process, after which options and recommendations for each of Brighton's activity centres will be prepared. The report includes:

- A review of the existing strategic and policy context

[1] The Southern Tasmania Regional Land Use Strategy (STRLUS).

[2] To distinguish between the municipality and the locality of Brighton, we denote Brighton Council as Brighton (M) and Brighton suburb as Brighton (S).

- Employment forecasts
- Retail catchment analysis and forecasts
- Retail commercial and employment needs analysis
- Land use analysis
- An analysis of size, location and offering of activity centres.

Once the consultation is complete, this report will be reissued and include:

- Recommendations for the Activity Centre Hierarchy
- Recommendations for Planning Scheme Amendments
- An overview of the consultation approach and findings
- A detailed plan and the Implementation Strategy.

1.3 STUDY CONTEXT: REGIONAL POLICY DRIVERS

Two region-wide policies and projects have had a bearing on the development of this Study. These are described here, along with the response to them.

1. The Southern Tasmania Regional Land Use Strategy (STRLUS)

The Brighton Activity Centre Strategy falls under the Southern Tasmania Regional Land Use Strategy (STRLUS). The STRLUS is a regional policy document initially ratified in 2010 and amended in 2013. Its intention is to facilitate and manage change, growth, and development in Southern Tasmania out to 2035.

The STRLUS sets out the activity centre planning hierarchy for Greater Hobart and its surroundings. This provides a framework for local governments to adhere to that is consistent with sustaining the overall vibrancy of retail land uses in the region.

Since 2013, population growth, and changing economic and social conditions have altered the Southern Tasmania region. The City of Brighton has seen some of the highest levels of resident population growth in Southern Tasmania.

In response to broader planning reforms initiated by the State Government, the Southern Tasmania Council Authority has commissioned a review and development of an updated STRLUS. With this in mind, these exists the potential risk of misalignment between the activity centre strategy and future strategies to be delivered in the next 2-5 years. Our understanding is that this Strategy will assist the STRLUS review.

Further, to ensure that *this* Strategy remains relevant to the revision exercise, the following approach has been undertaken:

- The assessment will first identify the future land use needs of Brighton (M)'s residents. This component will account for Resident Escape Spend [3] (RES) to higher-order activity centres in Southern Tasmania. This will ensure that future local land use recommendations continue supporting these activity centres' viability and vibrancy. In this respect, the analysis will factor in the Hobart CBD Primary Activity Centre and the Principal Activity Centres of Central Glenorchy, Rosny Park and Kingston.
- This Study will then evaluate previously established catchments of Brighton (M)'s activity centres [4]. Once validated, the Study will account for future land use needs of residents within the surrounding catchment areas.
- Lastly, recognising the changing statutory landscape, the analysis considers any relevant approved changes to the local hierarchies of neighbouring municipalities. The analysis will have particular regard for strategic planning changes in Glenorchy, Greater Hobart and Clarence.

2. Revised Population Forecasts

In parallel with the revision of the STRLUS, revised and updated local population forecasts have been commissioned for the region, which considers recent population growth trends. While the projections are the most up-to-date available, it is understood they do account for the population potential of recently identified growth area opportunities in Brighton (M). It is likely, therefore, that, if based on these projects, the assessment of future land use needs could be underestimated.

To account for this, this Study:

- Uses the most recent REMPLAN 2023 forecasts as a baseline projection for Brighton (M).

[3] This is spending by residents of Brighton Council outside of the LGA.

[4] As established in STRLUS.

- Adopts a micro-simulation approach to allocating population projections to the Brighton (M) suburb level, in line with the assessment of local activity centre needs in the municipality.
- Estimates and accounts for additional population supported by growth area development opportunities.

2.0 Strategic Context

Brighton Council in Southern Tasmania has its development shaped by the existing commercial activities and their potential. Development direction is guided by a large set of local, regional and State policies that have a significant range of objectives. Moreover, some are under review. Consideration should be given to how general economic conditions and these documents and objectives will influence outcomes for Brighton's activity centres.

2.1 BACKGROUND

Brighton (M) is in Southern Tasmania and part of Greater Hobart. Occupying the eastern bank of the Derwent River (to the north of Hobart), it comprises five urban and three rural suburbs, with most of its population concentrated in Bridgewater, Brighton suburb (referred to as Brighton (S) [5] henceforth), Gagebrook-Herdsmans Cove, and Old Beach.

Key attractions and cultural landmarks in Brighton (M) include Bonorong Wildlife Sanctuary, ZooDoo, the historic Pontville village, agricultural tourism (featuring wine tasting at local cellar doors), and sites of Aboriginal and military historical significance, including Pontville's oldest Georgian building.

Since 2016, Brighton (M) and Sorrel have had the highest proportional population growth in the southern region and Greater Hobart (up by 21% and 19%, respectively). As of 2022, Brighton's (M) population was approximately 19,688. Population growth at both regional and metropolitan levels is influenced by international migration, a significant demographic factor in Southern Tasmania, which is home to 295,917 people.

Economic growth in Brighton (M) is mostly driven by industrial activities facilitated by the substantial industrial land area (the largest in the region). The municipality currently hosts 853 active businesses, with key employment sectors including agriculture/food manufacturing, accommodation and food services, and public administration and safety. Despite these economic strengths, Brighton (M) faces significant socio-economic challenges, evidenced by the highest levels of disadvantage and rental stress in the region.

[5] To distinguish between the municipality and the locality of Brighton, we denote Brighton Council as Brighton (M) and Brighton suburb as Brighton (S).

Transport infrastructure in Brighton (M) is anchored by three crucial road networks of state and regional importance. The Midland Highway serves as Tasmania's primary freight and passenger link, connecting Launceston to Greater Hobart. The East Derwent Highway runs along the river's eastern shore, linking the Midland Highway to Rosny Hill Road. The Tasman Highway connects Greater Hobart to the east coast, providing a direct route to destinations such as Sorell and the Tasman Peninsula, while supporting both freight and tourism traffic.

Brighton (M) residents rely on private vehicle travel as their primary mode of transport. The only public transport options available in the municipality are buses providing connections with Hobart, Glenorchy and Rosny. Some express buses service Brighton (S) and Bridgewater. The need for light rail and a commuter ferry has been identified and advocated for in the recent years. However, the most recent Draft Keep Hobart Moving Plan (2024) public transport strategy prepared by the State Government does not anticipate the delivery of these services.

Growth Areas and Emerging Development

There are several key residential and commercial growth areas in Brighton (M). These are:

1. The Boyer Road – Future Urban Zone to the west of the Old Main Road precinct in Bridgewater, which is expected to accommodate approximately 350 new residential lots.
2. South Brighton Market, which is planned for development as per the Development Framework Plan, with approximately 565 new residential lots and 1,800 sqm of local business-zoned land.
3. Precinct A – Old Beach Zoning Review on the eastern side of the East Derwent Highway, which is set to accommodate approximately 500 new residential lots.
4. Development at 203-205 Old Beach Road, which is expected to accommodate around 80 new residential lots.
5. Infill projects along Sorell Street and Old Main Road, which have been identified as suitable areas for residential and mixed-used infill development in Bridgewater. These projects align with the opportunities created by the new Bridgewater Bridge project.
6. The Highway Services Precinct extension, approved under the South Brighton Specific Area Plan, which will enable the development of a new commercial area catering to highway services, designed to meet local and regional needs.

This study also assumes the potential for further growth areas and housing development scenarios, not currently considered in the list above.

To this end, we assumed that these are implicitly considered in the forecast population growth outlined in the baseline model.

2.2 POLICY AND STRATEGY REVIEW

Policies, Strategies, masterplan and assessments considered in this review include:

- The Draft Tasmanian Planning Policies (State Planning Office, 2022)
- The Draft Tasmania Population Policy (Department of State Growth, 2024)
- The Tasmanian Planning Scheme & Fact Sheet No. 5 (State Planning Office, 2017)
- The Southern Tasmania Regional Land Use Strategy 2010-2035 (Southern Tasmanian Councils Authority, 2013)
- *Draft* Keep Hobart Moving Plan (Department of State Growth, 2024)
- Brighton Council Structure Plan (Essential Economics, 2018)
- Brighton Council Vision (Brighton Council, 2050)
- Brighton Structure Plan (Echelon Planning, 2019)
- Brighton Social Infrastructure Plan (Ethos Urban & The Community Collaborative, 2018)
- Bridgewater Parkland Master Plan Report (PlaySt, 2016)
- Bridgewater Waterfront Masterplan (Brighton Council, 2023)
- South Brighton Market Assessment (Choice Location Strategists, 2021)
- Old Beach Zoning Review (ERA, 2023).

The remainder of this section provides an overview of the significant effects of these documents.

A Hierarchical Network

Policy and strategic direction at all government levels are generally consistent with established activity centre (AC) planning principles. These policies recognise the importance of centres for both economic growth and community congregation, and their success is linked with the provision of higher-density housing within ACs or in close proximity.

AC policy and strategies in Tasmania, particularly at State and regional levels, maintain their emphasis on the need to create a network of ACs.

This is to define a hierarchy, ensure complementarities and efficiencies and avoid competition between centres. This means supporting the intensification of higher-order ACs serviced by public transport, i.e. directing major trip-generating activities or activity-generating uses to higher-order ACs.

Policy within the *draft* 2022 Tasmanian Planning Provisions (TPPs) states that the role and function of each centre be determined by:

- Existing and planned public and active transport opportunities
- The relevant growth settlement strategy
- Opportunities for innovation, research and emerging industries
- Opportunities for a range of cultural, recreational and community facilities.

The Southern Tasmania Regional Land Use Strategy (STRLUS) identifies the following AC hierarchy:

- Primary Activity Centre – Hobart CBD & immediate surrounds
- Principal Activity Centres – Glenorchy, Rosny Park and Kingston
- Major Activity Centres (MACs) - Bridgewater (Green Point) and Moonah
- Rural Services Centres (RSCs) – Brighton (S), Huonville, New Norfolk, Oatlands, Sorell
- Minor or Neighbourhood Centres and Local strips are to be identified at the local level
- Specialist Centre – Cambridge Park, Derwent Park and others.

The ACs within Brighton (M) that are identified within this hierarchy are Bridgewater (Green Point) and Brighton (S). The remaining centres that are within the scope of this project (Gagebrook-Herdsmans Cove, Pontville and Old Beach) do not have a classification under the STRLUS (Figure 1).

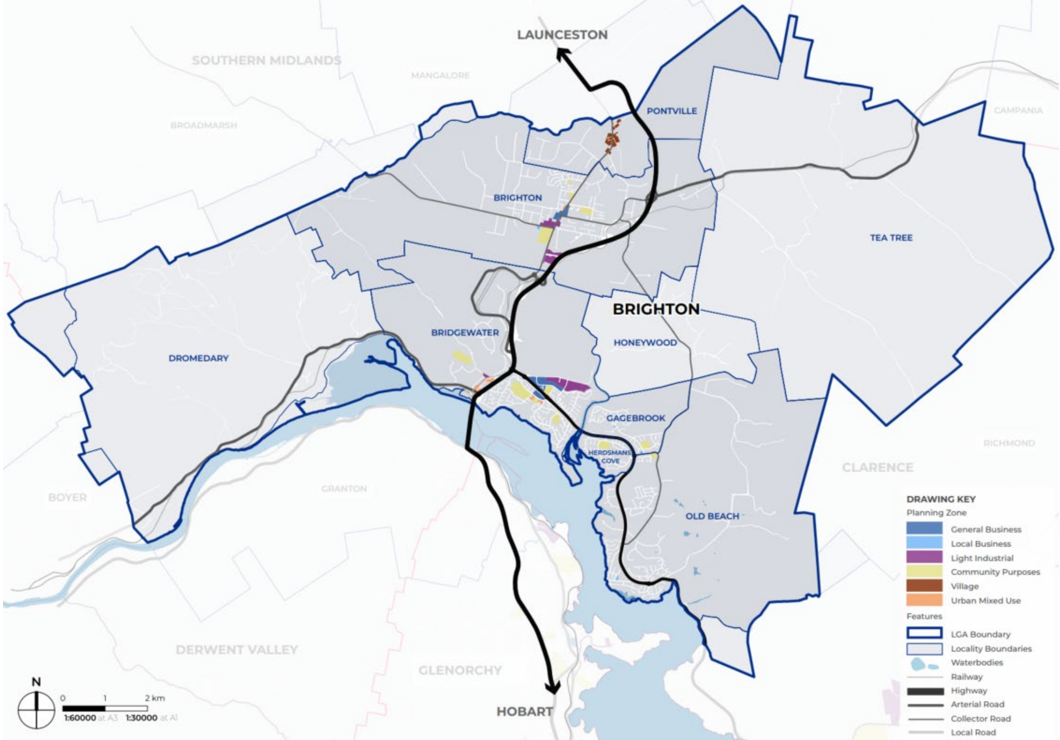


Figure 1: Brighton Activity Centre Network
Source: Mesh, 2024

Land Use

In line with developing ACs as a focus for services, businesses, local employment and social interaction, land use policies direct a mix of uses and multi-functionality in these centres. This is based on the premise that mixed uses are conducive to economic growth and long-term economic resilience.

Businesses

At a local level, ACs are envisioned to offer a diverse mix of local places to work, shop, eat and socialise, creating a vibrant shopping street. Specifically, more takeaways/cafes with healthy options, local restaurants, fruit and veg shops and delis.

Local issues and opportunities include the need for affordable commercial spaces, incentives for industry and businesses to relocate to Brighton, and the potential for a State Government department to be accommodated in the municipality.

A review of the Brighton Council Structure Plan 2018 (Essential Economics) indicated:

- Low vacancy rates across the municipality, suggesting support for the expansion of planning controls in Brighton (M) to encourage retail floorspace. This does not apply to Bridgewater
- Forecast demand for at least 7,220 sqm of retail floorspace and 1,130 sqm of additional commercial office space (2018-2033) the majority to be distributed in Bridgewater and Brighton (S)
- An existing spending leakage to other municipalities, mainly Glenorchy and Hobart.

According to the supportable floorspace assessment (prepared by SGS in 2023), the population growth estimations demonstrate:

- 1,250 to 1,780 sqm of supportable retail floorspace
- 100 to 1,000 sqm of supportable community facilities floorspace
- The existing urban mixed zone land (approximately 11,000 sqm can accommodate commercial and community facilities.

The report does not appear to consider the impact of the above retail floorspace provision to other activity centres in Brighton and the wider region.

High Density Residential

The location of high-density residential uses in – or in close proximity to - activity centres is an established principle in activity centre planning. This should be a main consideration in the preparation of the Strategy as there are reciprocal benefits of locating residential uses in activity centres. In particular, residential uses support the economic success of businesses and significantly contribute to the vibrancy and 'buzz' associated with successful centres. Likewise, centres provide key services and infrastructure to support liveable outcomes for residents.

State, regional and local policy acknowledges the rationale above and seeks to establish that:

- In addition to economic growth considerations, ensure the creation of activity centres that are vibrant and support urban lifestyles
- Allow for above-ground level residential uses in ACs
- Ensure the planning scheme allows for medium-density housing to be established in close proximity to town centres, public transport services and open space.

Community, Culture and Recreation

There is an emphasis on the role of ACs in revitalising and strengthening the local community, providing social cohesion opportunities by concentrating community and social infrastructure such as schools, health care facilities, libraries, social services, child, youth and aged care services. As such, the Strategy should protect existing uses and support any required provisions in the future.

With this in mind, activity centre planning should identify local challenges and support place-based approaches to deliver solutions that engage young people, facilitate participation and enhance feelings of belonging.

At a local level, general issues and opportunities include:

- The need for better access to local health care and wellbeing
- Vulnerability within the western region of Brighton
- Opportunities for communal gardens.

Industry and Tourism

With consideration of the overlapping need to support industry growth and tourism potential, activity centre planning should:

- Not significantly intrude on Industrial land, particularly when it could limit its potential consolidation
- Promote the integration of tourism infrastructure into activity centres
- Provide flexibility within AC for tourism-related use and development
- Consider the constrains planning controls may present to innovative tourism land use and development.

Innovation

Existing policy and strategies, particularly at the State and Regional level, recognise the need to consider the relationship between existing centres, education facilities and the provision of logistics and digital infrastructure. Specifically, the need to:

- Diversify trades and businesses, including green and emerging technologies
- Embrace emerging and innovative businesses and technologies
- Embracing best-practice environmentally sustainable initiatives.

Public Transport Requirements

- Council-endorsed strategies acknowledge the opportunities for light rail servicing Bridgewater in the future. This is contingent on the delivery of a passenger train service in the future using existing rail infrastructure located within the Bridgewater Bridge Precinct, which currently sits within the jurisdiction of higher levels of government.

- Likewise, local policy identifies opportunities for an additional commuter ferry service and station in Bridgewater to encourage public and active transport modes from Brighton to the western bank of Greater Hobart.

- The recently released *draft* Keep Hobart Moving Plan (2024) prepared by the State Government makes no suggestion of the State's intention to facilitate, promote or deliver passenger light rail in Greater Hobart. This draft plan is limited to a high-level indication of a planned Rapid Bus Network (RBN) and potential expansions to the existing commuter ferry services.

- Unfortunately, the indicative RBN and ferry investigation areas shown in the plan exclude Bridgewater and Brighton. The municipality is, therefore, likely to continue to rely on private modes of transport and the existing bus network.

Car Parking Requirements

- At a high level, State and regional policy broadly encourages a modal shift from private vehicle travel to public and active transport modes via parking policy. For instance, encouraging planning policy to remove minimum car parking requirements in activity centres results in the need to improve the provision of end-of-trip facilities and active street frontage layouts in new developments.

- Despite the above, it is understood that a modal shift to public and active transport modes requires a two-tier approach: firstly, the removal of car parking supply to discourage private transport and secondly, the increased provision of a robust public transport system with meaningful catchment areas and good connectivity.

- A review of existing policies identifies that a sustainable transport strategy is still required to coordinate and achieve a modal shift within Brighton. This strategy should assess the implications of removing car parking from activity centres, particularly given the current low pedestrian connectivity, especially for disabled persons. Eliminating car parking without addressing connectivity challenges risks isolating pedestrians.

Application and Drafting of Controls

Specific guidance exists within State and regional policy on the overarching goals and principles when applying and drafting planning controls.

The following directions are relevant to activity centre planning:

- Allow use and development that has little or no impact to proceed without requiring planning approval
- Reduce planning regulation to reflect the level of impact caused by the use and development
- Support the maintenance of regulatory consistency
- Encourage mechanisms that allow for timely adjustments in planning regulation for responses to and recovery from emergency events, pandemics and climate change
- Research, share and expand the available population data and analysis to guide infrastructure, housing and services planning and decision-making
- Allocate a sufficient supply of land within existing settlements for commercial and business use based on existing and projected demands.

Further, State and regional policy directs the following technical application of State Planning Provisions: [6]

- Apply the CBZ, GBZ and LBZ to ACs as appropriate, having regard to its role/function in the network
- Consider a 10–15-year timeframe
- Implemented strategies with structure plans
- Primary and Principal activity centres are identified at a regional/state level, whilst the structure and economic planning of lower-order centres are to be managed and implemented at a local level.

[6] Draft Tasmanian Planning Policy and the STRLUS.

Overarching policy direction seeks to ensure planning interventions provide a high level of flexibility and adaptability. Further, the direction identifies that interventions consider the level of impact caused by the use or potential development. However, the same background documents direct the application and use of State Planning Provision (SPP) zones to ACs. This limits the ability of local government to 'ensure' local planning interventions support that aspirational level of flexibility.

In other words, the level of flexibility and adaptability is determined implicitly by the SPP zones rather than potential local planning interventions. This implies that the SPP zones provide a high level of flexibility, for example, to support emerging industries and businesses (although it's important to note that this has not been tested).

In lieu of this, Specific Area Plans (SAPs) are available to manage specific use or development outcomes that justify a specialised approach. The Strategy needs to respond to both policy directions when designing/applying planning controls. More consistency with SPPs will facilitate a smooth implementation process. However, an approach that relies on SAPs may enable a better outcome for the municipality and its centres.

Land for Commercial and Business Use

Policy within the *draft* 2024 Tasmanian Planning Provisions (TPPs) directs the identification and allocation of a sufficient supply of land within existing settlements to provide for commercial and business use and development, based on existing and projected demands, with further consideration to the following:

1. The nature and scale of the catchment being serviced
2. Consumer demand and demographic forecast
3. Efficient use of existing infrastructure
4. Accessibility to existing transport networks and services
5. Access to employees
6. Activity centre hierarchy
7. Regional settlement hierarchy.

2.3 ACTIVITY CENTRE PROFILES

Bridgewater

Table 1 and Table 2 summarise the findings of a policy and strategic review for Bridgewater, including Bridgewater East (which includes Green Point MAC and Cove Hill) and Bridgewater West (Old Main Road/Bridgewater Bridge Precinct – see Figure 2).

