Clarence City Council| Retail Analysis

Prepared for Clarence City Council

MacroPlan Australia Pty Ltd |
e3 planning Pty Ltd
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MACROPLAN AUSTRALIA PTY LTD
SYDNEY l MELBOURNE l PERTH l BRISBANE

Project Contact - Economics
Justin Malkiewicz
Senior Economist
MacroPlan Australia

Project Contract - Planning
Evan Boardman
Director
e3 Planning

CONTACT
MacroPlan Australia Pty Ltd
Level 4, 356 Collins Street,
Melbourne, Vic. 3000
t 03 9600 0500
f 03 9600 1477

e3 Planning pty ltd
Suite 5, 81 Salamanca Place
Battery Point
Hobart
m 0438 376 840

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Executive Summary

1. Introduction and background

MacroPlan and E3 Planning have been engaged by the City of Clarence to provide advice on a preferred activity centre framework for development as part of the preparation of a Planning Scheme.

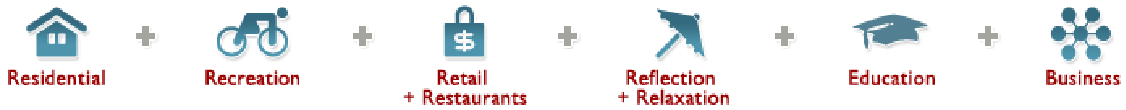
It also recognises that the current framework within Clarence does not have a defined hierarchy to guide development.

2. Existing Activity Centre Hierarchy

The existing hierarchy in Clarence is defined by the network of retail centres, with limited commercial activity outside the Hobart CBD.

In order to assess the existing and future floorspace requirements within Clarence, the authors have developed and identified a new Activity Centre Hierarchy framework that targets a mixed use approach of retail, commercial, community and other uses.

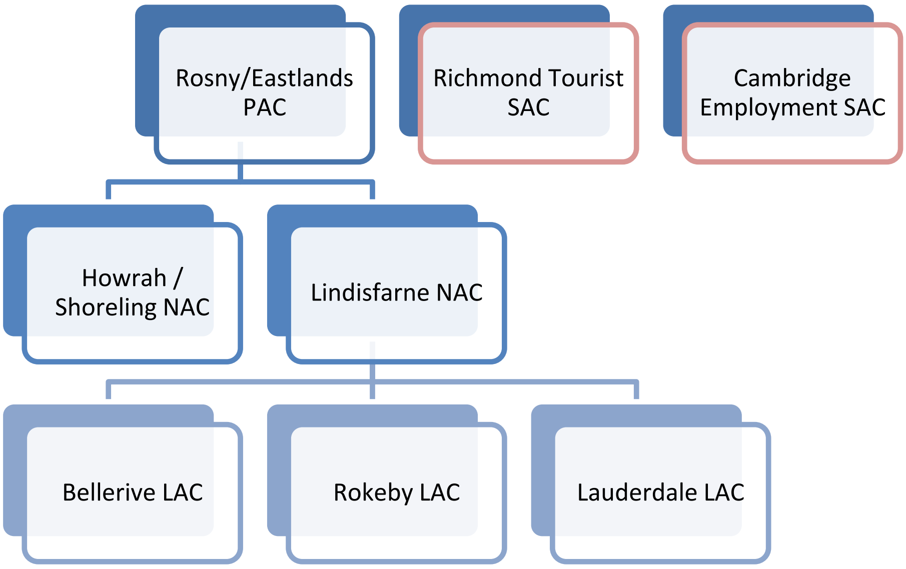
Achieving the required critical mass and balance of key mixed use components is paramount and can maximise economic and community benefits, including a range of uses such as:



The existing activity centre hierarchy can be divided into five activity centre levels, including:

- Primary Activity Centre (Hobart Central Business District)
- Proposed Activity Centre Hierarchy For Clarence
- PAC -Principal Activity Centres (i.e. Rosny)
- NAC Neighbourhood Activity Centres (i.e. Shoreline/Howrah, Lindisfarne)
- LAC Local Activity Centres (i.e. Bellerive, Rokeby, Lauderdale)
- SAC Specialised Activity Centres (i.e. Cambridge Airport, Richmond)

Figure 1. **Existing Activity Centre Hierarchy**



Activity centres meet the needs of a market in different ways, depending on the characteristics of the catchment, and how established the catchment may be. Locational factors including co-location to other uses (i.e. employment, community uses and transport) also play a part in defining the role of a centre.

3. Roles and function in the Clarence hierarchy

An orderly activity centre hierarchy for the Clarence is reinforced given the significant geographic area and established network of retail centres. An orderly hierarchy will benefit residents, Government and developers and provide an efficient balance between each centre and allow for a mix of uses including:

- Provision of non-core retail activities, including entertainment, service, community and civic.
- Opportunities for commercial activities, including office space.
- Education and health facilities.
- Entertainment activities.
- Opportunities for higher residential densities.

An adequate provision of retail floorspace will allow residents to undertake more of their shopping within close proximity to their place of residence, leading to less travel requirements, more multi-purpose trips and greater community interaction.

Not only is retail floorspace important for resident shoppers, it is also an important factor within the employment market, being an important employing sector in Clarence.

4. Clarence Activity Centres

All Activity Centres within Clarence will have the opportunity to enhance their offer, innovate and remain competitive due to moderate growth in population, continued income growth and socio-economic changes.