Figure 2: Bridgewater – Activity Centre Profile
Source: Mesh, 2024

1. Bridgewater East (Green Point MAC and Cove Hill)	
Overview	
Land use zones area	**Bridgewater (East and West):** General Business: 17.06 ha Urban Mixed Use: 7.61 ha **Cove Hill:** General Business: 13.83 ha **Green Point:** General Business: 3.23 ha Urban Mixed Use: 2.29 ha
Features	Two main areas: Cove Hill and Green Point and smaller retail and commercial areas
Role	Retail, commercial, civic, educational and industrial
Floor space	13,328 sqm of retail floorspace (Audited in 2018, revised in 2024) 2,080 of commercial floorspace (Audited in 2018, revised in 2024)

1. Bridgewater East (Green Point MAC and Cove Hill)	
Notable tenancies/places	**Cove Hill:** Groceries – Coles Bridgewater (with an estimated 4,000 sqm in floorspace) Food & beverage – KFC, Thirsty Camel, Big Bargain Bottleshop. Discount home – The Reject Shop, Shiploads Medical – Green Point Medical Services Educational – St Pauls Catholic School, Discovery ELC Community services – Community sports hall, St Joseph's Administration Recruitment services – Workskills Civil & emergency services – Bridgewater Fire Station. Bridgewater Ambulance Station, Hobart Community Legal Services Place of assembly – Church & temple Industrial uses to the south of Cove Hill Road (Polyfoam Australia Pty, Waster Transfer Station, Star Track Express) and to the north (Precast Tas, Salva Car Removal, Porta Timber and Metal recycling) **Green Point:** Groceries – Woolworths Green Point (with an estimated 3,500 sqm in floorspace), BWS Postal services – Australia Post Civil & emergency services – Bridgewater Police Station, Brighton Civic Centre, Library, Service Tasmania, Centrelink, Centacare Evolve Housing Recruitment services – Asuria, Max Solutions Educational – Jordan River Learning School (Primary & Secondary) and Bridgewater High School Open space – Bridgewater Parkland Medical – Brighton Community Health Centre, Priceline Pharmacy
Strategic Context	
Classification in AC hierarchy	Bridgewater Green Point is designated as a **Major Activity Centre** with the role of serving the surrounding district and providing a range of convenience goods and services and some community facilities (STRLUS, 2011)
Brighton Social Infrastructure Plan, Ethos Urban, the Community Collaborative (2023)	Bridgewater and Brighton as community services cores Increase activation in the town centre to drive social outcomes and utilisation of civic services and vice versa

1. Bridgewater East (Green Point MAC and Cove Hill)	
Brighton Structure Plan (2018)	Cove Hill and Green Point are physically disconnected by East Derwent The need to accommodate freight and heavy vehicles along the East Derwent Highway Investigate pedestrian overpass locations along the East Derwent Highway Pedestrian connections between Coles and existing pedestrian crossing Public art and landscape improvements Investigate Urban Mixed Zone surrounding Green Point to allow for dwellings Investigate location for a Cove Hill public space Potential emergency services precinct within Bridgewater Advocate for a commuter ferry services with one stop in Bridgewater and Old Beach and establish a waterfront activity node Encourage the establishment of MONAs hacking school in Bridgewater
Bridgewater Parkland – Master Plan Report, Play/St, 2016	Recommendation for the creation of a 'spine corridor' connecting the civic centre with the waterfront with a number of community/recreational uses along the way including a community hub, skate hub, community nursery and a foreshore parkland hub
Bridgewater-Gagebrook-Old Beach Network Study, Department of State Growth	The study aims to improve the East Derwent Highway by enhancing safety and service levels for motorists and pedestrians. It is guided by modelling of future growth scenarios and their impacts on key intersections. Community feedback has highlighted concerns about pedestrian safety when crossing the highway.
Statutory Context	
TPS	**Zones:** General Business Zone Light & General Industrial Community Purpose, Open Space & Urban Mixed Use Zone Surrounded by Inner & General Residential Zones **Codes:** Bushfire, Biodiversity, Natural Assets, landslip, costal erosion codes to the south

1. Bridgewater East (Green Point MAC and Cove Hill)	
LPS	BRI-15.1 – Local Area Objectives – Green Point Area: To develop Green Point as a focal point for Bridgewater and encourage a mix of uses including retail, commercial, residential, administrative and community services that complement and support the strategic role of the area as a Major Activity Centre BRI-15.2 – Local Area Objectives – Cove Hill Area: To develop Cove Hill as a bulky goods and larger format retailing focal point. Larger speciality format retailing and support services to include supermarkets, hardware, discount department stores, camping, disposals, clothing, furniture, lighting, cafes, restaurants and entertainment facilities are to be concentrated at Cove Hill BRI-S4.0 – Bridgewater Quarry Specific Area - Plan (Cove Hill) seeks to protect the operations of the Bridgewater Quarry from incompatible or conflicting use or development
Future Development	
MONA's hacking school	Waterfront precinct
Point.B	Mixed-use industrial precinct

Table 1: Bridgewater East Policy Review Summary
Source: Mesh, 2024

2. Bridgewater West (Old Main Road/Bridgewater Bridge Precinct)	
Overview	
Land use zones area	**Bridgewater (East and West):** General Business: 17.06 ha Urban Mixed Use: 7.61 ha **Old Main Road:** Urban Mixed Use: 5.32 ha
Features	Mix of land uses, services and heritage features Some commercial activity along Old Main Road
Existing role	Highway Services Centre (Midland Highway)
Floor space	High vacancy rate (42%) within the northern end of Bridgewater Bridge (Essential Economics, 2018) 1,000 sqm of retail floorspace (audited in 2018, revised in 2024)
Notable tenancies/places	McDonald's Bridgewater

2. Bridgewater West (Old Main Road/Bridgewater Bridge Precinct)	
Strategic Context	
Classification in AC hierarchy	None
Bridgewater Waterfront Masterplan (2023)	Need to accommodate heavy vehicles along Midland Highway Old Main Road as the central village spine of Bridgewater **Zoning recommendations:** Rural Living to the west to be re-zoned to General Residential Zone to support the Old Main Road precinct Most of land zoned Utilities to be converted to Urban Mixed Use to support the creation of a commercial high street and medium density developments Light Industrial Council land to be rezoned to Community Purpose Zone SAP to study area to implement urban design elements of the Master Plan **Connectivity recommendations:** Re-develop old bridge for a river cruise (tourism) and commuter ferry terminal Urban design improvements (bus stop, separate bike lanes, tree, etc.) Retain rail lines for potential future use and location of passenger railway station 30-metre waterfront corridor
Statutory Context	
TPS	**Zones:** Urban Mixed Use Zone and Utilities Zone Surrounded by General Residential to the east and predominantly Rural Living to the west **Codes:** Individually listed local heritage sites within the centre Bushfire, Biodiversity, Natural Assets, Inundation and Erosion Codes adjoining the centre to the west and south
LPS	BRI-S8.0 – Urban Rural Interface Specific Area Plan (to the west of the Old Main Road centre. This SAP seeks to provide for high density rural living for areas of the Rural Living Zone closer to settlements and urban fringe areas.
Future Development	
New Bridgewater bridge	Due 2025
Bridgewater Bridge Waterfront Masterplan	Rural Living Zone to the west currently identified for infill development opportunities. The Boyer Road Future Urban Zone (further to the west) is expected to accommodate approximately 350 new lots.

Table 2: Bridgewater West Policy Review Summary
Source: Mesh, 2024

Brighton (S)

This includes the existing Rural Services Centre (RSC) and Highway Services Precinct, as well as the South Brighton and Brighton Shopping Centre (Figure 3). Results are summarised in Table 3.

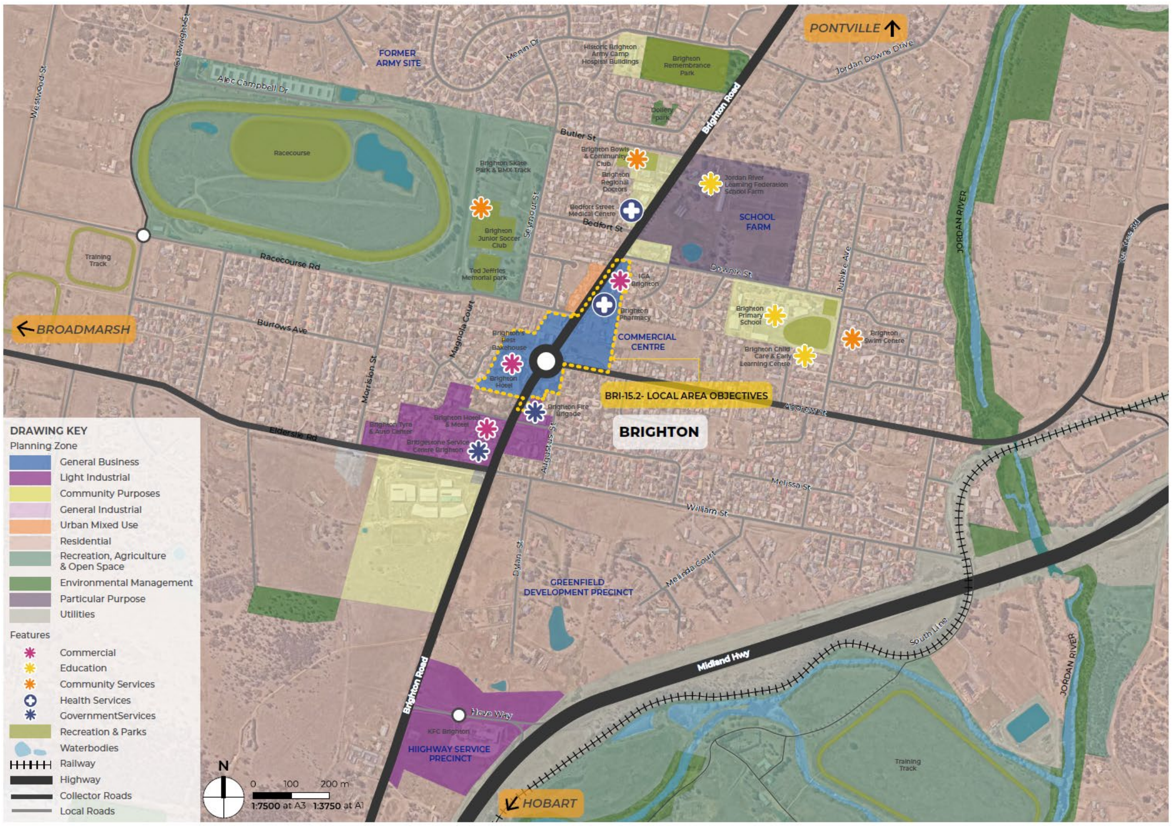


Figure 3: Brighton (S) – Activity Centre Profile
Source: Mesh, 2024

3. Brighton (S) (incl. Highway Services Precinct)	
Overview	
Land use zones area	General Business: 6.30 ha Local Business: 0.66 ha Urban Mixed Use: 0.67 ha
Features	Scattered commercial activity along Brighton Street, small scale supermarket, health, educational and recreation land uses
Role	Limited commercial, health, educational and recreational services

3. Brighton (S) (incl. Highway Services Precinct)	
Floor space	3,214 sqm of retail floorspace and approximately 80 sqm in commercial floorspace (Audited in 2018, revised in 2024). This excludes 2,107 sqm in forthcoming retail floorspace from shopping centre development. 100 sqm to 1,000 sqm of community facilities floorspace The existing urban mixed zone land (approximately 11,000 sqm) can accommodate commercial and community facilities) (SGS, 2023)
Notable tenancies/places	Groceries – IGA Brighton Emergency services – Brighton Fire Brigade Health – Bedford Street Medical Centre, Brighton Pharmacy, Brighton Dental Centre Recreation – Brighton Skate Park/BMX Track, Brighton Bowls Community Club, Brighton Soccer Club Food & beverage – Brighton's Best Bakehouse, Moes Cafe Education – Jordan River Learning Federation School Farm, Brighton Primary School, Brighton Child Care & Early Learning Centre Hotels – Brighton Hotel & Motel
Strategic Context	
Classification in AC hierarchy	**Rural Services Centre** with the role of providing a range of goods and services and meeting the needs of predominantly non-urban community, with trips to larger activity centres required occasionally.
Brighton Social Infrastructure Plan, Ethos Urban, the Community Collaborative (2023)	The Brighton Municipal Memorial Hall and the Old Beach Community Centre are identified as an asset upgrade priority with highest potential to accommodate future growth Bridgewater and Brighton as community services cores Consolidate social infrastructure close to the Brighton town centre Advocate for a new small-scale library in Brighton's centre
Brighton Structure Plan (2018)	A number of urban design improvements (development to face streets, widen footpaths, outdoor dining, footpath upgrades and landscaping) Encourage the re-development of 51 Brighton Road for a landmark multi-level building Traffic and Car Parking Management Plan for the town centre Advocate for light rail services to be extended to Brighton
Brighton Council Structure Plan, Essential Economics (2018)	Low vacancy rates suggest support for expansion of planning controls encouraging retail floorspace (except for Bridgewater) Consider testing whether there continues to be a lack of a critical mass of population to support major retail development in Brighton

3. Brighton (S) (incl. Highway Services Precinct)	
Brighton Structure Plan, Echelon (2018)	Ensure attenuation buffers around the Brighton Transport Hub and Industrial Estate area maintained Advocate for improved bus services, upgrade to bus stops and shelters and locations for park and ride facilities for bus services Investigate options for markets, festivals and pop-up art exhibitions Ensure the planning scheme allows for medium density housing to be established in close proximity to town centres, public transport services and open space
Brighton Town Centre Local Area Plan, Aurecon (2012)	Brighton's Activity Centre is recognised as composed of the following key areas: Commercial Town Centre – two clusters of activity Former Army Site School Farm Highway Services Precinct Greenfield Development Precinct (now South Brighton Market)
Statutory Context	
TPS	**Zones:** General Business Zone, Light industrial, Particular Purpose Zone (Bridgewater Highschool Farm) Community Purpose Zone Surrounded by General Residential and Recreation Zone **Codes:** Individually listed local heritage sites within the centre Natural Assets Code to small section to the west of Brighton Road/Downie Street
LPS	BRI-15.3 – Local Area Objectives – Brighton Town Centre: To develop the Brighton town centre as a Rural Services Centre for the surrounding region and encourage consolidation of the town centre and provide a mix of uses including retail, commercial, administrative and community services that complement this function and provide for the needs of the local community. BRI-S11.0 – South Brighton Specific Area Plan to implement the South Brighton Development Framework, vary the Use Table of the Local Business Zone and allow for increased density with variations to the subdivision standards (lot size), among others

3. Brighton (S) (incl. Highway Services Precinct)	
Surrounding LPS	BRI-S8.0 – Urban Rural Interface Specific Area Plan – to the south, east and north BRI-S1.0 – Brighton Horse Racing Specific Area Plan – to the west BRI-S4.0 – Brighton Quarry Specific Area Plan; BRI-S10 – Brighton Industrial Hub Specific Area Plan and BRI-S12.1 – Burrows Avenue Specific Area Plan – to the south BRI-S11.0 – South Brighton Specific Area Plan – to the south
Future Development	
Shopping centre and supermarket	Lot 162, Brighton Road for a small-scale shopping centre and supermarket. Development is expected to support 2,107 sqm in retail floorspace, with Banjo's Bakery confirmed as a tenant.
South Brighton Market	As per Development Framework Plan. Approximately 550 new lots and 2,800 sqm of local business zoned land.

Table 3: Brighton (S) Policy Review Summary
Source: Mesh, 2024

Pontville

Pontville is characterised by its mixed-use and rural settings (Figure 4). Results are summarised in Table 4.

Figure 4: Pontville – Activity Centre Profile
Source: Mesh, 2024

4. Pontville	
Overview	
Land use zones area	Village: 10.98 ha
Features	Visitor accommodation and historical landmarks Proximity to Brighton's AC
Role	Tourism
Floor space	270 sqm of retail floorspace (reviewed in 2024)

4. Pontville	
Notable tenancies/places	Visitor accommodation – Lythgo's Row Colonial Cottages Hotel – The Crown Inn Employment centre – Southern Workforce Network
Strategic Context	
Classification in AC hierarchy	Not classified
Brighton Structure Plan, Echelon (2008)	Lower traffic speeds, extensions to pedestrian connections and improved signage for safer navigation Create a historic trails network and thematic interpretation following the Pontville Trail Network Concept Plan Consider improvements and new recreational facilities within Pontville Park
Statutory Context	
TPS	**Zones:** Village Zone Surrounded by Rural Living, Open Space/Recreation Zone and a small patch of General Residential Zone. **Codes:** Local Historical Heritage Code – Pontville (Precinct) and individually significant properties Landslip, Bushfire, Natural Assets, Flood Prone Areas (west)
LPS	N/A
Future Development	
N/A	None identified

Table 4: Pontville Policy Review Summary
Source: Mesh, 2024

Old Beach

Old Beach is a primarily residential suburb recent growth featuring established homes and newer developments (Figure 5). Results are summarised in Table 5.

Figure 5: Old Beach – Activity Centre Profile
Source: Mesh, 2024

5. Old Beach	
Overview	
Land use zones area	General Business: 0.48 ha
Features	Community Services, Recreational uses and home-based businesses scattered throughout the suburb
Role	Local – small scale. Organic growth of home-based businesses taking advantage of waterfront and distance from other centres.
Floor space	390 sqm of estimated retail floorspace (2024)

5. Old Beach	
Notable tenancies/places	'Yourtown Bridgewater' (Youth Social Services) Old Beach Community Hub Brighton Community Food Hub Old Beach Scout Hall Lennox Park
Strategic Context	
Classification in AC hierarchy	Not defined
Brighton Social Infrastructure Plan, Ethos Urban, the Community Collaborative (2023)	The Brighton Municipal Memorial Hall and the Old Beach Community Centre are identified as an asset upgrade priority with highest potential to accommodate future growth Activation should be driven on this site to incentivise community us and the role of the community hub.
Old Beach Zoning Review, ERA (2023)	This study compares two potential growth areas in Old Beach and makes recommendations for changes to the UGB, re-zoning to the Future Urban Zone (General Residential Zone) to allow the creation of up to 580 new lots It recognises the benefits of establishing a convenience/neighbourhood level shop in Old Beach to support the anticipated growth of 3,000 residents in the next 10 years. Precinct A is identified as suitable to provide these services (East of East Derwent Highway).
Statutory Context	
TPS	**Zones:** Local Business Zone (one property)/Recreation Zone surrounded by General Residential Zone **Codes:** Bushfire Prone Areas, Inundation/Coastal Erosion, Natural Assets, near the waterfront
LPS	BRI-S9.0 – Tivoli Green Specific Area Plan (opportunities for commercial)
Future Development	
Precinct A, as identified in the Old Beach Zoning Review (ERA 2023), located on the eastern side of the highway	Approximately 500 new lots
203-205 Old Bead Road	Approximately 80 new lots
Lennox Park, Jetty Road	Container café

Table 5: Old Beach Policy Review Summary
Source: Mesh, 2024

Gagebrook-Herdsmans Cove

Gagebrook-Herdsmans Cove features a mix of housing, schools, community centres, along with access to essential services such as education facilities (Figure 6). Results are summarised in Table 6.

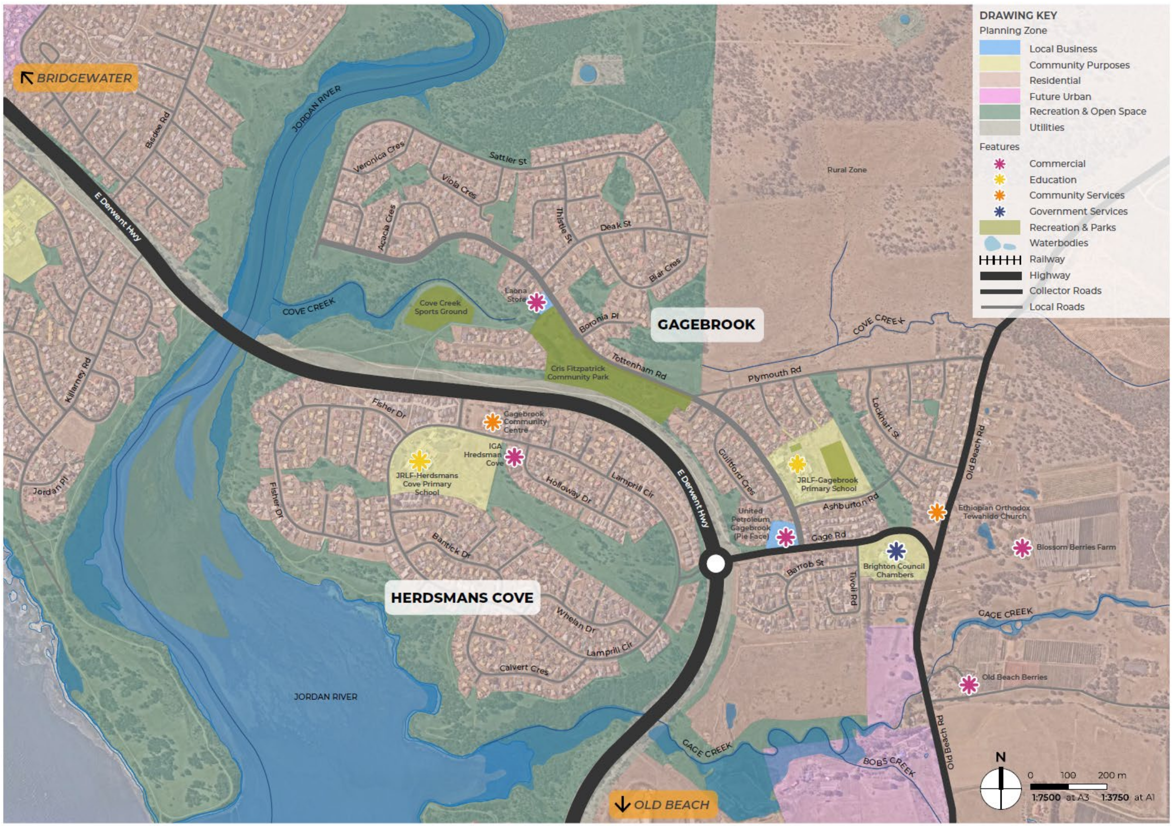


Figure 6: Gagebrook-Herdsmans Cove – Activity Centre Profile
Source: Mesh, 2024

6. Gagebrook-Herdsmans Cove	
Overview	
Land use zones area	Local Business: 0.86 ha
Features	Council's chambers and schools
Role	Local – Small Scale
Floor space	457 sqm in estimated retail floorspace

6. Gagebrook-Herdsmans Cove	
Notable tenancies/places	Brighton Council Chambers Herdsman Cove IGA – Lamprill Circuit Primary Schools Service Station Laona Store – small convenience store
Strategic Context	
Classification in AC hierarchy	Not classified
Brighton Social Infrastructure Plan, Ethos Urban, the Community Collaborative (2023)	Social and physical community fragmentation and lack of an identifiable town centre between Old Beach and Gagebrook and Herdsmans Cove Recommends the identification of a new social infrastructure node/local town centre. Co-location near Council chamber could facilitate the creation of a significant civic centre. Potentially identifies as a preferred location for a youth centre Build on the existing community core at the community centre and IGA Expand community benefits on Council Chambers land
Statutory context	
TPS	**Zones:** Local Business Zone (two segregated properties Service Station and Fish and Chips and convenience store) Community Uses (Primary Schools) **Codes:** Bushfire, Natural Assets and Coastal inundation along waterfront
LPS	To the south – BRI-S9.0 – Tivoli Green Specific Area Plan
Future Development	
Tivoli Green	Greenfield development also identified under the Old Beach AC profile

Table 6: Gagebrook-Herdsmans Cove Policy Review Summary
Source: Mesh, 2024

2.4 CONCLUSION – GENERAL

Information on the key planning and strategy documents that will (or can) influence development in Brighton (M) is provided in the Appendix. General implications are provided here.

A review of relevant strategic plans, policies and masterplans at State, Regional, metropolitan and local levels suggests that there is support for the growth and economic development of the existing centres within

Bridgewater and Brighton (S) as activity centres within local and regional catchments.

While there are fewer references to lower-order centres, some of the recent work has recognised the existing fragmentation of activity in these centres and the need to identify a town centre. This would have multiple benefits, including the development of a recognisable precinct that may attract a wider range of uses, including evening economy activity (e.g., dining and takeaway).

Notably, only the following suburbs record significant night-time spending:

- Bridgewater ($12 million in Total Local Spend in 2023-24, of which $7 million was from residents);
- Brighton (S) – $4.4 million, with $2 million from residents; and
- Gagebrook at $443,000 all of which was from residents (Spendmapp, 2024 [7]).

The analysis of these documents also shows that:

- Considering the ongoing review of key State and Regional policies and strategies, there is a potential for misalignment between the activity centre strategy and future strategies to be delivered in the next 2-5 years, notably the STRLUS and the review of the Tasmanian Planning Scheme Provisions. Our understanding is this Strategy will assist the STRLUS review.
- One of the main challenges with activity centre planning in Tasmania is the lack of a robust public transport strategy to inform the role and hierarchy designation of activity centres. For Bridgewater, this lack of direction is exacerbated by the fragmented conditions of the centre presenting two or three long-term growth options: Green Point, Cove Hill or Old Main Road.
- A sustainable transport strategy is needed to coordinate and achieve a modal shift within Brighton and to establish whether car parking requirements can be removed from activity centres as encouraged by State and regional policy.
- There is an immediate need to advocate for the inclusion of Brighton (M)'s centres in the planning of the future ferry stations and Rapid Bus Network for Greater Hobart to improve accessibility

[7] A detailed analysis of the patterns in the night-time spend data and discussion of any potential opportunities is beyond the scope of this study. The floorspace analysis is based on an analysis of the aggregated spend (that is, both night and day combined).

and mobility in the municipality but also to provide long-term guidance and support for the development and hierarchy of the centres.

- The municipality is experiencing growth pressures and is expected to accommodate a significant proportion of the needed housing supply in Southern Tasmania. In particular, residential growth is expected in the short to medium term in Bridgewater (West), Brighton (South), and Old Beach.
- There is strong strategic and planning direction for the growth of Bridgewater and Brighton (S) as the leading centres of Brighton (M) and some evidence to suggest the need to revise their roles in the regional network due to the catchment areas serviced and the need for the further congregation of services in the municipality.
- The designation of roles and functions for each activity centre needs to consider the broader regional network of centres.
- Excluding Brighton (S), a common challenge across activity centres is the lack of a 'high street' with the potential to become a pedestrian/vibrant road. Most centres are located on roads that serve as key freight and passenger vehicle routes. Additionally, there is a need for pedestrian functionality audits to assess access for all users, including parents with prams and individuals using wheelchairs.
- There is a clear need to define activity centre boundaries to congregate activities within all centres, including the delivery of public transport, community infrastructure and higher-density housing. This is particularly important for Old Beach and Gagebrook-Herdmans Cove.
- Overarching policy direction seeks to ensure planning interventions/regulation provide a high level of flexibility and adaptability and reflect the level of impact caused by the use/development regulated.

2.5 CONCLUSION – BY CENTRE

Information on the key planning and strategy documents that will (or can) influence development in Brighton (M) is provided in the Appendix. Location-specific implications are provided here.

Bridgewater

- The STRLUS classifies Bridgewater (Green Point) as a Major Activity Centre. It is unclear whether this classification encompasses Cove Hill.
- Bridgewater is made up of three separate precincts, which suggests the need for further definition. For instance, while Old Main Road forms part of Bridgewater suburb, it may warrant designation as a separate activity centre due to its distance from Green Point, the lack of permeability between the two and the different opportunities and constraints posed by its location in relation to the new and old Bridgewater Bridge and the waterfront.
- Green Point serves as a commercial/retail node with proximity to key civic land uses and open space infrastructure. It also acts as a hub for supporting those facing social disadvantage, hosting essential services such as Centrelink, Service Tasmania, recruitment agencies, the library, and the police. However, it lacks permeability and a defined 'main street', which may limit its cohesion and accessibility. Relocating these services would have a significant impact on the community.
- Cove Hill directly adjoins industrial land, which can be seen as both a challenge and an opportunity. Industrial land may constrain the establishment of higher-density residential uses to the north of Cove Hill to support its success. On the other hand, the industrial land could provide the flexibility/affordability required for 'innovative', 'unanticipated' land uses/businesses required for the success of the activity centre, such as a large brewery, tourism uses, recreational uses, etc with higher land size needs which in turn have the potential to act as anchors to the activity centre and support its long-term success and growth.
- There are opportunities for pedestrian/cycling connections between nodes of activity via a spine corridor as identified in the Bridgewater Parkland Master Plan.
- Whilst Green Point and Cove Hill are potentially two of the most successful nodes of activity in Brighton, these nodes are divided by the East Derwent Highway, a key freight route. This presents a significant constraint for establishing a cohesive and connected activity centre. Its fragmentation raises questions about its future role as the principal centre within Brighton (M) given the challenges of its development as a vibrant and attractive precinct. Further stages of the strategy should consider:
    - Whether other centres in the municipality are better placed for to occupy the role of a principal centre in the long-term

- Whether the permeability and access limitations of Green Point/Cove Hill can be resolved with urban design interventions
- Whether the separation of Cove Hill and Green Point is necessary to secure the long-term economic success of Green Point and its establishment as the principal activity centre of Brighton
- Whether Hurst Street as a connector/local road is better suited to accommodate an activity centre, particularly in comparison to East Derwent Highway and Green Point.

- The Old Main Road precinct has limited commercial/retail activity at present but its strategic position (adjoining potential future passenger train stations and commuter ferry stations) presents opportunities for a more viable future activity centre when compared to Green Point and Cove Hill. However, the State Government's decision not to include rail on the bridge makes such developments unlikely in the near future.
- Old Main Road is a lower-order road presenting an opportunity for long-term pedestrian activation and connections. Further stages of this strategy should consider:
    - Whether Old Main Road should be defined as a separate activity centre and if so, what role and function should be designated to it to ensure its medium to long-term success.

Brighton (S)

- Brighton (S) has the potential to become a vibrant activity centre in the short to medium term. Nodes of activity are concentrated along Brighton Road, which has the potential to become a thriving 'high street' because:
    - It has a lower-order function within the road network
    - Retail and commercial businesses are located on both sides of the road and are predominantly oriented to the main street
    - The centre is mostly flat and has footpaths on at least one side encouraging walkability.
- Subject to the delivery of the South Brighton Market, the centre will be supported by increased housing.
- The Strategy should consider:
    - What planning controls best serve is positioning as a Rural Services Centre and potentially a Major Activity Centre in

- the long-term, including the need to increase the density and diversity of housing.
  - How to best integrate and connect the different identified precincts within the centre.

Pontville

- There are limited references and guidance for the growth of Pontville other than the 2018 Structure Plan.
- A desktop review shows there are merits for the designation of Pontville as a specialist centre. Further, some challenges identified for this centre include the lack of footpaths, continuity and connectivity between landmarks and hotels.
- The Strategy should consider:
  - Whether there is sufficient justification for the classification of Pontville as a specialist centre
  - How to best enhance the celebration of the historical landmarks within Pontville for the economic success of the centre
  - Strategies to better link Pontville with established tourism industries in the region (wineries, MONA, etc.) or how to develop an innovative/authentic role in the tourism industry of Southern Tasmania.

Old Beach

- From a desktop review, it is clear that the Old Beach Neighbourhood Store serves as a limited convenience store/fish and chips shop. Old Beach residents rely on Bridgewater and Glenorchy for retail and commercial needs.
- Considering the existing escaped spending patterns and anticipated population growth in Old Beach, the establishment of a local convenience centre is crucial to improve the liveability outcomes of the community.
- Jetty Road appears to be the location of the centre, with one property zoned Local Business Zone; however, some strategies identify the potential for Tivoli Green's development to include a commercial offering.
- It is important to note that the East Derwent Highway acts as a barrier between Tivoli Green and Jetty Road. Currently there is minimal or no safe pedestrian between the two areas.
- The Strategy should consider:

- How to best balance the need to improve liveability outcomes in Old Beach, accounting for a reasonable share of spending that should defer to Bridgewater as the higher-order activity centre.
- Where in Old Beach a local centre should be established, possibly along Jetty Road or in Tivoli Green. Given the current constraints of the East Derwent Highway, there may be a need for a local centre in each of these areas.
- The planning controls that would support its short and long-term success.

Gagebrook-Herdsmans Cove

- Gabebrook-Herdsmans Cove accommodates a small local convenience store (IGA), Council Chambers, a primary school and a couple of community parks and recreation zones. These uses are scattered across the suburb and on both sides of the East Derwent Highway with limited pedestrian connectivity.
- There are nodes of activity identified along Gage Road, Lamprill Circuit and Tottenham Road.
- There is a clear need to identify a town centre to provide direction for growth and serve the local catchment. The Strategy should consider:
  - How to best balance the need to improve liveability outcomes in Gagebrook-Herdsmans Cove and the impact a new local centre would have on Bridgewater
  - Where a local centre should be established (e.g., Gage Road, Lamprill Circuit or Tottenham Road)
  - The planning controls that would support its short and long-term success.
- Alternatively, whether a local centre should be provided within Gagebrook-Herdsmans Cove instead of Old Beach to support improved liveability outcomes within this area of Brighton.

3.0 Economic & Demographic Context

An analysis of the economic and demographic characteristics of Brighton and its surroundings suggests that, while historical and forecast job growth may be modest, population growth has been and will likely continue to be higher than expected. While Brighton (S) and Bridgewater are local and regional service centres, Glenorchy, Hobart and Moonah are important consumer expenditure destinations for residents. In terms of Resident Escape Spend, bulky goods may represent a development opportunity.

3.1 MODELLING PRINCIPLES

The following outlines this Study's analytical focus and modelling principles for the retail needs of each major suburb in the municipality.

Bridgewater

The Study assesses the total retail needs for Bridgewater through the lens of Green Point, Cove Hill, Old Main Road and Brighton Industrial Hub. The analysis will focus on two questions:

1. What is the future retail demand for Bridgewater, particularly Green Point MAC, as the regional servicing activity centre?
2. After considering the needs of Green Point MAC, what is the excess retail demand for Cove Hill, Old Main Rd and Brighton Industrial Hub to support their respective local retail needs?

Brighton (S)

The Study will assess the total retail needs of Brighton (S) through the lens of the Brighton RSC and the South Brighton Highway Services Precinct. The analysis will focus on two questions:

1. What is the future retail demand for Brighton (S) while considering Green Point MAC as the higher-order activity centre?
2. What is the excess retail demand to Highway Services Precinct (also known as South Brighton) as a potential speciality bulky goods focussed area?

Gagebrook-Herdsmans Cove

The Study assesses the local retail needs of Gagebrook and Herdsmans Cove suburbs through the lens of existing retail allotments in Tottenham Rd, Gagebrook and Lamprill Circle, Herdsmans Cove. The analysis will identify the future retail demand for the two suburbs combined.

Pontville

Recognising the limited retail offering and potential tourism functionality, this Study assesses the future retail demand for Pontville, with consideration of non-resident spending patterns.

Old Beach

This Study assesses the total retail needs of Old Beach suburb through the lens of potential retail offerings in Jetty Road, Old Beach and the Tivoli Green Estate. The analysis will focus on two questions:

1. What is the future retail demand for Old Beach, taking into consideration future residential estates and the potential to re-capture expenditure leakage to neighbouring municipalities?
2. What are the retail allocations between Jetty Road and Tivoli Green Estate?

Bulky Goods Retail in Brighton (M)

This Strategy also recognises a high level of Resident Escape Spend in bulky good retail. At present, there are currently no full or mid-size bulky goods providers to service local retail needs. Mindful of that, this Study evaluates existing and future bulky good land use needs in Brighton (M).

Commercial Land in Brighton (M)

Lastly, the Strategy seeks to identify the commercial needs and model land use outcomes and recommendations for each of Brighton's activity centres. This will be assessed at the municipal level, where identified local allocation opportunities will be investigated at the activity centre level of Brighton (M).

3.2 METHOD OF THE ANALYSIS

The Use of Consumer Expenditure Data

Where possible, this Study has relied on the use of real consumer spend and other datasets to understand existing retail needs and gaps and project future land use trends in Brighton (M). In particular, Spendmapp [8] data has been used for the economic analysis. This provides:

- Real consumer spending trends for Brighton (M) residents and visitors;
- The actual real catchments of patrons to Brighton's (M) activity centres; and
- Resident Escape Spend from Brighton (M) residents to other activity centres in Southern Tasmania and the online retail economy.

Expenditure categories used for this analysis are derived from the banking sector's 'Merchant Category Codes' (MCCs). These are globally consistent definitions. For the purposes of this study, they have been aligned with the ABS's retail spend categories (see Appendix).

Land Use Needs Assessment

1. The land use needs assessment took the following approach:
2. Firstly, establish the strategic policy context for Brighton (M) and its retail activity.
3. Develop a retail land use forecasting model to identify existing and future retail needs of Brighton's (M) activity centres. The retail model was developed through:
    a. A suburb-level population model that microsimulates the REMPLAN population forecasts down to the suburb level and appends any additional population growth to identified growth areas.
    b. An assessment and profile of FY2023 spending patterns by residents and visitors to each of Brighton's (M) activity centres, factoring in Resident Escape Spend to neighbouring and higher order activity centres.
    c. Forecasting the total and per capital spend for each of Brighton's (M) activity centres, holding fixed the existing RES. The forecast will also consider existing and future changes in online retail trends and the long-run category-level retail growth rates.
    d. Forecasting the total land use needs by applying floorspace and land-to-spend ratios for each AC.

[8] Spendmapp.com.au

4. Compose a commercial land use forecasting model to identify existing and future needs. They will encompass:
    a. A municipal-level employment forecast using historical jobs data (sourced primarily from the ABS Census) and applying historical growth rate projections.
    b. Estimates of future job numbers in Brighton (M) by industry sector.
    c. Forecasts of total commercial land use needs using jobs-to-floorspace and floorspace-to-land ratios by industry land use categories.
    d. Undertaking an activity centre audit and gap analysis through a desktop assessment of the existing retail and commercial floorspace and land use. From this, the gap between existing supply and future demand will be determined and the subsequent land use opportunities.

More details on the methodology are provided in the Appendix.

3.3 DEMOGRAPHIC AND ECONOMIC FINDINGS

The assessment of economic and demographic data has identified six themes defining the Brighton (M) retail and commercial economy.

1. Brighton (M) has Consistently Experienced Higher-than-Expected Population Growth

When compared to actual population levels, the previously established Department of Treasury and Finance official forecasts have underestimated population growth in Brighton (M) (Figure 7).

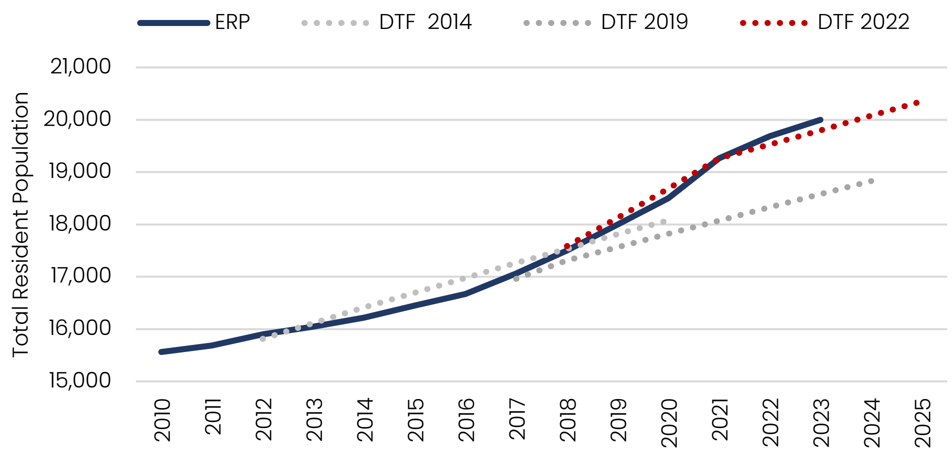


Figure 7: Comparison of ERP and Historical DTF Forecasts, Brighton (M)
Source: ABS Estimated Resident Population (ERP) and TAS Department of Treasury (DTF) Population Forecasts for 2014, 2019 and 2022

One of the challenges of accurate forecasting of Brighton's (M) population is accounting for its rapidly expanding residential growth areas. A large part of Brighton contains rural living residential land uses. Housing affordability pressures are seeing these areas being developed to higher densities.

This analysis has adjusted modelling input assumptions to account for the (historically) consistently under-estimated forecasts.

2. Rapid Population Growth in Brighton (S) and Its Implications for Retail

As highlighted in the previous section, Brighton (M) has consistently exceeded population growth expectations. With an ongoing development pipeline in various suburbs (see Section 2.1 Background for a recap), Brighton (S) is projected to become the largest suburb within Brighton (S) in terms of population (Figure 8). This trend indicates that retail demand – and, by extension, AC prominence – will be increasingly concentrated in Brighton (S). The retail model in these investigations incorporates assumptions to account for this growing population base.

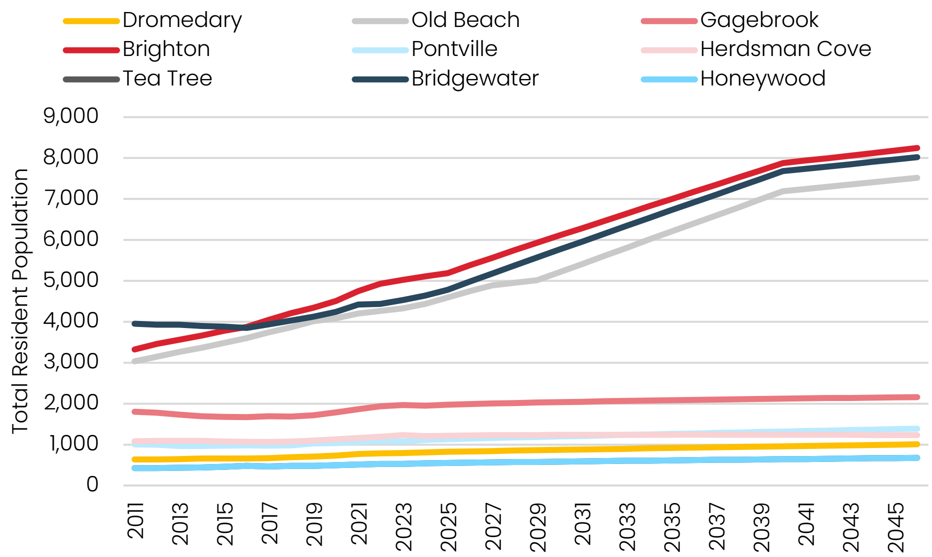


Figure 8: Population Forecasts by Suburb, Brighton (M)
Source: Geografia, 2024 and REMPLAN, 2023

3. Modest Job Growth, Driven by Population Servicing Sectors

Historical employment data from the ABS shows modest job growth in Brighton (M). Over the ten years between the 2011 and 2021 Censuses, the count of jobs increased by 58% to 3,684 (Table 7). Job increases have largely been driven by population-servicing industries, such as Retail (up by 72%), Education & Training (up by 23%), Health Care (up by 69%) and Construction (up by 54%). Continued growth in these sectors is likely to support modest commercial land use demand.

Industry of Employment	2006	2011	2016	2021	10-Year Change
Agriculture, Forestry and Fishing	59	57	68	106	86%
Mining	6	11	13	21	91%
Manufacturing	108	180	139	219	22%
Electricity, Gas, Water and Waste Services	3	23	17	23	0%
Construction	163	260	310	400	54%
Wholesale Trade	82	128	92	125	-2%
Retail Trade	198	234	287	403	72%
Accommodation and Food Services	120	154	206	225	46%
Transport, Postal and Warehousing	169	267	439	590	121%

Industry of Employment	2006	2011	2016	2021	10-Year Change
Information Media and Telecommunications	8	7	13	20	186%
Financial and Insurance Services	6	4	9	7	75%
Rental, Hiring and Real Estate Services	24	31	8	16	-48%
Professional, Scientific and Technical Services	22	41	55	73	78%
Administrative and Support Services	49	63	98	123	95%
Public Administration and Safety	142	141	144	148	5%
Education and Training	292	325	342	401	23%
Health Care and Social Assistance	176	207	286	350	69%
Arts and Recreation Services	38	54	68	102	89%
Other Services	68	107	129	188	76%
Total	**1,745**	**2,325**	**2,807**	**3,684**	**58%**

Table 7: Total Number of Jobs, 2006-21, Brighton (M)
Source: ABS Place of Work 2006, 2011 and 2011 Census; and ABS Place of Employment 2021 Census. The ten-year change is from 2011 to 2021

Brighton (M) has also experienced a considerable increase in the number of light industry jobs. Notably, at 590 jobs, Transport, Postal and Warehousing is now the largest industry in the municipality (up by 121% from 2011). Although outside the scope of this Study, it may be worth further investigation as shifts in industry dominance of this scale can significantly impact the typology of industrial land use demand.

4. Continued Regional Role of Bridgewater and Brighton (S)

Analysis of Spendmapp data [9] reveals that Bridgewater and Brighton (S) both continue to have a regional servicing role. Figure 9 and Figure 10 illustrate their respective catchments, both of which expand beyond the municipality into the northern suburbs of Glenorchy and rural interior regions of Southern Midlands.

These catchments are in line with the population servicing catchments identified by STRLUS 2013 [10] and are used in the analysis to follow. Figure 27 in the Appendix further highlights the ongoing primacy of Bridgewater, as

[9] See the Appendix for a definition of the Spendmapp terms used in this Study.
[10] P. 83 Map 8 Activity Centre Network, STRLUS

indicated by the forecasted total retail spending by activity centre, while also showing emerging growth in Brighton (S) and Old Beach.

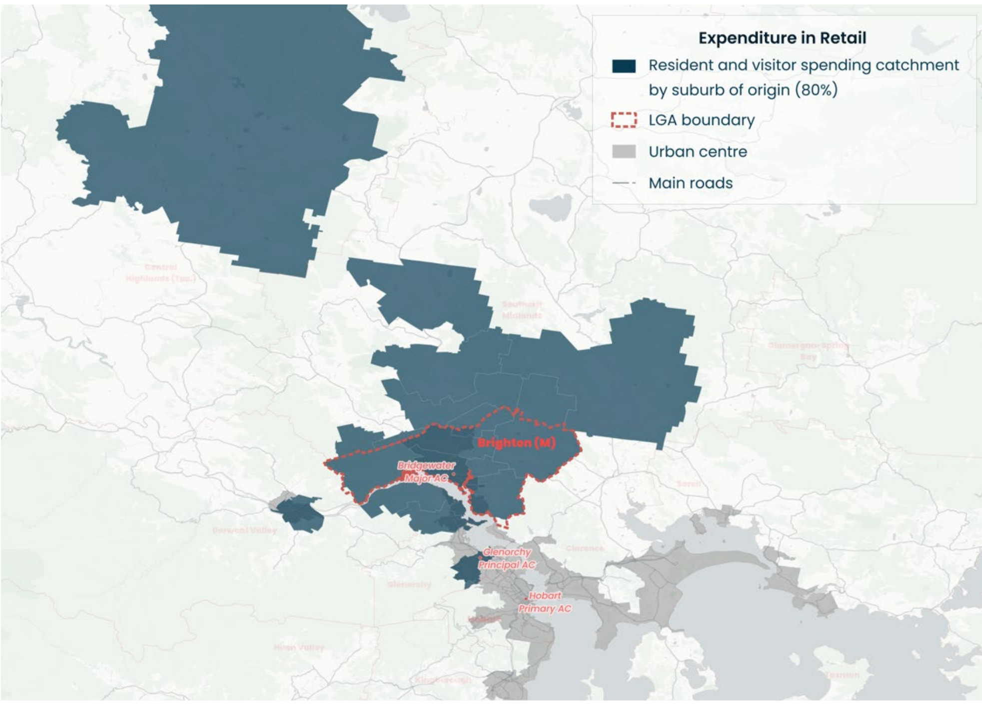


Figure 9: Actual Retail Catchment – Bridgewater (including Cove Hill and Green Point)
Source: Spendmapp by Geografia, 2024

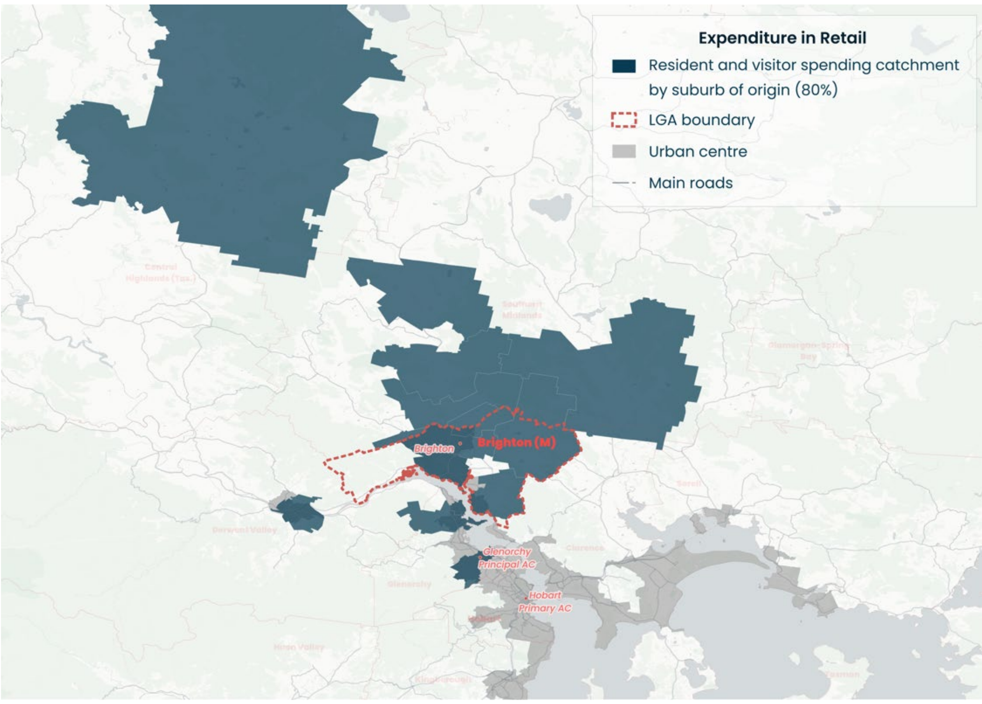


Figure 10: Actual Retail Catchment - Brighton (S)

Source: Spendmapp by Geografia, 2024

5. Glenorchy, Hobart CBD and Moonah are Major Retail Destinations for Brighton (M) Residents

Table 8 summarises the spend patterns of Brighton (M) residents as defined using Spendmapp data for the 2023 Financial Year.

Activity Centre Hierarchy in Southern Tasmania	Share of Brighton (M) Resident Spending
Higher-Order Centres (Hobart, Glenorchy, Rosny Park)	21%
Bridgewater	17%
Brighton (S) and Other Neighbourhood and Local Activity Centres Brighton (M)	11%
Other Neighbourhood and Local Activity Centres Outside Brighton (M)	26%
Online	24%
Total	**100%**

Table 8: Share of Retail Spending by Brighton (M) Residents, FY23
This shows the share of retail spending in activity centre locations in Southern Tasmania attributable to Brighton (M) residents. Source: Spendmapp by Geografia, 2024

Notably, the data shows that Glenorchy and Hobart CBD have a prominent role in meeting the needs of Brighton (M) residents. In FY 2023, 21% of all spending by Brighton (M) residents was directed towards these higher-order activity centres. This is a relatively significant volume of Resident Escape Spend.

In addition to this, there is substantial escape spend to:

- Online retail (which accounts for 24% of local resident spending)
- Other neighbourhood and local activity centres located outside Brighton (M), which attracts 26% of residents. Brighton (M) residents direct spending to local neighbourhood offerings in Moonah, Derwent Park and New Town.

These patterns may result from a combination of relatively limited local offerings and the convenience of accessing these centres on the way to (and from) places of work and study. Based on previous analysis of escape and online spend thresholds across Australia, it is reasonable to conclude that there is some scope to re-capture a proportion of this escape spend. This would support growth in local retail.

With respect to local (within-municipality) spending, most Brighton (M) residents direct their spending to Bridgewater, which captures 17% of Resident Local Spend. This is followed by 11% of spending towards other neighbourhood and local activity centres in Brighton (M), including Brighton (S), small retail convenience shops and takeaway dining in Old Beach, Pontville, and Gagebrook-Herdsmans Cove. The approved and planned opening of the Brighton Shopping Centre at the end of 2024 is expected to increase this share of spending to Brighton (S).

6. Bulky Goods Resident Escape Spend and the Local Opportunities

Table 9 summarises the spending distribution by destination for selected Expenditure Categories for FY 2023.

AC Hierarchy	Food, Liquor and Groceries	Food Catering	Apparel, Homeware and Leisure	Bulky Goods	Retail Services
Higher-Order Centres	15%	17%	31%	27%	17%
Bridgewater	44%	9%	5%	8%	1%
Brighton (S)	3%	5%	1%	7%	1%
Brighton Neighbourhood and Local Activity Centres	19%	6%	3%	7%	2%
Online	5%	22%	37%	3%	49%
Other NACs and LACs	14%	42%	22%	49%	30%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Table 9: Share of Retail Spending by Category, FY23
This shows the share of retail spending by Brighton Residents in Activity Centre locations in Southern Tasmania by category of spend. Source: Spendmapp by Geografia, 2024

Spendmapp shows that nearly 75% of spending in bulky goods occurs outside Brighton (M). Notably 27% of this is directed to higher-order activity centres and another 49% goes to bulky goods offerings in other neighbourhood and local centres (particularly Moonah). Figure 11 illustrates the spatial distribution of spending in this category.

Given the high levels of Resident Escape Spend in the category, Spendmapp data shows there may be opportunity to support unmet demand by residents through local provision of bulky goods retail. The extent of retail bulky goods provision is verified and quantified in the following Section of the report.

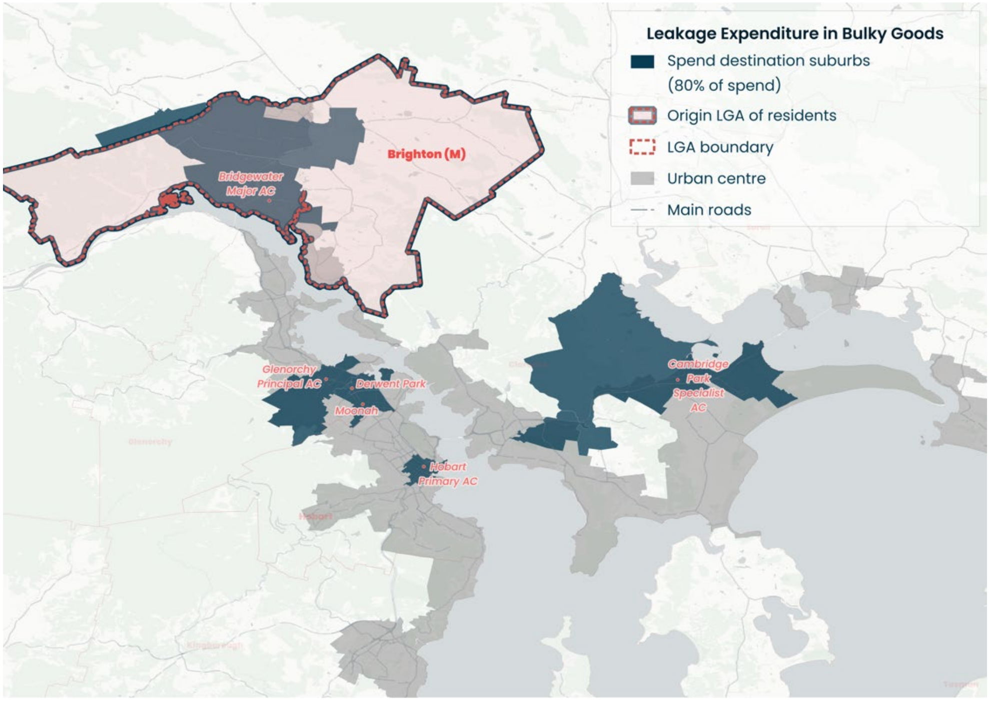


Figure 11: Bulky Goods Resident Escape Spend Catchment, FY23
Source: Spendmapp by Geografia, 2024

Table 9 reveals high Resident Escape spending in Food Catering (17% escapes to higher order centres, mostly Hobart and 42% to other neighbourhood and local activity centres, mostly Moonah).

This is likely due to work commuting and the greater level of food and dining options outside of Brighton (M), with few options available in Brighton (M).

7. Old Beach Experiences the Highest Levels of Escape Spend

Amongst all of Brighton's (M) suburbs, Old Beach has the largest volume of Resident Escape Spend. Nearly $18.0 million goes to higher-order activity centres, including Hobart ($8.0 million) and Glenorchy ($6.5

million). A further $7.7 million goes to other neighbourhood and local centres outside Brighton, including $3.6 million to Moonah and $2.3 million to New Town (Figure 12 and Figure 13).

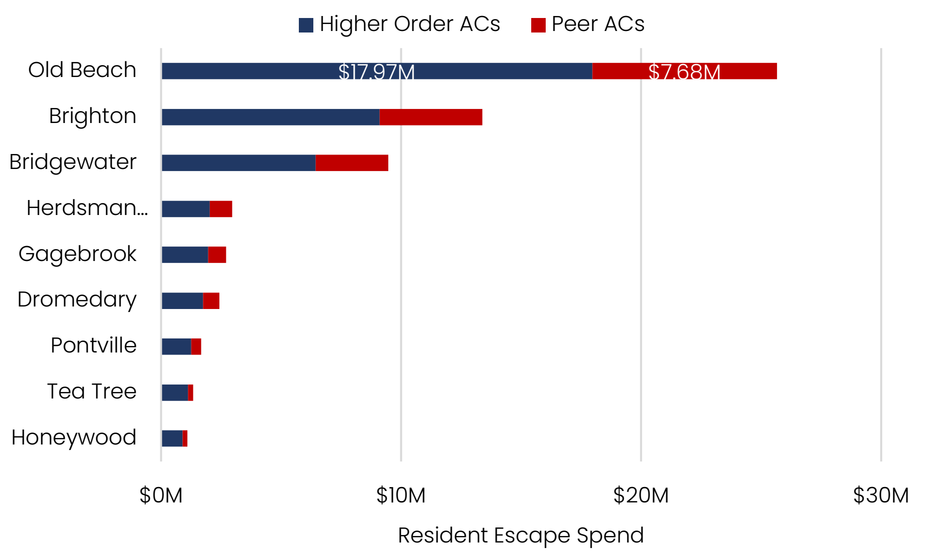


Figure 12: Total Escape Expenditure by Suburb, Brighton (M), FY23
Source: Spendmapp by Geografia, 2024

As with elsewhere, the Resident Escape Spend volume is driven by:

- Lack of local retail offering
- The relative distance of Bridgewater and Brighton (S) to other competing centres
- The convenience of accessing these competing centres on the way to (or from) places of work and study in Hobart.

Equally, as with the other parts of Brighton, the analysis of national data suggests there is scope to reduce this escape spend through improved offerings in the suburb.

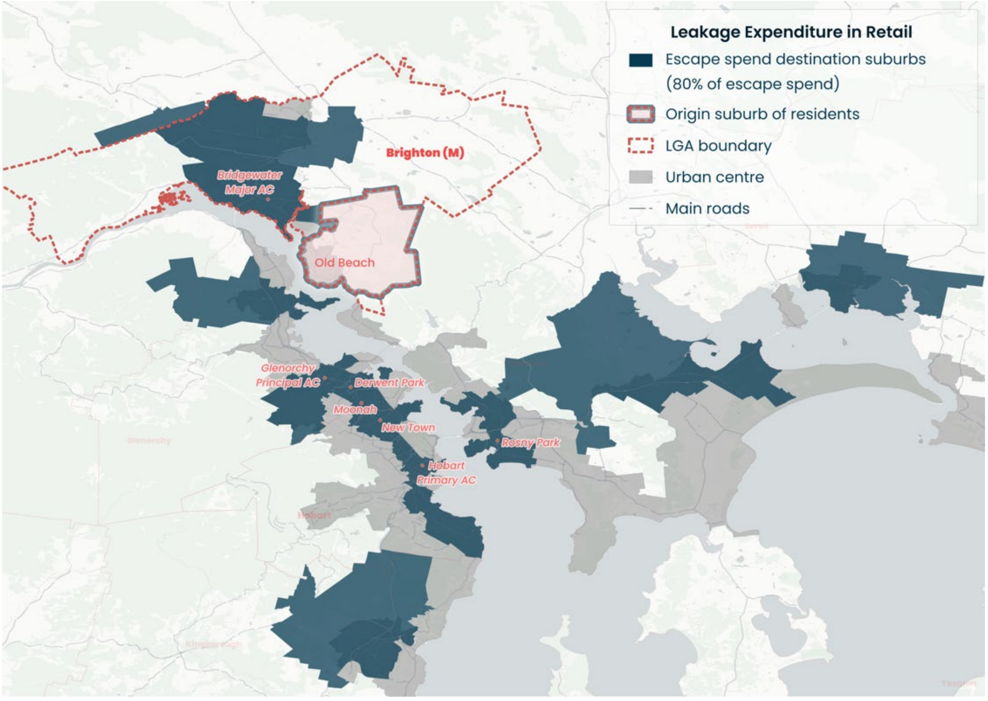


Figure 13: Old Beach Escaped Spending Catchment, FY23
Source: Spendmapp by Geografia, 2024

Summary of Findings

This assessment of Brighton (M) identified the following:

- **Higher than Expected Population Growth:** Brighton's (M) actual population growth consistently surpassed official forecasts.
- **Increasing Retail Demand and AC Prominence:** As population growth continues, retail demand and the prominence of the AC is anticipated to concentrate more heavily in Brighton (S).
- **Modest Job Growth with a Focus on Population-Servicing Sectors:** Jobs in Brighton (M) have grown by 58% over the past decade, with increases in retail, education, and construction, supporting a moderate demand for commercial land use. Notably Transport, Postal and Warehousing job numbers increased significantly.
- **Continued Regional Role of Bridgewater and Brighton (S):** Both areas maintain a regional influence, extending their retail catchment beyond the municipality and playing a crucial role in the wider Southern Tasmania region.
- **High Resident Escape Spend in Bulky Goods:** A significant portion of Brighton (M) residents' spending is directed outside the municipality, with the potential to recapture some, especially in bulky goods and food catering.

- **Resident Escape Spend from Old Beach:** Old Beach has the highest level of Resident Escape Spend in Brighton (M).

4.0 Land Use Needs Analysis

The estimated 19,876 sqm of retail and 2,160 sqm of commercial floorspace in Brighton (M) broadly matches current floorspace demand. Demand is expected to exceed supply as early as 2026 in some locations and, more significantly, in the early 2030s (in both retail and office space). The potential exists for supermarkets (in Brighton (S) and Old Beach, bulky goods (in the LGA) and some recapture of the relatively high level of Resident Escape Spend (particularly in Old Beach).

4.1 SUPPLY AUDIT

Table 10 outlines the review of existing floorspace use supply.

Location	Retail (sqm)	Commercial (sqm)
Bridgewater*	*13,328*	**2,080**
Green Point MAC	4,120	2,000
Cove Hill	8,178	80
Old Main Road	1,000	-
Brighton (S)	**5,431**	**80**
Existing	3,324	80
Development Pipeline	2,107	-
Pontville	**270**	**-**
Old Beach	**390**	**-**
Gagebrook-Herdsmans Cove	**457**	**-**
Total	**19,876**	**2,160**

Table 10: Floorspace Audit Findings
Source: Essential Economics (2018) revised and updated by Geografia in July 2024. *Bridgewater's total floorspace also includes floorspace in Brighton Industrial Estate; Brighton's (S) total floorspace also includes floorspace provision of the forthcoming Brighton Shopping Centre.

A review of the retail and commercial floorspace supply found:

- Bridgewater maintains the largest volume of retail and commercial floorspace, supporting the municipality and region with 13,326 sqm of retail and 2,080 sqm of commercial floorspace.
- The majority of Brighton's (M) commercial floorspace is found in Green Point MAC, which encompasses 2,000 sqm. While this MAC

has a notable retail floorspace of 4,210 sqm, Cove Hill within Brighton (M) has the largest retail floorspace at 8,178 sqm.

- Large retail chains, including Woolworths and Coles, are situated in Bridgewater's Green Point MAC and Cove Hill. Essential services, such as post offices and pharmacies, are found in Bridgewater and Brighton (S).
- Brighton (S) currently has 3,215 sqm and is expected to grow by an additional 2,107 sqm by the end of 2024, following the completion of the Brighton Shopping Centre. This means that, in total, Brighton (S) will have 5,321 sqm of retail floorspace available.
- There are no major Bulky Goods retailers in Brighton (M), except for local hardware stores, e.g. in Brighton Central.
- The remaining centres of Old Beach, Gagebrook-Herdsmans Cove and Pontville have between 270 sqm and 450 sqm in retail floorspace each. Most of the retail is directed towards local convenience retail, local grocers, food and dining, and retail services.
- Notably, despite identifying high levels of spending patterns (in the previous Section), Old Beach only contains an estimated 390 sqm of retail floorspace.

4.2 RETAIL FLOORSPACE NEEDS AND GAPS

Bridgewater

Table 11 outlines the findings of the retail floorspace needs analysis for Bridgewater, combining the retail floorspace needs of Green Point MAC, Cove Hill and Old Main Road.

Category	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Food, Liquor and Groceries	4,225	5,338	6,698	8,220	9,620
Food Catering	1,083	1,520	2,131	2,919	3,800
Apparel, Homeware and Leisure	1,014	1,467	2,108	2,953	3,926
Bulky Goods	503	541	583	617	629
Retail Services	339	451	291	750	891
Total Retail Demand	**7,163**	**9,318**	**12,111**	**15,459**	**18,865**
Existing Retail Supply	13,328				
Retail Needs (Gap)	**-6,165**	**-4,010**	**-1.217**	**2,131**	**5,537**

Table 11: Total Retail Floorspace Demand and Needs (Gaps), Bridgewater, 2026-46
Source: Geografia, 2024

The modelling indicates existing retail floorspace supply will is sufficient to support Bridgewater's retail needs until 2037. This is based on assumptions about the impact of the Brighton Shopping Centre. When opened, the centre is expected to re-direct spending away from Bridgewater's retail offerings; thereby reducing demand for retail land use in Bridgewater in the short-to-medium term.

From 2038 onwards, growth area development opportunities are expected to accelerate population growth in the suburb and, subsequently, the demand for population servicing industries. The result is a total retail floorspace gap of 2,131 sqm in Bridgewater by 2041 and by 2046, a gap of 5,537 sqm (Figure 14).

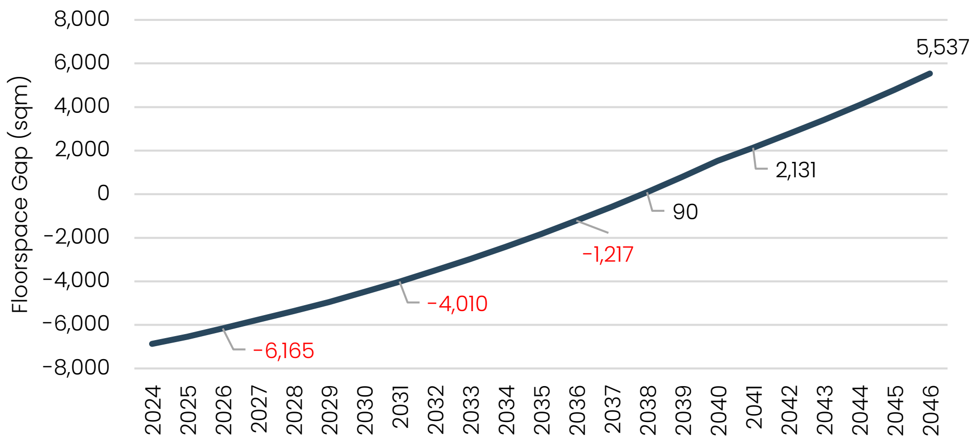
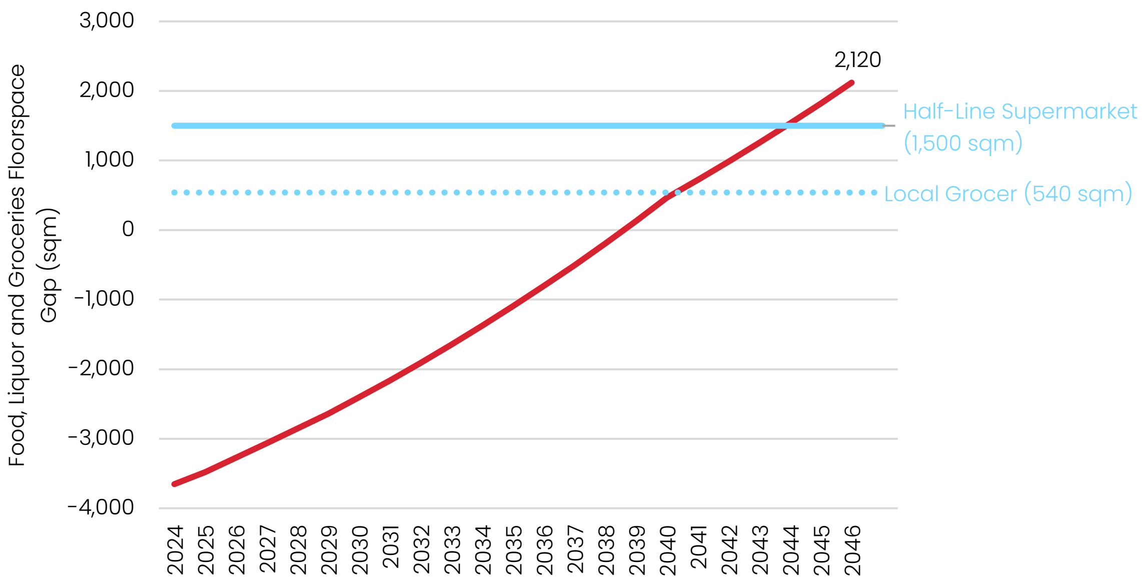


Figure 14: Total Retail Floorspace Gap Forecast, Bridgewater
Source: Geografia, 2024 using Spendmapp, 2024

Specific to local Food, Liquor and Grocery needs, demand can be addressed through various options (e.g., local grocer, half-line supermarket, full-line supermarket[11]), depending on supermarket typology and timing of demand:

1. **Option 1: One Local Grocer, One Half-Line Supermarket**
    - Introduce a local grocer (~540 sqm in floorspace) in Bridgewater in 2041 to address initial demand (Figure 15). This will reduce demand by 540 sqm as it is absorbed and fulfilled by the local grocer.
    - As demand grows and reaches 1,580 sqm in 2046, introduce a half-line supermarket (~1,500 sqm in floorspace) to accommodate the renewed demand.
2. **Option 2: One Half-Line Supermarket**
    - In this scenario, introduce a half-line supermarket (~1,500 sqm) when demand is sufficient in 2044 at 1,535 sqm (Figure 15). This approach consolidates demand into a single phase, allowing it to build over time before being addressed.

Note that there is insufficient demand up until 2046 to support a full-line supermarket (~3,500 sqm in floorspace). A half-line supermarket (~1,500 sqm) remains the largest feasible option until that point.



[11] The retail model uses typical floorspace benchmarks for supermarkets in Australia: full-line (up to 3,500 sqm), half-line (up to 1,500 sqm), and local grocer (up to 540 sqm). While indicative and subject to variation based on urban context and local conditions, these benchmarks have been adopted for this study.

Figure 15: Food, Liquor and Groceries Floorspace Gap Forecast, Bridgewater
Source: Geografia, 2024 using Spendmapp, 2024

Overall, the retail modelling assessment shows that while current retail services should be sufficient out to 2037, higher population growth and growth area development may create demand for new retail allocations.

Although retail demand is expected to grow at modest levels, the model accounts for spending that should defer to Brighton (S) due to its status as an emerging growth suburb. In that regard, the modelling suggests that existing retail supply is sufficient to cater to retail needs in the short to medium term, taking into account local retail needs for growing activity centres such as Brighton (S).

Brighton (S)

Table 12 outlines the findings of the retail floorspace needs analysis for Brighton (S), combining the retail floorspace needs of Brighton RSC, the Highway Services Precinct and South Brighton.

Category	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Food, Liquor and Groceries	2,498	3,186	4,046	5,012	5,896
Food Catering	915	1,288	1,815	2,495	3,256
Apparel, Homeware and Leisure	662	968	1,395	1,962	2,622
Bulky Goods	504	555	605	646	662
Retail Services	475	625	809	1,019	1,214
Total Retail Demand	**5,055**	**6,621**	**8,669**	**11,134**	**13,650**
Existing Retail Supply*	5,431				
Retail Needs (Gap)	**-376**	**1,190**	**3,238**	**5,703**	**8,219**

Table 12: Total Retail Floorspace Demand and Needs (Gaps), Brighton (S), 2026-46
*Includes forthcoming provision of Brighton Shopping Centre's floorspace. Source: Geografia, 2024

The retail land use analysis indicates sufficient retail floorspace supply in Brighton (S) until 2027 (again, as a result of the Brighton Shopping Centre development). Thereafter, population growth may increase the demand for more retail land in the suburb. The estimate is that, by 2041, the retail floorspace gap will be 3,237 sqm, and by 2046, 5,225 sqm (Figure 15).

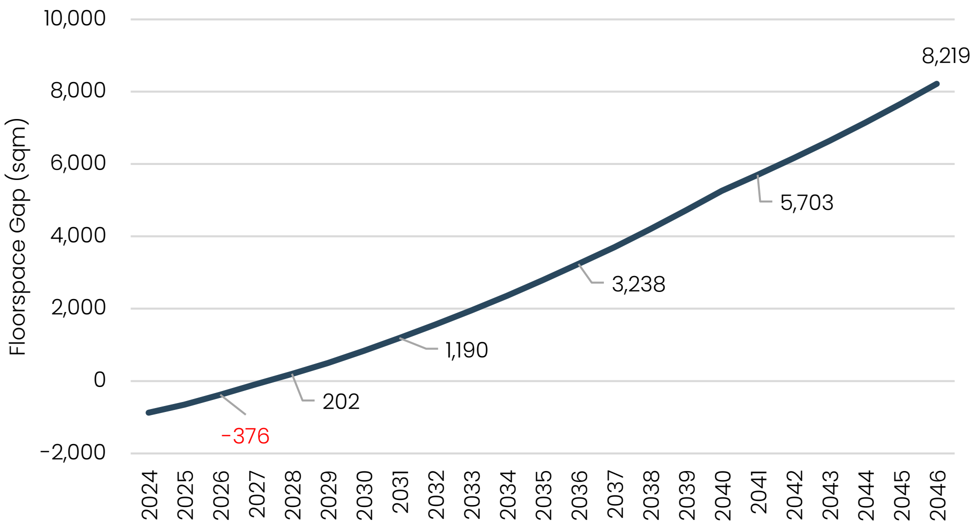


Figure 16: Total Retail Floorspace Gap Forecast, Brighton (S)
Source: Geografia, 2024 using Spendmapp, 2024

Specific to local Food, Liquor and Groceries considerations, the assessment identifies two viable options to meet future demand:

1. **Option 1: One Local Grocer, One Half-Line Supermarket**
   - Introduce a local grocer (~540 sqm in floorspace) in Brighton (S) in 2028 to address initial demand (Figure 17). This will absorb and fulfill a portion of demand.
   - As demand continues to grow, reaching 1,692 sqm in 2038, introduce a half-line supermarket (~1,500 sqm in floorspace) to accommodate the renewed demand.
2. **Option 2: One Full-Line Supermarket**
   - Introduce a full-line supermarket (~3,500 sqm in floorspace) in 2045 when demand reaches 3,695 sqm (Figure 17).

Based on current catchment assumptions, Brighton (S) is likely to support the development of a full-line supermarket within the 25-year time horizon of the model forecasts.

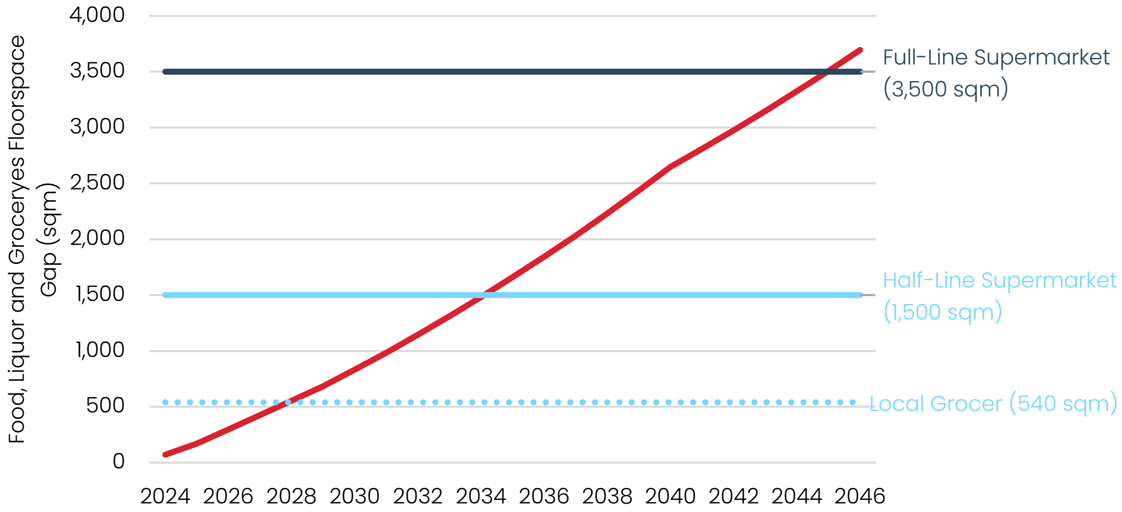


Figure 17: Food, Liquor and Groceries Floorspace Gap Forecast, Brighton (S)
Source: Geografia, 2024 using Spendmapp, 2024

In summary, the retail modelling finds that while there are sufficient retail services in Brighton (S), accelerated population growth may change this from 2027. This takes into account the planned opening of the Brighton Shopping Centre and a share of local resident spending that defers to higher-order centres. In particular, the opening of the local supermarket provision in Brighton Shopping Centre fulfils the role of Brighton as a Rural Services Centre (as identified in the policy review).

Pontville

Table 13 summarises the findings of the retail floorspace needs analysis for the suburb of Pontville.

Category	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Food, Liquor and Groceries	0	0	0	0	0
Food Catering	193	228	262	291	302
Apparel, Homeware and Leisure	195	228	261	288	300
Bulky Goods	0	0	0	0	0
Retail Services	216	252	288	318	331
Total Retail Demand	**604**	**708**	**810**	**898**	**932**
Existing Retail Supply	270				0
Retail Need (Gap)	**334**	**438**	**540**	**628**	**662**

Table 13: Total Retail Floorspace Demand and Needs (Gaps), Pontville, 2026-46
Source: Geografia, 2024

There is currently a gap in retail floorspace supply in the suburb of about 334 sqm. This analysis is conditional on Pontville maintaining its current role in catering both to residents and tourists. Assuming this, future land use allocations could be justified in additional food catering retail (restaurants and dining), apparel, homeware and leisure (e.g. antique shops, furniture stores, etc.) and retail services (barbers, salons, etc.).

By the early 2030s, population and visitor growth are expected to increase the retail floorspace gap of Pontville. Specifically, by 2041, the suburb may require an additional 628 sqm and by 2046, this gap may be 662 sqm (Figure 18). By contrast, the model indicates there is no additional demand for grocery retail.

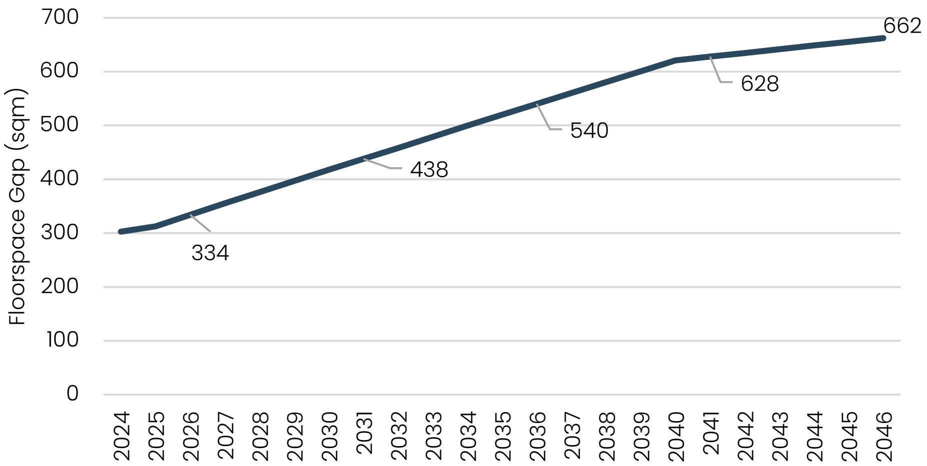


Figure 18: Total Retail Floorspace Gap Forecast, Pontville
Source: Geografia, 2024 using Spendmapp, 2024

Old Beach

Table 14 outlines the findings of the retail land use and gap analysis for Old Beach suburb, combining the retail land use needs of residential development areas and growth area opportunities, including those being serviced by Jetty Road retail strip and the potential Tivoli Green development.

Category	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Food, Liquor and Groceries	1,704	2,208	2,971	3,822	4,511
Food Catering	329	474	709	1,014	1,329
Apparel, Homeware and Leisure	449	661	1,008	1,471	1,970
Bulky Goods	0	0	0	0	0
Retail Services	540	7,07	961	1,249	1,490
Total Retail Demand	**3,022**	**4,050**	**5,650**	**7,556**	**9,300**
Existing Retail Supply	390				
Retail Needs (Gap)	**2,632**	**3,660**	**5,260**	**7,166**	**8,910**

Table 14: Total Retail Floorspace Demand and Needs (Gaps), Old Beach, 2026-46
Source: Geografia, 2024

The analysis indicates a gap in retail floorspace supply in Old Beach estimated at 2,632 sqm. As identified in the Economic Context section, a major driver of these trends is the lack of local retail options in Old Beach and the high levels of Resident Escape Spend to centres outside Brighton.

By the early 2030s, population growth is expected to expand this retail gap. Specifically, by 2036, there will be an estimated total retail floorspace gap of 3,660 sqm, and by 2046, this gap is expected to grow to 8,910 sqm (Figure 19).

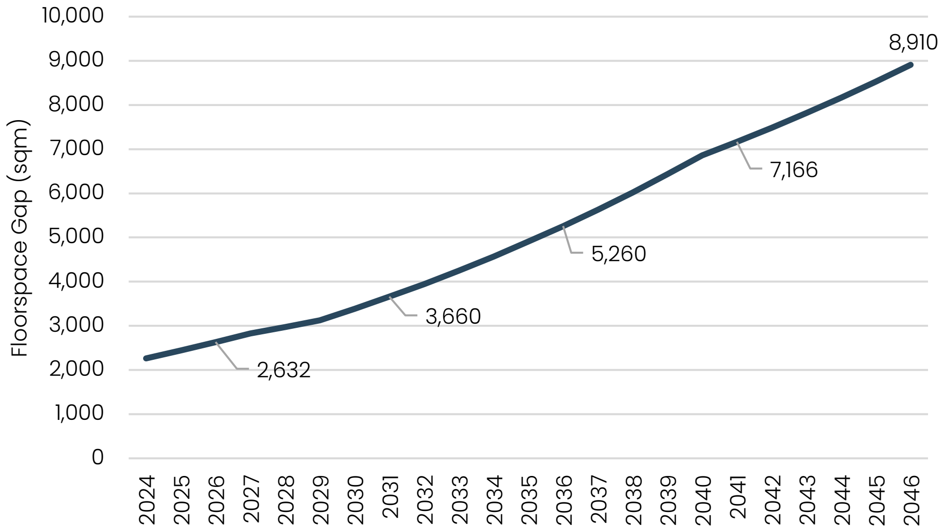


Figure 19: Total Retail Floorspace Gap Forecast, Old Beach
Source: Geografia, 2024 using Spendmapp, 2024

With respect to Food, Liquor and Grocery needs, the model identifies two viable options:

1. Option 1: Two Half-Line Supermarkets (or One Half-Line Supermarket, One Local Grocer)
    - Introduce a half-line supermarket (~1,500 sqm in floorspace) in 2029 to address initial demand (Figure 20), reducing unmet demand by 1,500 sqm.
    - As demand builds and reaches 1,615 sqm in 2039, a second half-line supermarket (~1,500 sqm) can be introduced to meet the renewed demand. Alternatively, a local grocer can be introduced earlier on in 2033.
2. Option 2: One Full-Line Supermarket, One Local Grocer
    - Introduce a full-line supermarket (~3,500 sqm) in Old Beach in 2042 to address initial demand (Figure 20), absorbing and fulfilling a portion of it.
    - As demand continues to grow, a local grocer (~540 sqm in floorspace) can be introduced in 2046 to accommodate additional demand.

Overall, demand projects indicate that by 2046, there will be sufficient demand to support a full-line supermarket (~3,500 sqm).

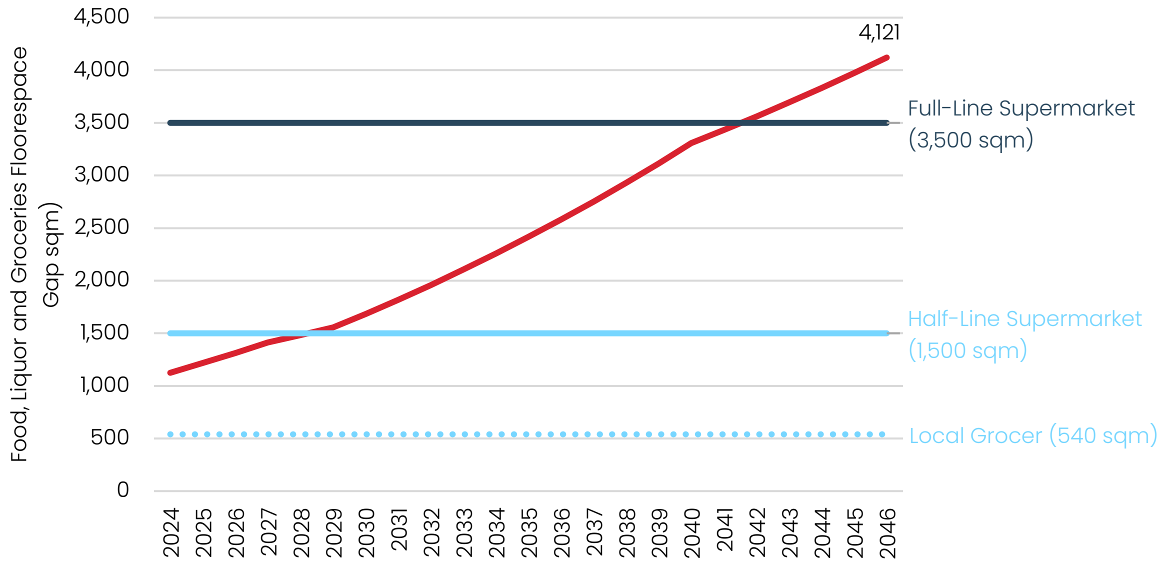


Figure 20: Forecast Food, Liquor and Groceries Floorspace Gap, Old Beach
Source: Geografia, 2024 using Spendmapp, 2024

Gagebrook-Herdsmans Cove

Table 15 outlines the findings of the retail land use and gap analysis for the combined suburbs of Gagebrook and Herdsmans Cove.

Category	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Food, Liquor and Groceries	396	460	530	607	693
Food Catering	73	94	120	153	194
Apparel, Homeware and Leisure	0	0	0	0	0
Bulky Goods	44	45	46	46	46
Retail Services	0	0	0	0	0
Total Retail Demand	**513**	**599**	**696**	**807**	**933**
Existing Retail Supply	457				
Retail Needs (Gap)	**56**	**142**	**239**	**350**	**476**

Table 15: Retail Floorspace Demand and Needs (Gaps), Gagebrook-Herdsmans Cove
Source: Geografia, 2024

The retail land use analysis shows a gap of retail floorspace in the suburbs of an estimated 56 sqm. That is, current demand is very close to being met by current supply. This is likely a result of the proximity to Bridgewater MACs and Green Point.

By the early 2030s, population growth is expected to increase retail floorspace demand, with a total retail floorspace gap of 239 sqm by 2036 and 476 sqm by 2046. Small allocations in additional retail land uses would be appropriate to cater to any future demand needs in the suburbs (Figure 21).

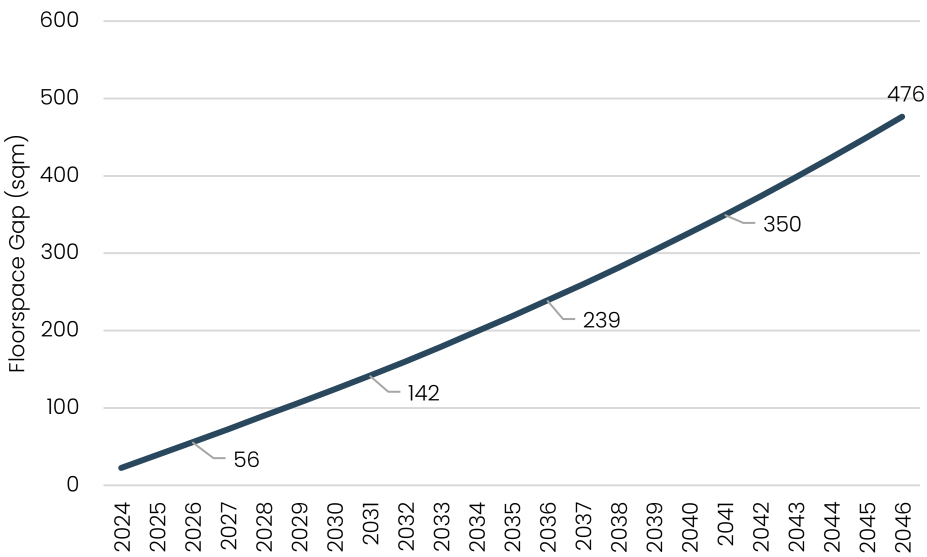


Figure 21: Total Retail Floorspace Gap Forecast, Gagebrook-Herdsmans Cove
Source: Geografia, 2024 using Spendmapp, 2024

Regarding local grocery needs, the suburbs are currently serviced by an IGA. While demand is expected to grow, the future retail demand falls short of supporting another local grocer. Instead, future needs could potentially be supported through expanding the floorspace of the existing operator (subject to other planning considerations) or providing expanded retail allocations to neighbouring centres, i.e. Old Beach and Bridgewater (Figure 22).

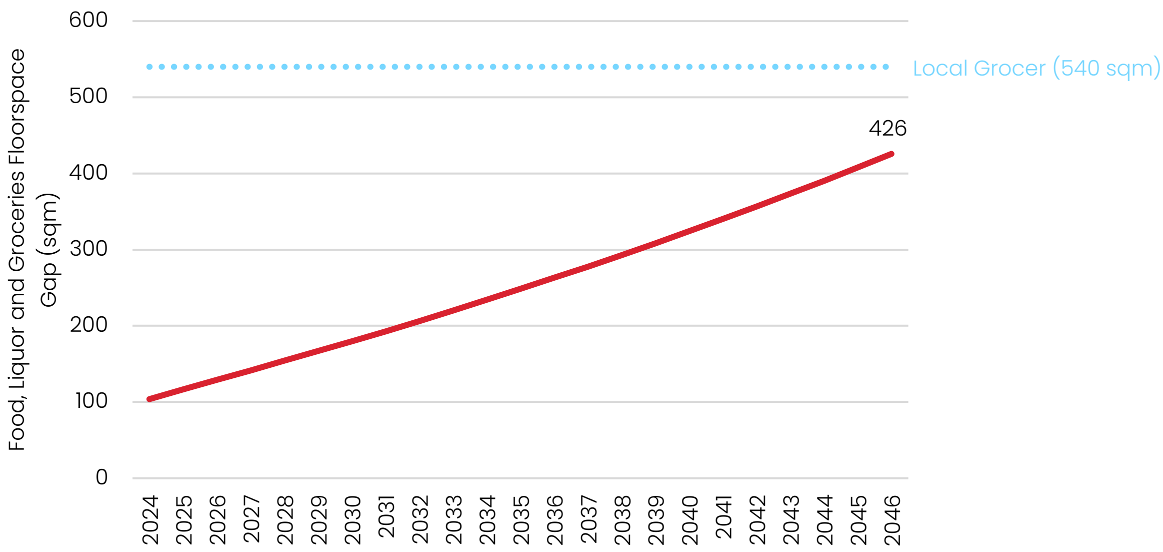


Figure 22: Food, Liquor and Groceries Floorspace Gap Forecast, Gagebrook-Herdsmans Cove
Source: Geografia, 2024 using Spendmapp, 2024

Bulky Goods

Table 16 shows total retail demand from Brighton's (M) residents for bulky goods retail, i.e. the quantum of bulky goods floorspace that can be reasonably recaptured by Brighton that escapes outside of the municipality.

It depicts latent floorspace demand that could be supported by Brighton (M) resident spending. The model accounts for existing shares of spending to higher-order activity centres and maintains their shares to ensure that this is consistent with the current centre hierarchy.

As there is no large format bulky goods retailer, it is assumed the current serviceable supply is effectively zero. Consequently, there is a gap of at least 3,568 sqm in bulky goods floorspace in Brighton (M). This is estimated to grow to 5,012 sqm by 2046.

While the model suggests local demand is unlikely to support a large format bulky goods retailer, Brighton (M) residents could potentially support a half-line bulky goods retail outlet (around 4,000 sqm).

Bulky Goods	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Total Bulky Goods Demand	3,568	3,992	4,477	4,878	5,012
Floorspace Supply of Large Format Bulky Goods Retailers	-				
Bulky Goods Needs (Gap)	3,568	3,992	4,477	4,878	5,012

Table 16: Resident Demand for Bulky Goods Floorspace and Needs (Gaps), Brighton (M)
Source: Geografia, 2024

A key consideration for bulky goods retail assessment is to account for a potentially large catchment outside the municipality, consistent with the regional roles Brighton RSC and Bridgewater MAC. [12] Given existing providers in Glenorchy, Moonah, Hobart (on the other side of the river) and Cambridge Park, it is difficult to establish the geographical extent of a catchment that could potentially be supported by a northern regional-servicing bulky goods retailer.

To consider non-resident spending to a potential Brighton (M) bulky goods centre, the assessment uses Spendmapp National database to identify existing ratios of resident to non-resident spending in bulky goods retail for major centres in Tasmania, i.e. Hobart and Launceston. The model then applies these ratios (and their ranges) to estimate the total bulky goods floorspace demand that accounts for the potential pool of resident and non-resident expenditure.

Figure 23 depicts the estimated demand for bulky goods floorspace considering local and non-local (i.e. residents from outside Brighton) spending pools in the category. The model identifies:

- An existing retail gap of over 9,000 sqm in bulky goods floorspace in Brighton (M)
- This gap is estimated to grow to 13,000 sqm by 2046

Given high levels of uncertainty in the modelling, Figure 23 also depicts the ranges of potential bulky good floorspace that could conceivably be supported in Brighton (M):

[12] As there is no current operator, there is no spend data available for mapping the potential catchment.

- At the lower level, these are effectively retail demand from Brighton residents only, which sits close to 4,000 sqm of bulky goods floorspace – sufficient to support a half-line bulky goods retailer.
- At the higher level, Brighton could potentially support over 13,000 sqm of bulky goods retail floorspace in 2026, growing to a need of over 18,000 sqm. These upper bound estimates assume that Brighton (M) plays a significant regional role in servicing a wide northern regional catchment.

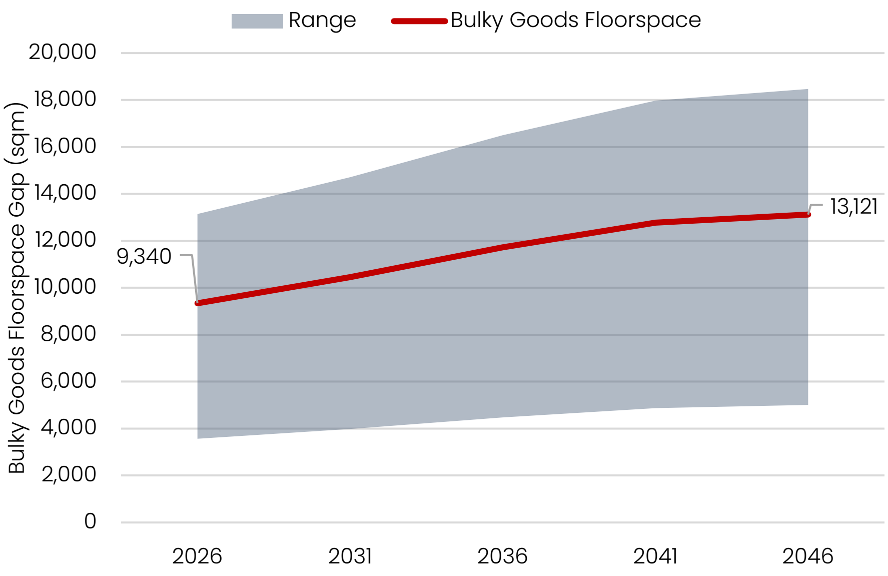


Figure 23: Estimated Bulky Goods Floorspace Gap, Brighton (M)
This shows demand for bulky goods floorspace based on both resident and non-resident consumer demand. The range considers variation in capturing spending from outside the municipality, that is, Brighton (M) serving a potential regional function in its bulky goods retail provision. The range is a 90% confidence interval.
Source: Geografia, 2024 using Spendmapp, 2024

4.3 COMMERCIAL FLOORSPACE NEEDS AND GAPS

The analysis of commercial floorspace and land demand uses 2021 estimates as the baseline and is separated into public and private sector requirements.

Office-Based Jobs Forecasts

Table 17 summarises the commercial employment forecasts. That is, the total number of office-based jobs in Brighton (M) by the public and private sectors. The commercial employment forecasts account for office-based jobs by industry sector and factors in home-based employment in the municipality.

According to the analysis, in 2021, Brighton (M) supported over 90 public sector office-based jobs. This is concentrated in local government, as well as some jobs in health, education and defence. The model suggests marginal growth in office-based public-sector jobs (an increase from 90 to 99 jobs by 2046, or 10%). These forecasts assumed a business-as-usual scenario, projecting future jobs from historical trends seen over the past 15 years in Brighton (M) (Table 17).

It is important to note that public sector job growth is sensitive to unpredictable political and policy changes. For example, the total job count in Brighton (M) could increase significantly if a State agency were to be relocated to the municipality.

As most Brighton (M) office jobs are in the private sector and this sector is less subject to unpredictable step changes, we can be more confident of the forecast trajectory that sees the job count increase from 178 jobs in 2021 to 380 by 2046 (Table 17).

Total Office-Based Jobs	2021	2026	2031	2036	2041	2046
Public	90	90	95	96	98	99
Private	178	220	262	304	344	380
Total	**268**	**310**	**357**	**401**	**442**	**480**

Table 17: Total Commercial Office-Based Jobs Forecast, Brighton (M)
Source: Geografia, 2024

Future Commercial Floorspace and Land Needs

Table 18 summarises the commercial floorspace supply and demand in the municipality. The current demand estimate is over 2,240 sqm in public sector office floorspace, currently being serviced through a combination of Council offices, and school and health facilities. The projected growth to 2046 takes this to 2,477 sqm. This suggests future demand can be supported within existing land allocations for the public sector (Table 18).

By contrast, there is an estimated demand for 4,457 sqm in private sector office floorspace, but only an estimated supply of 2,755 sqm. The current gap is likely being serviced by more affordable, office-based facilities in industrial precincts and warehouses. The 2021 gap of 1,702 sqm in private sector office floorspace in Brighton (M) is expected to grow to 4,849 sqm in 2036 and eventually to 6,757 sqm in 2046.

The estimated demand growth warrants the allocation of more appropriate zonings and precincts. As with the retail modelling, the model does not include locational recommendations, which should be determined by planning considerations.

Commercial	2021 (sqm)	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Public Demand	2,240	2,309	2,366	2,412	2,448	2,477
Private Demand	4,457	5,490	6,554	7,604	8,600	9,512
Total Commercial Demand	**6,697**	**7,800**	**8,920**	**10,015**	**11,048**	**11,989**
Commercial Floorspace (Private)	2,755					
Commercial Floorspace Gap (Private)	**1,702**	**2,735**	**3,799**	**4,849**	**5,845**	**6,757**

Table 18: Commercial Floorspace Demand and Needs (Gaps), Brighton (M), 2021-2046
Source: Geografia, 2024

4.4 RETAIL AND COMMERCIAL LAND USE NEEDS

Bridgewater

Under a medium land use scenario, the model indicates Bridgewater will require an additional allocation of 9,200 sqm appropriately zoned land for 2046 (Table 19). In summary, sufficient retail floorspace currently exists to support the centres' functionality in the short term. However, longer-term demand (>15-year time horizon) will need to be accounted for, particularly in light of the potential growth area population in Bridgewater.

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	-6,165	-4,010	-1,217	2,131	5,537
Medium	-10,275	-6,684	-2,028	3,552	9,229
High	-15,413	-10,026	-3,042	5,328	13,843

Table 19: Total Retail Land Needs, Bridgewater, 2026-46
Source: Geografia, 2024

Table 20 outlines the projected split between Food, Liquor and Groceries and all other retail categories in 2046 under different land use scenarios.

Land Use Scenario in 2046	Low (sqm)	Medium (sqm)	High (sqm)
Food, Liquor and Groceries	2,120	3,534	5,300
All Other Retail Categories	3,417	5,695	8,543
Total	**5,537**	**9,229**	**13,843**

Table 20: Retail Land Needs by Category, Bridgewater, 2046
Source: Geografia, 2024

Brighton (S)

Under a medium land use scenario, Brighton (S) may require an additional allocation of about 13,700 sqm appropriately zoned land for future retail needs (Table 21).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	-376	1,190	3,238	5,703	8,219
Medium	-627	1,984	5,397	9,504	13,699
High	-941	2,976	8,096	14,256	20,548

Table 21: Total Retail Land Needs, Brighton (S), 2026-2046
Source: Geografia, 2024

Table 22 presents the projected distribution of Food, Liquor and Groceries compared to all retail categories in 2046 across various land needs scenarios.

Land Use Scenario in 2046	Low (sqm)	Medium (sqm)	High (sqm)
Food, Liquor and Groceries	3,695	6,158	9,237
All Other Retail Categories	4,525	5,541	11,311
Total	**8,219**	**13,699**	**20,548**

Table 22: Retail Land Needs by Category, Brighton (S), 2046
Source: Geografia, 2024

Pontville

Under a medium land use scenario, Pontville will require an additional allocation of 1,100 sqm appropriately zoned land for future retail needs (Table 23).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	334	438	540	628	662
Medium	557	730	900	1,046	1,104
High	835	1,095	1,351	1,570	1,656

Table 23: Total Retail Land Needs, Pontville, 2026-46
Source: Geografia, 2024

The projected breakdown of Food, Liquor and Groceries versus all other retail categories in 2046 under different land scenarios is shown in Table 24.

Land Use Scenario in 2046	Low (sqm)	Medium (sqm)	High (sqm)
Food, Liquor and Groceries	0	0	0
All Other Retail Categories	662	1,104	1,656
Total	662	1,104	1,656

Table 24: Retail Land Needs by Category, Pontville, 2046
Source: Geografia, 2024

Old Beach

Under a medium land use scenario, Old Beach will require an additional allocation of 14,850 sqm appropriately zoned land by 2046 for future retail needs (Table 25).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	2,632	3,660	7,166	5,260	8,910
Medium	4,387	6,099	11,943	8,767	14,850
High	6,581	9,149	17,915	13,150	22,274

Table 25: Total Retail Land Needs, Old Beach, 2026-2046
Source: Geografia, 2024

Table 26 details the forecasted allocation of Food, Liquor and Groceries alongside all other retail categories in 2046 for each land scenario.

Land Use Scenario in 2046	Low (sqm)	Medium (sqm)	High (sqm)
Food, Liquor and Groceries	4,121	6,868	10,302
All Other Retail Categories	4,789	7,981	11,972
Total	8,910	14,850	22,274

Table 26: Retail Land Needs by Category, Old Beach, 2046
Source: Geografia, 2024

Gagebrook-Herdsmans Cove

Under a medium land use scenario, the suburb will require an additional allocation of 800 sqm appropriately zoned land by 2046 for future retail needs (Table 27).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	56	142	239	350	476
Medium	93	236	398	583	794
High	139	354	598	874	1,191

Table 27: Total Retail Land Needs, Gagebrook-Herdsmans Cove, 2026-2046
Source: Geografia, 2024

The distribution of Food, Liquor and Groceries compared to other retail categories, as projected under varying land scenarios, in 2046 is summarised in Table 28.

Land Use Scenario in 2046	Low (sqm)	Medium (sqm)	High (sqm)
Food, Liquor and Groceries	426	709	1,064
All Other Retail Categories	51	84	127
Total	**476**	**794**	**1,191**

Table 28: Retail Land Needs by Category, Gagebrook-Herdsmans Cove (S), 2046
Source: Geografia, 2024

Bulky Goods

Under the medium land use scenario, Brighton (M) is projected to require an additional 43,000 sqm of appropriately zoned land by 2046. In a high land use scenario, this requirement increases to approximately 92,000 sqm (Table 29).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	7,136	7,983	8,954	9,757	10,025
Medium	31,134	34,829	39,063	42,565	43,736
High	65,747	73,548	82,490	89,886	92,358

Table 29: Total Bulky Goods Land Needs, Brighton (M), 2021-2046
Source: Geografia, 2024

Commercial

Under the medium land use scenario, an additional 11,000 sqm of appropriately zoned land may be required by 2046 to meet the private sector floorspace needs in Brighton (M) (Table 30).

Land Use Scenario	2026 (sqm)	2031 (sqm)	2036 (sqm)	2041 (sqm)	2046 (sqm)
Low	2,735	3,799	4,849	5,845	6,757
Medium	4,559	6,331	8,081	9,742	11,262
High	6,838	9,497	12,122	14,613	16,892

Table 30: Total Commercial Land Needs, Brighton (M), 2021-2046
Source: Geografia, 2024

4.5 SUMMARY

Figure 24 summarises the aggregated retail floorspace needs (excluding large-format bulky goods) by location for 2046. This is in addition to the estimated demand for 5,165 sqm of bulky goods floorspace and 6,757 sqm of commercial floorspace.

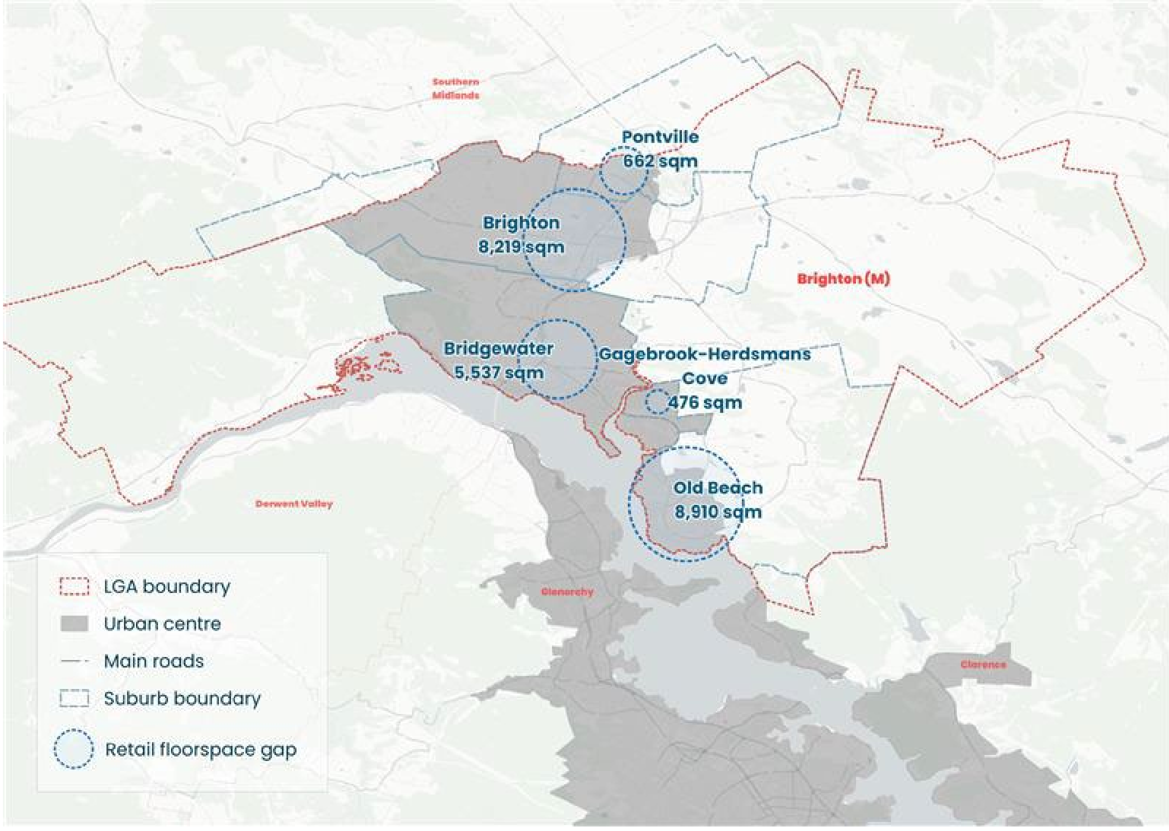


Figure 24: Aggregated Retail Floorspace Needs (Gaps) by 2046
Source: Geografia, 2024

Retail and commercial land use needs by location for 2046 are summarised as follows in Table 31, broken down by categories of interest and land use scenario.

Location	Category	Land Use Scenario in 2046 (sqm)		
		Low	Medium	High
Bridgewater*	Food, Liquor and Groceries	2,120	3,534	5,300
	All Other Retail Categories	3,417	5,695	8,543
	Total	**5,537**	**9,229**	**13,843**
Brighton	Food, Liquor and Groceries	3,695	6,158	9,237
	All Other Retail Categories	4,525	5,541	11,311
	Total	**8,219**	**13,699**	**20,548**
Pontville	Food, Liquor and Groceries	0	0	0
	All Other Retail Categories	662	1,104	1,656
	Total	**662**	**1,104**	**1,656**
Gagebrook-Herdsmans Cove	Food, Liquor and Groceries	426	709	1,064
	All Other Retail Categories	51	84	127
	Total	**476**	**794**	**1,191**
Old Beach	Food, Liquor and Groceries	4,121	6,868	10,302
	All Other Retail Categories	4,789	7,981	11,972
	Total	**8,910**	**14,850**	**22,274**
Brighton (M) (LGA-Wide)	Total Retail (Exc. Large Format Bulky Goods)	23,805	39,675	59,512
	Total Bulky Goods	10,025	43,736	92,358
	Total Commercial	6,757	11,262	16,892

Table 31: Retail and Commercial Land Use Needs by 2046
Source: Geografia, 2024. *Bridgewater includes Green Point, Cove Hill, Old Main Road and Boyer Road.

5.0 Appendix

5.1 THE TASMANIAN PLANNING SYSTEM

The Tasmanian Planning System has undergone significant changes, with several planning reforms and reviews. Most notable are the transition to a state-wide scheme, the introduction of the Tasmanian Planning Policies (TPPs) and the regional planning framework review, which in turn will require the review of all three regional land use strategies (Figure 25).

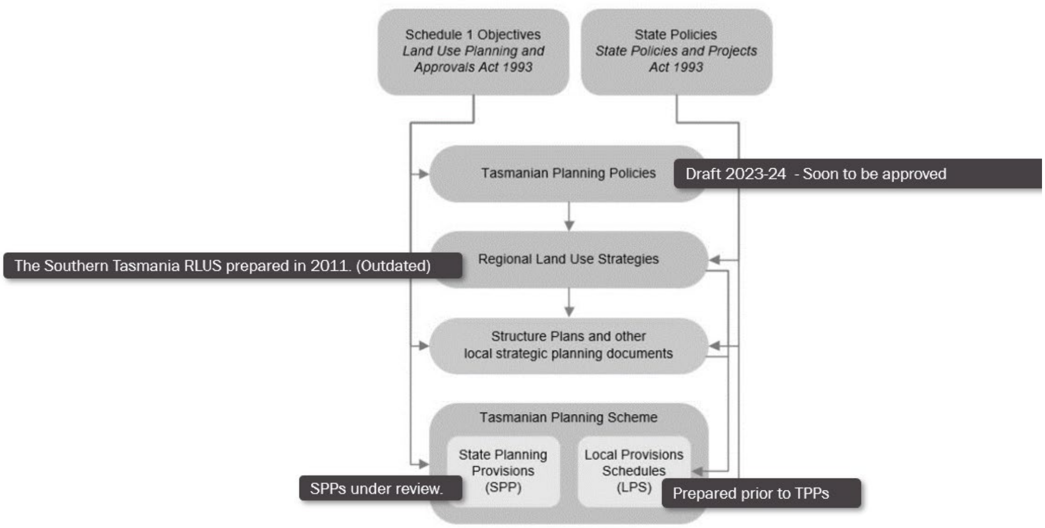


Figure 25: Hierarchy of Planning Instruments
Source: Regional Planning Framework Discussion Paper, 2022

5.2 STATE-LEVEL POLICIES AND PLANS

Legislative Framework

The Tasmanian legislative framework includes the following Acts and Policies that may be relevant for the preparation and implementation of the Strategy:

- Land Use Planning and Approvals Act 1993
- Historic Cultural Heritage Act 1993
- Aboriginal Heritage Act 1993
- Local Government Act 1993

- Protection of Agricultural Land 2009
- National Environmental Protection Measures.

Draft Tasmanian Planning Policies

The Tasmanian Planning Policies (TPPs) is a high-level policy framework to inform strategic land use planning, including the preparation of the State Planning Provisions (SPPs) of the Tasmanian Planning Scheme (TPS) and the regional land use strategies.

While the TPPs have not been gazetted, Mesh considers them to be seriously considered in the preparation of strategic documents. The TPPs have undergone rounds of public consultation, have been independently reviewed by the Tasmanian Planning Commission and are expected to be approved by the Minister in late 2024 or early 2025. Once approved, the TPS will inform the preparation of the outdated three regional land use strategies.

There are a total of seven draft policies. Particularly relevant to this background report are the policies, strategies and guidelines found under 'Settlement' (Table 32), 'Sustainable Economic Development' (Table 33) and 'Planning Processes' (Table 34).

SETTLEMENT

Settlement		
Policy	**Key Strategies**	**What This Means for the Brighton Activity Centre Strategy**
Growth	Provide for at least a 15-year supply of land; prioritise consolidation and re-development within existing settlements and integrate with existing transport systems Prioritise growth of settlements that are within the higher tiers of the settlement hierarchy. Require the preparation of structure plans for effective land use and development planning. Identify the role and function of activity centres within settlements and provide for use and development that compliments and supports that role and function. Encourage the concentration of commercial, administrative, major retail, entertainment and cultural use and development within activity centres that are highly accessible by public and active transport. Prioritise the sustainable expansion, consolidation and redevelopment and intensification of existing activity centres prior to the development of new activity centres.	The Strategy should seek to: • Prioritise existing settlements, connections with transport systems and generally follow the growth settlement strategy. • Provide for use and development that compliments and supports the role and function of activity centres. • Prioritise economic growth in activity centres accessible by public and active transport. • Be implemented/aided by structure plans.
Liveability	Facilitate access to, and a diverse range, of employment opportunities in settlements by the provision of public transport and enabling business that promote local characteristics, resources and produce. Increase opportunities for innovation, technology and research to support established and emerging industries. Provide for connectivity within settlements, especially between residential areas, activity centres and open space networks. Provide for a range of cultural, recreational and community facilities that support wellbeing, social cohesion and cultural identity and understanding. Facilitate place-making and recognise the contribution it makes to the local economy, environmental amenity and social wellbeing of the community.	In identifying the role and function of each centre and subsequent recommendations, the strategy should consider: • Existing and planned public and active transport opportunities. • Opportunities for innovation, research and emerging industries. • Opportunities for a range of cultural, recreational and community facilities.

Settlement		
Social Infrastructure	Provide for a sufficient supply of land to support the communities existing and forecast demand for social infrastructure. Facilitate co-location of suitable and compatible social infrastructure.	Ensure the Strategy considers the need to protect and provide for social infrastructure within activity centres (school, health care, libraries, social services, and child and aged care).
Settlement Types	Promote the vibrancy and character of specific activity centres, hubs or inner-city locations that have good connectivity, housing choices and access to goods and services that support urban lifestyles.	In addition to economic growth considerations, ensure the Strategy supports the creation of activity centres that are vibrant and support urban lifestyles.
Housing	Encourage higher density in locations that are within close proximity to an activity centre.	Ensure the Strategy recognises and provides for the need to accommodate higher density residential developments in activity centres.

Table 32: Settlement Policy Review Summary
Source: Mesh, 2024

SUSTAINABLE ECONOMIC DEVELOPMENT

Tasmanian natural resources and proximity to Antarctica are key for the State's economic prosperity. At the same time, its isolation from mainland Australia limits the State’s capacity to competitively access the northern hemisphere and Asian Markets. Concurrent with this, one of Tasmanian’s key challenges for economic growth is a decline in the skilled workforce, driven by an ageing population base.

The State policy recognises that planning alone cannot drive economic growth nor can it prevent a declining workforce. However, it still has a role to play by:

- Supporting the provision of digital infrastructure
- Ensuring ports and strategic transport networks are efficient to allow access to global markets
- Supporting the creation of liveable cities that encourage migration and retention of young adults
- Supporting the establishment of higher education institutions.

The following principles are identified as the role of planning in the sustainable economic development of the state:

- Allocating sufficient land in appropriate locations to support various economic activities
- Protecting allocated land from incompatible use and development
- Supporting the efficient use of infrastructure and coordinated delivery of new infrastructure
- Identifying and supporting emerging and innovative industries
- Promoting diversification to strengthen the resilience of the economy
- Protecting the resources and values that are relied on for sustainable economic development.

This policy is further divided into seven themes of which 'Tourism', 'Industry', 'Business and Commercial', 'Innovation and Research' and 'Transport Modes' are considered of relevance for the Brighton Activity Centre Strategy (Table 33).

Sustainable Economic Development		
Sub-Policy	Key Strategies	What This Means for the Brighton Activity Centre Strategy
Tourism	Identify existing and potential key tourism sites or destinations and their role. Support unique, diverse and innovative tourism experiences that support the Tasmanian brand. Facilitate the provision of infrastructure, housing and services, where appropriate, to support tourism and hospitality employees and support the growth of sustainable tourism use and development. Promote the growth and investment in recreational, art and cultural activities that attracts tourism growth and supports the local community's access to these facilities. Promote the integration of tourism infrastructure into activity centres to support and reinforce the economic function of activity centres.	The Strategy recommendations should aim to: • Promote the growth and investment in recreational, art and cultural activities. • Promote the integration of tourism infrastructure into activity centres.

Sustainable Economic Development		
Industry	Identify and allocate land within urban growth boundaries that is suitable for industrial use and development. Provide at least a 15-year supply of industrial land within existing growth boundaries. Protect existing and future industrial land from encroachment by incompatible use and development. Protect land surrounding industrial estates by designating it for a compatible land use that does not prejudice the future availability of the land for industry.	The Strategy should aim to protect existing industrial land within activity centres when appropriate and ensure surrounding land uses do not prejudice industry activities.
Business and Commercial	To promote business and commercial activities at a scale and intensity suited to the location to support diverse economic and employment opportunities. Identify and allocate a sufficient supply of land within existing settlements to provide for commercial and business use and development based on existing and projected demands. Identify an activity centre hierarchy that is based on the scale, role, function and accessibility of activity centres. Support the hierarchy by promoting complimentary use and development to strengthen efficiencies within activity centres and avoid unnecessary competition between centres. Encourage the intensification and growth in and around higher order activity centres. Support existing centres prior to considering the establishment of new unless it is a natural progression and highly accessible to its catchment of users. Support home-based business where and when reasonable. Provide for small scale commercial or business opportunities in residential and industrial areas that meets the needs of local residents or workers. Support mixed uses in activity centres that are highly accessible and where land use conflicts can be managed.	This policy is key to the development of the Activity Centre strategy. It directs planning to: • Allocate a sufficient supply of land within existing settlements for commercial and business use based on existing and projected demands. • Promote complimentary use and development and avoid unnecessary competition between centres. • Encourage the intensification of higher order activity centres. • Support mixed uses in highly accessible activity centres where land conflicts can be managed.

Sustainable Economic Development		
Innovation and Research	Support the provision and expansion of logistics and digital infrastructure. Support accessible and well-connected tertiary education and training institutions. Provide for precinct planning that allows for collaborations between industry, research and education. Promote existing and emerging innovation that promote Tasmania's assets by providing planning mechanisms that are adaptive and flexible to respond competitively to opportunities as they arise. Support opportunities for greater economic self-sufficiency, diversification and circular economies to help reduce the impacts of external forces on the State economy.	The Strategy should consider the relationship between existing activity centres and education facilities and the role of activity centres in the provision of logistics and digital infrastructure. The Strategy should allow opportunities for economic self-sufficiency and diversification. The Strategy should aim to provide planning mechanisms that are adaptive and flexible to respond competitively to opportunities as they arise.
Transport Modes	Support integrated land use and infrastructure and network planning that increases mode choice to access employment, essential services and community participation. Integrate land use with existing and planned passenger transport infrastructure and services. Locate developments that attract high numbers of people within existing activity centres. Encourage land use planning frameworks that can support and adapt to changing passenger transport needs. Recognise carparking as a key travel demand management measure and appropriately manage carparking provision to support a modal shift.	The Strategy should ensure recommendations consider: • The existing and planned transport links. • The need to accommodate development that attracts high numbers of people within existing activity centres. • Ensure parking policy supports a modal shift when appropriate.

Table 33: Sustainable Economic Development Policy Review Summary
Source: Mesh, 2024

PLANNING PROCESSES

Planning Processes		
Sub-Policy	Key Strategies	What This Means for the Brighton Activity Centre Strategy
7.1 Consultation	Facilitate the community's understanding of the planning system, land use planning issues and how they might be impacted to encourage meaningful community consultation in land use planning. Promote fair, inclusive, respectful and genuine consultation. Ensure consultation processes are informative and transparent.	The community consultation strategy to have regard to the strategies included under 7.1 of the TPPs.
7.2 Strategic Planning	Avoid allowing use and development where the implications of such proposal are not fully known or understood. Promote the identification and establishment of long-term land use planning priorities to allow inter-generational equity. Strengthen the use of scientific-based evidence to make informed land use planning decisions. Promote collaboration and coordination between Commonwealth, State and local government to deliver integrated, efficient and effective planning outcomes. Facilitate coordinated approaches between public and private investment to achieve common planning goals. Promote the review of land use strategies so that they remain current.	The Strategy to have regard to 7.2 of the TPPs.
7.3 Regulation	Allow use and development that has little or no impact to proceed without requiring planning approval. Reduce planning regulation to reflect the level of impact caused by the use and development. Support the maintenance of regulatory consistency. Encourage mechanisms that allow for timely adjustments in planning regulation for responses to and recovery from emergency events, pandemic and climate change.	The land use recommendations to have regard to 7.3 of the TPPs.

Table 34: Planning Processes Policy Review Summary
Source: Mesh, 2024

Draft Tasmanian Population Policy (July 2024)

Policy	Details
Liveability	Increased liveability through better infrastructure planning and delivery: Promote urban renewal and redevelopment. Embrace emerging and innovative technologies to support quality of life. Improve the alignment of supply and demand of infrastructure and services.
People & Skills	Identify social cohesion opportunities and challenges in local communities and support place-based approaches to deliver innovative solutions that engage young people, facilitate participation, and enhance feelings of belonging.
Sustainability	Research, share and expand the available population data, analysis to guide infrastructure, housing and services planning and decision making.

Table 35: Draft Tasmanian Population Policy Review Summary
Source: Mesh, 2024

Tasmanian Planning Scheme and Fact Sheet No. 5 (Business and Commercial Zones)

The Business, Commercial and Mixed Use Zone group contains a total of six zones that are intended to reflect Tasmania's activity centre hierarchy, as provided by the relevant land use strategy. Given the interface of Activity Centres with industrial land, the Industrial Zones are also described in this section. Specific Area Plans (SAPs) and Site-specific qualifications (SSQs) are also part of the planning toolkit for activity centre planning (Table 36).

Activity Zones	
Business Zones	**Description**
Village Zone	The Village Zone provides for small rural centres with an unstructured mix of residential, community services and commercial activities. The Zone's Use Table provides for a variety of Permitted uses reflective of this intent. The Zone provides for single dwellings as No Permit Required and provides for the protection of residential amenity from non-residential uses. The Village Zone is generally applied to the entirety of a small settlement of part of a rural settlement to reflect a genuine mix of uses.

Activity Zones	
Urban Mixed Use Zone	The Urban Mixed Use Zone provides for mix of uses where no particular use predominates, but with more of a business or commercial focus than the Village Zone. Unlike the Village Zone, the Urban Mixed Use Zone does not allow for Residential use No Permit Required, but rather allows it as Permitted where it occurs above ground level or to the rear of premises. This is to ensure an active street level (such as through shop frontages and pedestrian activity) is retained throughout the Zone. The purpose of the Zone provides specifically for ensuring the introduction Of new uses does not undermine the activity centre hierarchy.
Business Zones	The three business zones are very similar in their purpose but are applied to activity centres at different levels within the hierarchy. The purpose of the Local Business Zone is to provide for local retail and other services to meet the needs at the neighbourhood level.
Local Business Zone	The Local Business Zone represents the lowest order business zone in the activity centre hierarchy.
General Business Zone	The General Business Zone represents the middle order of the business zones, providing for the main suburban and rural town centres.
Central Business Zone	The Central Business Zone is applied to the capital city centre, large regional centres and some of the higher order suburban centres. The purpose in each of the Zones is to encourage business, retail, administrative, professional, community and entertainment functions consistent with the centre's role in the activity centre hierarchy. The Zones all encourage active street frontages and pedestrian activity. They allow for Residential or Visitor Accommodation uses where they encourage the viability of the Zone.
Commercial Zone	The Commercial Zone provides for retailing, service industries and warehousing that requires and large floor area needs. Examples of these uses include Bulky Goods Sales and Equipment and Machinery Hire and Sales. The uses provided for under the Zone usually require high levels of vehicle access and customer car parking. The Zone is often applied to specialist centres, such as the Devonport Homemaker Centre and Cambridge Park, that provide for large format retailing.
Industrial Zones	Description
Light Industrial Zone	The Light Industrial Zone aims to primarily provide for service-based industries which cater for the local and regional needs. Examples of such uses include manufacturing, processing, repair, storage and distribution of goods and materials. The impact of uses within the Zone are expected to be capable of being managed to the extent that they do not cause an unreasonable loss of amenity to other uses.
General Industrial Zone	The General Industrial Zone provides for the higher impact industries and largescale industrial operations such as Resource Processing, Manufacturing and Processing, Service Industries and Transport and Distribution uses. It is anticipated that the uses within the Zone are likely to generate impacts on other uses. Therefore, the Zone provides land that allows for higher impacting uses to operate without encroachment from incompatible uses that would give rise to land use conflict.
Tourism/Recreation	Description
Major Tourism Zone	The Major Tourism Zone is intended to integrate a range of use and development to provide for large scale tourist facilities. An example of the range of uses includes Visitor Accommodation, Hotel Industry, Tourist Operation and Sports and Recreation. Other complementary uses, such as Business and Professional Services and General Retail and Hire may also be approved within the Zone as Discretionary uses where they do not undermine the activity centre hierarchy.

Activity Zones	
Recreation Zone	The Community Purpose Zone provides for land accommodating key community facilities and services, including health, educational, government, cultural facilities. The Zone provides for uses that range in scale from a small community hall to a hospital. Community type residential uses are also allowed for in the Zone through the provision facilities such as respite centres, assisted housing and retirement villages as Permitted uses.
Open Space Zone	The Recreation Zone may be applied to public or private land and provides for formal recreation facilities. These can include sporting grounds such as an athletic centre, or hockey centre through to enclosed facilities such as a gymnasium or public swimming pools. In addition, provision is made within this Zone for Major Sporting Facilities acknowledging the impact these facilities can have on surrounding areas.
SAPs and SSQs	Description
Specific Area Plans (SAPs)	SAPs can provide for additional or different requirements for use and development for a specific area. One example is the Museum of Old and New Art (MONA) site at Berriedale, which under the Glenorchy LPS is Zoned Major Tourism and Environmental Management, with the MONA Specific Area Plan (MONA SAP) also applied to the land. The site accommodates a unique range of uses that managed through the MONA SAP including a vineyard, accommodation, the MONA museum, ferry terminal and ancillary restaurants and retail. SAPs are not able to override the administrative provisions outlined in clauses 3.0 to 6.0 of the SPPs. SAPs and the associated overlay map are contained in the LPS section of the TPS
Site-specific Qualification (SSQ)	Clause 5.4 explains that an SSQ can substitute, modify or operate in addition to a Use Table, or use or development standard in a Zone or Code for a particular site. An SSQ might allow for a specific business to operate out of a home in the General Residential Zone or for a specific General Retail and Hire business on a property in the Rural Zone as permitted uses. Similarly, an SSQ might provide specific subdivision or other development standards on a site that might not otherwise be allowed under the relevant zones or codes. SSQs are not able to override the administrative provisions outlined in clauses 3.0 to 6.0. SSQs are listed under the LPS section of the TPS.

Table 36: Activity Zones Policy Review Summary
Source: Mesh, 2024

East Derwent Highway – Bridgewater to Bowen Bridge Planning Study

The Department of State Growth is currently conducting a strategic assessment of the East Derwent Highway section extending from the Midland Highway intersection in Bridgwater to the eastern end of the Bowen Bridge. Key investigations will focus on identifying opportunities for road improvements to accommodate future growth in the region.

5.3 REGIONAL LEVEL POLICIES AND PLANS

Southern Tasmania Regional Land Use Strategy (2010-2035) (STRLUS)

Regional land use strategies set out key strategic directions for the Northern, Southern and Cradle Coast regions. Regional land use strategies guide amendments to each council's Local Planning Schedule as well as local strategic planning documents and structure plans. In short, these strategies should identify where growth and land use change should occur within the State.

The Southern Tasmania Regional Land Use Strategy (STRLUS) was originally issued in October 2011 and amended in 2013 and 2023. The STRLUS is currently undergoing a major review, it is likely that the Activity Centre Strategy is finalised prior to the completion of the updated STRLUS. Therefore, the findings from the Brighton Activity Centre Strategy will likely inform the revised STRLUS. Notwithstanding this, it is important to note that it is possible that the updated STRLUS makes changes to the activity centre hierarchy network and/or other relevant changes to the strategic directions which in turn result in some inconsistencies/misalignment between the strategies.

Brighton (M) is recognised as a Major Satellite of Greater Hobart along with Sorrel and Margate. Hobart and its Satellites, including Brighton (M), form part of the higher-order settlement for urban consolidation and population growth in Southern Tasmania. Residential growth is anticipated to be 50% infill and 50% greenfield development. Bridgewater North, Brighton South, Gagebrook-Herdsmans Cove, and Old Beach among others are recognised as greenfield development precincts. The SLRLUS identifies Brighton LGA to accommodate 15% of the residential growth for the region, which is estimated at the time to be 1,987 dwellings.

ACTIVITY CENTRE NETWORK

Activity centres are identified as the focus for services, employment, and social interaction. Emphasis is placed on their role in community, education, government services, recreation, and entertainment. The STRLUS also recognises activity centres as suitable for higher-density housing.

Other nodes of activity such as trade and construction retail, significant employment and community functions are not considered 'Activity Centres' and are seen more as specialised nodes of activity.

According to the STRLUS, the purpose of creating an activity centre network is to define a hierarchy to ensure complementarities and efficiencies rather than creating unnecessary competition between centres.

The Activity Centre Network is composed of:

- Hobart CBD and its immediate surrounds designated the Primary Activity Centre
- Principal Activity Centres aim to provide a wide range of services and facilities (including offices), with a strong focus on the retail and commercial sector. No Brighton (M) ACs are identified under this classification.
- **Bridgewater (Green Point)** is recognised as a **Major Activity Centre** with the role of serving the surrounding district and providing a range of convenience goods and services and some community facilities.
- **Brighton (S)** is recognised as a **Rural Services Centre** with the role of providing a range of goods and services and meeting the needs of a predominantly non-urban community, with trips to larger activity centres required occasionally.
- Minor/Neighbourhood ACs – role to serve the needs of the surrounding community and provide a focus for day-to-day life – to include a mix of retail, services and employment. Minor or Neighbourhood Activity Centres and Local Centres are described in the policy but not designated and are to be determined at the local level.
- Local Centres with the role of providing a focus for day-to-day life within an urban community and include at least one grocery/convenience store and a range of small speciality shops or small-scale eating establishments.
- Specialist Centre to be identified at a local level to provide for the activity of a specialist nature as defined through specific local area or structure plans – retail and (limited) office space should reflect the centre's purpose or defined character.

It's important to note that **Gagebrook-Herdsmans Cove, Pontville and Old Beach** do not have a specific classification under the STRLUS.

Activity centres with regional and sub-regional functions are recommended for inclusion in the Activity Centre Network. The STRLUS recommends that structure and management plans be prepared for these centres to strengthen their overall function and operation and to ensure that they are integrated with surrounding uses and the transport network (Table 37).

STRLUS		
Policy	Key Strategies	What This Means for the Brighton Activity Centre Strategy
SD3	Creating a network of vibrant and attractive activity centres.	
LUTI 1.3	Encourage residential development above ground floor level in the Primary, Principal and Major Activity Centres.	Allow for above-ground level residential uses in ACs.
LUTI 1.5	Locate major trip generating activities in close proximity to existing public transport routes and existing higher order activity centres.	Direct major trip generating activities to higher order centres serviced by public transport.
AC1	Focus employment, retail and commercial uses, community services and opportunities for social interaction in well-planned, vibrant and accessible regional activity centres that are provided with a high level of amenity and with good transport links with residential areas.	Consolidate activity-generating uses and opportunities for social interaction in AC particularly in those with good access to transport links and residential areas.
AC 1.2	Utilise the Central Business, General Business, Local Business Zones to deliver the activity centre network through planning scheme, providing for a range of land uses in each zone appropriate for to the role and function of that centre in the network.	Apply the CBZ, GBZ and LBZ to ACs as appropriate having regard to its role/function in the network.
AC 1.3	Discourage out-of-centre development by only providing for in-centre development within planning schemes.	Discourage out-of-centre development.
AC 1.4	Promote a greater emphasis on the role of activity centres, particularly neighbourhood and local activity centres, in revitalising and strengthening the local community.	Local activity centres have a key role in revitalising and strengthening the local community.
AC 1.5	Ensure high quality urban design and pedestrian amenity through the respective development standards.	The development outcomes are largely determined by the standard SPPs of the Business/Commercial Zones unless a SAP is introduced.
AC 1.6	Encourage an appropriate mix of uses in activity centres to create multi-functional activity in those centres.	A mix of uses and multi-functionality should be encouraged in each AC.
AC 1.7	Improve the integration of public transport with Activity Centre planning, particularly where it relates to higher order activity centres.	Consider the integration of centres with public transport.
AC 1.8	Ensure that new development and redevelopment in established urban areas reinforce the strengths and individual character of the urban area in which the development occurs.	As AC 1.5
AC 1.9	Require active street frontage layouts instead of parking lot dominant retailing with the exception of Specialists Activity Centres if the defined character or purpose requires.	Another reason to justify the removal of minimum car parking requirements.

STRLUS		
AC 1.10	Activity centres should encourage local employment, although in most cases this will consist of small scale business servicing the local or district areas.	ACs should encourage local employment.
AC 1.11	Provide for 10-15 years growth of existing activity centres through appropriate zoning within planning schemes.	AC planning is encouraged to consider a 10–15-year timeframe.
AC 2	Reinforce the role and function of Primary and Principal Activity Centres providing for needs of Southern Tasmania. Encourage structure and economic development planning for lower-level Activity Centres by local planning authorities.	As neither of the ACs studied are Primary or Principal, structure and economic planning is to be managed and implemented by Brighton Council.
AC3	Evolve Activity Centres focussing on people and their amenity and giving the highest priority to creation of pedestrian oriented environment.	Consider the removal of minimum car parking requirements within ACs to encourage active and public transport use.
AC 3.1	Actively encourage people to walk, cycle and use public transport to access Activity Centres.	
AC 3.5	Allow flexibility in providing on-site car parking in the lower order Activity Centres subject to consideration of surrounding residential amenity.	
LUTI 1.3	Encourage residential development above ground floor level in the Primary, Principal and Major Activity Centres.	As LUTI 1.3
LUTI 1.5	Locate major trip generating activities in close proximity to existing public transport routes and existing higher order activity centres.	As LUTI 1.5
LUTI 1.6	Ensure car parking requirements are consistent with achieving increased usage of public transport.	As AC 3.5.
LUTI 1.12	Include requirements in planning schemes for end-of-trip facilities in employment generating developments that support active transport modes.	Require the provision of end-of-trip facilities.
T 1.5	Provide flexibility within commercial and business zones for mixed use developments incorporating tourism related use and development.	Provide flexibility within AC for tourism related use and development.
T 1.6	Recognise planning schemes may not always be able to accommodate the proposed tourism use and development due to its innovative and responsive nature.	Consider the constrains planning controls may present to innovative tourism land use and development.

Table 37: STRLUS Policy Review Summary
Source: Mesh, 2024

5.4 METROPOLITAN – GREATER HOBART POLICIES AND PLANS

Draft Keep Hobart Moving Plan [13]

The draft Keep Hobart Moving plan is a short strategy to integrate transport system projects and plans within Greater Hobart for the next ten years. Its overarching goal is to create a safe, accessible, people-focused, and future-ready city that will enable economic prosperity and liveability. One of its goals is to increase public transport use for journeys to work from 6.4% to 10% by 2030.

The details available within this plan are limited to a list of projects classified in 'Planning' and 'Delivery'. This plan lists:

- Planned East Derwent Highway Improvements (Bridgewater to Grasstree Hill).
- An ongoing review of bus routes and timetables.
- A planned Rapid Bus Network (RBN) from Hobart to Claremont, Hobart to Howrah and Hobart to Blackmans Bay. Notably, the proposed RBN ends in Claremont and does not reach Brighton's LGA.
- Investigations areas for expansions to the existing ferry services. It includes a section between Glenorchy and Claremont but excludes Bridgewater.

5.5 LOCAL POLICIES AND PLANS

Brighton Council Structure Plan 2018 [14]

This Structure Plan assesses issues and opportunities associated with retail, commercial and industrial land in Brighton (M) (Table 38).

Key Findings	What This Means for the Brighton Activity Centre Strategy
In light of Tasmanian's economic and population growth, it is important to maintain a supply of industrial land particularly the Brighton Industrial area & Transport Hub	Ensure AC planning does not significantly intrude on Industrial land, particularly, when it could limit potential future consolidation of industrial land.

[13] Department of State Growth.

[14] Prepared by Echelon Planning and Essential Economics.

Key Findings	What This Means for the Brighton Activity Centre Strategy
The vacancy rate within Brighton is low at 4.5% of total retail floorspace. There is however a high-vacancy rate of concern within the northern end of Bridgewater Bridge (42%).	Low vacancy rates suggest support for expansion of planning controls encouraging retail floorspace (except for Bridgewater).
Limited commercial services offerings estimated at 2,500m^2.	Estimated existing commercial floorspace and land needs gaps and identify appropriate locations for future commercial services.
The forecast population growth is supporting a range of convenience-related retailing but unlikely to support a retail scale such as Rosny Park or Glenorchy's centres.	Evaluate this through retail land use needs assessment, implicitly testing whether there continues to be a lack of a critical mass of population to support major retail development in Brighton (M).
Forecast demand for at least 7,220m^2 of retail floorspace and 1,130m^2 of additional commercial office space (2018-2033) the majority to be distributed in Bridgewater and Brighton (S).	Compare retail and office floorspace demand with the estimations made in 2018, in particular: • Retail floorspace demand: 7,220 m^2 • Commercial office floorspace demand: 1,130m^2
The western region of Brighton (M) has modest population growth, lower incomes and very high unemployment rates.	Consider vulnerable population within western region of Brighton (M) through improved offerings of its closest activity centres.
A significant group of employed residents travel toward Glenorchy and Hobart for work and it's likely that retail spending is 'escaping' to these locations.	Compare changes in retail spending leakage.
Opportunities to improve performance of Bridgewater via appearance, perception and integration of retail areas.	Consider whether the poor presentation of centres continuous to be a problem.

Table 38: Brighton Council Structure Plan 2018 Policy Review Summary
Source: Mesh, 2024

Brighton Council Vision 2050 (2021)

The following 2050 vision statements are relevant for activity centre planning:

- Our place is thriving: A destination for business, learning and creation
- Our community is proud: We embrace who we are now while celebrating our ancient past
- Our opportunities are for all: From the young to the elderly
- Our environment is cherished: We act sustainably and are mindful of climate change.

Brighton's (M) economic development objectives include:

- Attracting economic development and job opportunities
- Diversification of trades and businesses, including green and emerging technologies
- Affordable commercial spaces available for businesses
- Incentives for industry and businesses to move to or stay in Brighton
- Move a State Government department to Brighton (M)
- Offer a diverse mix of local places to shop, eat and socialise; a vibrant shopping street
- More takeaways/cafes with healthy options; good fruit and veg shop and deli; Local restaurants
- Encouraging arts, culture and the creative industries
- Better access to local health care and wellbeing: edible gardens, communal olive oil and fruit orchard
- Embracing best-practice environmentally sustainable initiatives
- Better connectivity with between walking tracks and nature assets.

The vision seeks to enable major projects and connections, mainly:

- The completion of new Bridgewater Bridge
- A new local High School
- A vibrant industrial area
- A light rail connection
- The Derwent River Ferry Service.

Brighton Structure Plan [15] (2018)

The Brighton Structure Plan identifies several important constraints and opportunities for Brighton's (M) ACs, including:

- Encouraging local businesses, educators and trainers to collaborate
- Improving tourism offering
- Improving the Cove Hill Centre, Brighton High Street, Pontville

[15] Prepared by Echelon Planning

- Improving movement networks and bus services and connections across the East Derwent Highway, planning for future ferry services and light rail

The implementation plan makes a number of key recommendations, the following are considered relevant to activity centre planning:

- Ensure the planning scheme allows for medium-density housing to be established in close proximity to town centres, public transport services and open space
- Ensure attenuation buffers around the Brighton Transport Hub and Industrial Estate area are maintained
- Advocate for improved bus services, upgrades to bus stops and shelters and locations for park and ride facilities for bus services
- Investigate options for markets, festivals and pop-up art exhibitions

This structure plan recognises the following community infrastructure needs:

- Identification and establishment of an emergency services precinct. Three options are discussed:
    - Old Main Road
    - Cove Hill Road central
    - West of Cove Hill Road
- A new secondary school with potential locations identified in Brighton and Pontville
- MONA's hacking school in Bridgewater
- Upgrades to the Pontville Park to a regional facility

Detailed policy direction and opportunities identified specific to a centre are contained within Section 2.3 Activity Centre Profiles.

5.6 MODELLING METHODS

Key Terms

The following key terms are used to describe consumer expenditure data and land typology:

- **Total Local Spend**: The combined total of resident and visitor (non-resident) spending within Brighton (M) or specified suburbs
- **Resident Escape Spend**: Spending by Brighton (M) residents or those from specified suburbs made outside the LGA
- **Resident Local Spend**: Spending by residents within the LGA
- **Resident Online Spend**: Spending made online by residents
- **Visitor (Non-Resident) Local Spend**: Spending by non-residents within Brighton (M) or specified suburbs
- **Total Resident Wallet**: The sum of all resident spending. That is, Resident Local Spend, Resident Online Spend, and Resident Escape Spend.
- **Commercial land:** This refers to land used to accommodate office spaces, e.g., for professional services.
- **Retail land:** This refers to land used to accommodate retail activities, including for grocery stores, liquor outlets, clothing and personal services such as hairdressers.

Table 39 shows the alignment between the Spendmapp (MCC) expenditure categories and the ABS retail categories [16].

[16] For details on the latter, please refer to the ABS website: abs.gov.au/methodologies/retail-trade-australia-methodology/jul-2024#defining-retail-trade.

Spendmapp Category	ABS Retail Category
Grocery Stores, Food & Alcohol Retailing	Food, Liquor and Groceries
Dining, Entertainment & Travel (exc. Entertainment & Travel)	Food Catering
Department Stores & Retail	Apparel, Homeware and Leisure
Bulky & Household Goods	Bulky Goods
Services & Other	Retail Services

Table 39: Spendmapp and ABS Retail Categories Alignment
Source: Geografia, 2024, ABS, 2024

Population Forecasts

Brighton's population growth has consistently surpassed historical population forecasts. To address this and ensure the assessment does not underestimate future population needs, this Study adjusts by supplementing the most recent population forecasts with the effects of growth area opportunities. The Council has identified five key areas for consideration. These are:

1. The Bridgewater Bridge Waterfront Masterplan. The growth area potential also includes land zoned Rural Living west of the main project area, and combined with this, it is expected to be able to accommodate 423 dwellings when fully developed.

2. South Brighton Market is expected to accommodate approximately 565 new residential lots and 1,800 sqm of land zoned for business.

3. Boyer Road – Future Urban Zone, west of the Old Main Road precinct in Bridgewater. This is expected to accommodate approximately 350 new residential lots.

4. Precinct A – Old Beach Zoning Review on the eastern side of the East Derwent Highway in Old Beach. This is expected to accommodate approximately 500 new residential lots.

5. Development at 203-205 Old Beach Road, Old Beach, is expected to accommodate around 80 new residential lots.

Table 40 summarises the population estimate of these five growth areas and the assumed commencement year of the development. The information has been prepared in consultation with the Council.

Growth Area Opportunities	Assumed Commencement Year	Development Timeline (Years)	Est. Dwellings (no.)	Assumed Household Size	Population Estimate
South Brighton Market, Brighton (S)	2026	11	565	3.00	1,695
Bridgewater Bridge Waterfront Masterplan†	2025	8	423	2.28	964
Boyer Road – Future Urban Zone	2026	16	350	3.10	1,085
Precinct A – Old Beach Zoning Review	2030	10	500	3.10	1,550
Development at 203-205 Old Beach Road, Old Beach	2025	2	80	3.10	248
Total			1,918		5,542

Table 40: Total Population Estimates by Growth Area Opportunities
Source: Geografia, 2023, compiling information provided by Council. Assumed household sizes are derived from previous assumptions used in growth area studies undertaken by SGS and Choice Location.
† Including RLZ area west of the Masterplan area.

In total, these five growth areas are estimated to accommodate 5,542 new residents in 1,918 dwellings. When combined with the baseline population forecasts, the population increases from 20,364 residents in 2024 to 30,920 residents in 2046 (Figure 26).

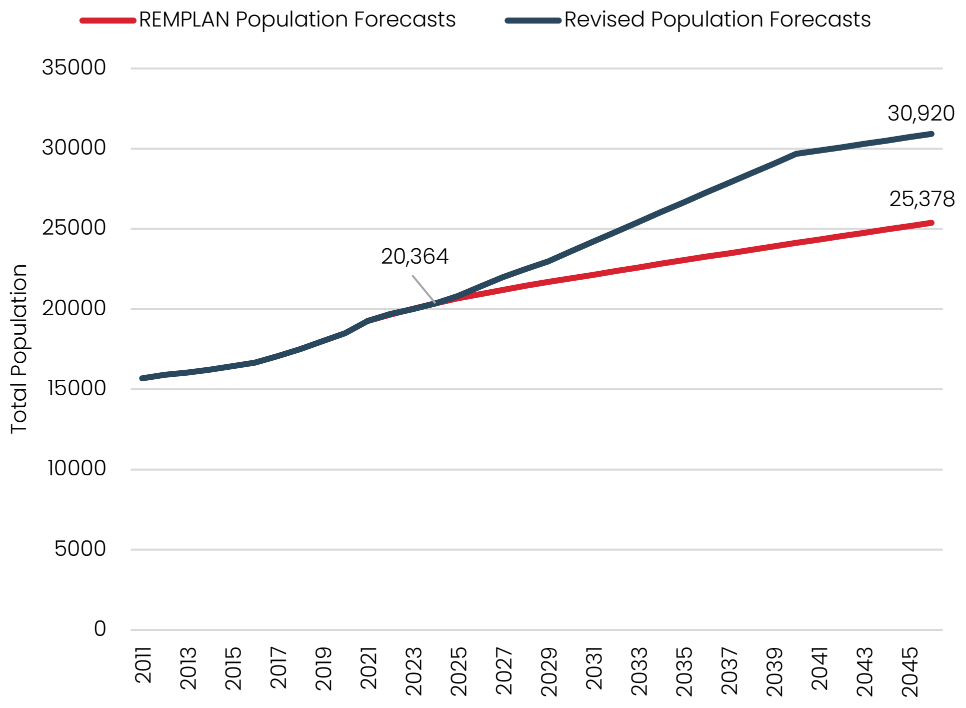


Figure 26: Population Forecasts for Growth Areas Combined
Source: Geografia, 2024 and REMPLAN, 2023

Retail Catchments of Brighton's Activity Centres

Before estimating current and future demand, catchment areas need to be assessed and determined. This is critical as these form the basis of the demand growth analysis. While the STRLUS identified regional catchments for Bridgewater and Brighton (which were adopted), these catchments were mapped more than 10 years ago and require validation.

Bank transaction data (via Spendmapp) was used to evaluate the catchments and explain any inconsistency between the results of this analysis and previous studies. Figure 8 and Figure 9 depict the 80% retail activity [17] catchment areas for Bridgewater and Brighton suburbs. That is the geographical area from which at least 80% of the retail expenditure in these centres is drawn. An 80% limit is used to exclude the typical 20% who may be occasional visitors (including the 20% would likely create a catchment area encompassing the whole of Australia).

[17] Spendmapp data includes information on cardholder address, the location of the merchant in which the transaction occurs, the time and volume of expenditure and the type of goods and services being purchased. To protect privacy, data is aggregated to suburb level and category of expenditure.

The spend and mobility data derived catchments aligns well with those established by STRLUS. That is;

- Bridgewater has a catchment that encompasses the whole of Brighton (M), parts of northern Glenorchy, Southern Midlands and other adjoining rural municipalities

- Brighton (S) has a catchment that encompasses the whole of Brighton (M), Southern Midlands and other adjoining rural municipalities.

In addition to this, the Spendmapp data shows that the remaining neighbourhood and local activity centres have more restricted catchments. Consequently, this analysis assumes the remaining centres have a local catchment area encompassing their respective suburbs. This applies to Gagebrook-Herdsmans Cove and Old Beach (Table 41).

Brighton Activity Centre	Primary Catchment Area	Secondary Catchment Area
Bridgewater	Brighton (M)	Southern Midlands, southern Central Highlands and northern parts of Glenorchy (Granton, Austins Ferry, Claremont) as per Figure 8 and previously established catchments in STRLUS
Brighton (S)	Brighton (M), Pontville	Southern Midlands and southern Central Highlands as per Figure 9 and previously established catchments in STRLUS
Old Beach	Old Beach	-
Gagebrook-Herdsmans Cove	Gagebrook, Herdsmans Cove	-
Pontville	Pontville	-
Total		

Table 41: Brighton (M) ACs Retail Catchment Areas
Source: Geografia, 2024 using Spendmapp, 2024

Recognising Resident Escape Spend to Higher-Order Activity Centres and Online Retail

Spendmapp reveals Resident Escape Spend and Resident Online Spend patterns. Table 42 lists the distribution of escape spend by retail category for all Brighton (M) residents in FY23. The modelling fixes these proportions for two reasons:

1. It accounts for future land use needs in a manner that respects existing hierarchies and supports the vibrancy of these higher-order activity centres
2. It recognises more recent and permanent shifts in existing spending patterns towards the online retail economy.

AC Hierarchy	Food, Liquor and Groceries	Food Catering	Apparel, Homeware and Leisure	Bulky Goods	Retail Services
Higher-Order Centres	15%	17%	31%	27%	17%
Online	5%	22%	37%	3%	49%

Table 42: Share of Brighton (M) Resident Escape Spend by Category
Source: Geografia, 2024 using Spendmapp, 2024

Recognising Increased Retention from Forthcoming Provisions

Three imminent initiatives and strategic policies suggest the potential to increase the level of retail provision:

1. Brighton Shopping Centre is expected to increase local spending patterns for both Brighton and adjoining Pontville. In this regard, the spend capture rate for Brighton and Pontville is assumed to increase to 50% of the Total Resident Wallet. At the same time, the spending share from these suburbs to Bridgewater will decline to 30%.
2. Old Beach as a potential neighbour centre, supporting increased level of local retail provision. Using existing spending patterns would not reflect potential retail. To assess, we assume 50% of total resident spending locally, with an additional 30% deferring to Bridgewater as the MAC.
3. Retain existing shares of spending for remaining suburbs as fixed (i.e. deferring to Bridgewater and Brighton), given the primacy of the RSC and MAC in the local hierarchy.

Forecasting Total Retail Spending

Forecast total retail spending has been modelled by:

- (After removing Resident Escape Spend) Quantifying per capita spending by category and suburb of residence.
- (Using per capita spending patterns) Applying percentage growth rates using revised population growth rates.
- Applying real changes in retail spending patterns by category, using historical 10-year percentage changes by ABS Retail category.

Figure 27 illustrates the existing and future retail spending patterns for Brighton (M) Activity Centres. It shows increasing levels of spending in Bridgewater, Brighton (S), and Old Beach. At the same time, the model shows relatively low levels of retail growth in Gagebrook-Herdsmans Cove and Pontville. This reflects the relatively unchanging population sizes as these areas approach housing development capacity.

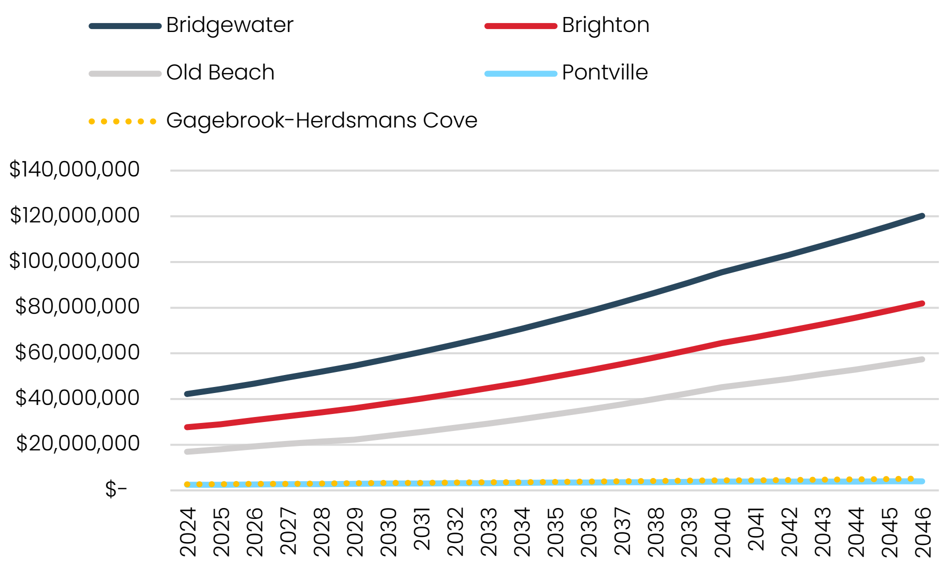


Figure 27: Forecast Total Retail Spending by Activity Centre, FY23
Source: Geografia, 2024 using Spendmapp, 2024

Forecast Total Land Use Demand

To derive retail floorspace demand, turnover-to-floorspace ratios are applied to the forecast total retail spending. Table 43 shows the assumed ratios by retail category and Brighton Activity Centre suburbs.

These ratios are taken from Spendmapp and are based on actual total retail spending patterns. It is important to note that spending patterns in Brighton are lower than seen elsewhere in Australia, as well as in the rest of Hobart. This reflects the lower household spending capacities in these suburbs and the limited retail offering.

Retail Category	Bridgewater	Brighton	Old Beach	Others
Floor Liquor and Groceries	$8,000	$8,000	$8,000	$6,000
Food Catering	$4,500	$4,500	$4,500	$4,500
Apparel, Homeware and Leisure	$5,500	$5,500	$5,500	$5,500
Bulky Goods	$3,000	$3,000	$3,000	$3,000
Retail Services	$3,000	$3,000	$3,000	$3,000

Table 43: Spend Turnover Per Sqm Floorspace
Source: Geografia, 2024

In addition to the turnover-to-floorspace ratios, floorspace-to-land ratios are used to estimate land demand. These are then assessed against the current floorspace and land supply for retail-relevant land in Brighton's activity centres.

Employment Forecasts

In Section 3.3, employment growth was discussed and showed relatively modest increases in Brighton (M). The growth is dominated by light industries (transport, postal and warehousing) and population servicing industries. This Study assumes that historical growth rates remain fixed and in line with population and employment growth patterns over the last ten years.

Table 44 provides an output of the total employment forecasts by ANZSIC Industry Division.

Industry of Employment	2026	2031	2036	2041	2046
Agriculture, Forestry and Fishing	108	134	159	182	201
Mining	32	46	60	73	86
Manufacturing	216	232	244	255	263
Electricity, Gas, Water and Waste Services	24	30	36	41	45
Construction	428	512	589	656	714
Wholesale Trade	152	189	223	254	282
Retail Trade	446	567	683	790	884
Accommodation and Food Services	189	216	240	260	277
Transport, Postal and Warehousing	692	852	1,003	1,137	1,254
Information Media and Telecommunications	16	23	31	39	47
Financial and Insurance Services	0	0	0	0	0
Rental, Hiring and Real Estate Services	22	36	53	72	91
Professional, Scientific and Technical Services	56	69	81	91	100
Administrative and Support Services	115	124	132	139	144
Public Administration and Safety	121	123	125	126	127
Education and Training	384	413	437	457	473
Health Care and Social Assistance	364	438	506	566	617
Arts and Recreation Services	104	131	156	178	198
Other Services	193	235	274	309	340
Total	3,662	4,371	5,032	5,626	6,143

Table 44: Forecast Total Jobs by Industry Sector, Brighton (M)
Source: Geografia, 2024

ABS Census data indicates that some share of employment in Brighton (M) is carried out at home. Given the increased prevalence of working from home, the 2021 Census home-employment patterns are fixed. 'Office-based employment levels are then derived by applying the share of office-based to total non-home based jobs by industry sector in Brighton. This is depicted in Table 45.

Industry of Employment	Share of Office-based Jobs from Total Non-Home based Jobs
Agriculture, Forestry and Fishing	0%
Mining	0%
Manufacturing	0%
Electricity, Gas, Water and Waste Services	0%
Construction	0%
Wholesale Trade	0%
Retail Trade	0%
Accommodation and Food Services	0%
Transport, Postal and Warehousing	0%
Information Media and Telecommunications	0%
Financial and Insurance Services	90%
Rental, Hiring and Real Estate Services	80%
Professional, Scientific and Technical Services	85%
Administrative and Support Services	65%
Public Administration and Safety	75%
Education and Training	5%
Health Care and Social Assistance	5%
Arts and Recreation Services	5%
Other Services	20%

Table 45: Share of Total Office-Based Jobs by Industry Category
Source: Geografia, 2024

The ABS Census also facilitates the separation of private and public sector jobs. The 2021 Census ratio is assumed to be fixed.

Forecast Total Land Use Demand

To derive commercial floorspace demand, the turnover-to-floorspace ratio is applied to the forecasted total office-based jobs in Brighton (M). Table 46 shows the jobs-to-floorspace ratios at the municipal level.

Land Use Formats	Jobs-to-Floorspace Ratios (sqm)
Commercial and/or Office	25

Table 46: Jobs-to-Floorspace Ratios and Floorspace-to-Land Ratios
Source: Geografia, 2024

To derive retail land demand, floorspace-to-land ratios are applied to future floor space demand (Table 47). These are then assessed against the current floorspace and land supply for relevant land in Brighton's (M) activity centres.

Land Use Formats	Low	Medium	High
Retail	1.00	0.60	0.40
Commercial and/or Office	1.00	0.60	0.40
Bulky Goods	0.50	0.30	0.20

Table 47: Floorspace-to-Land Ratios by Scenario
Source: Geografia, 2024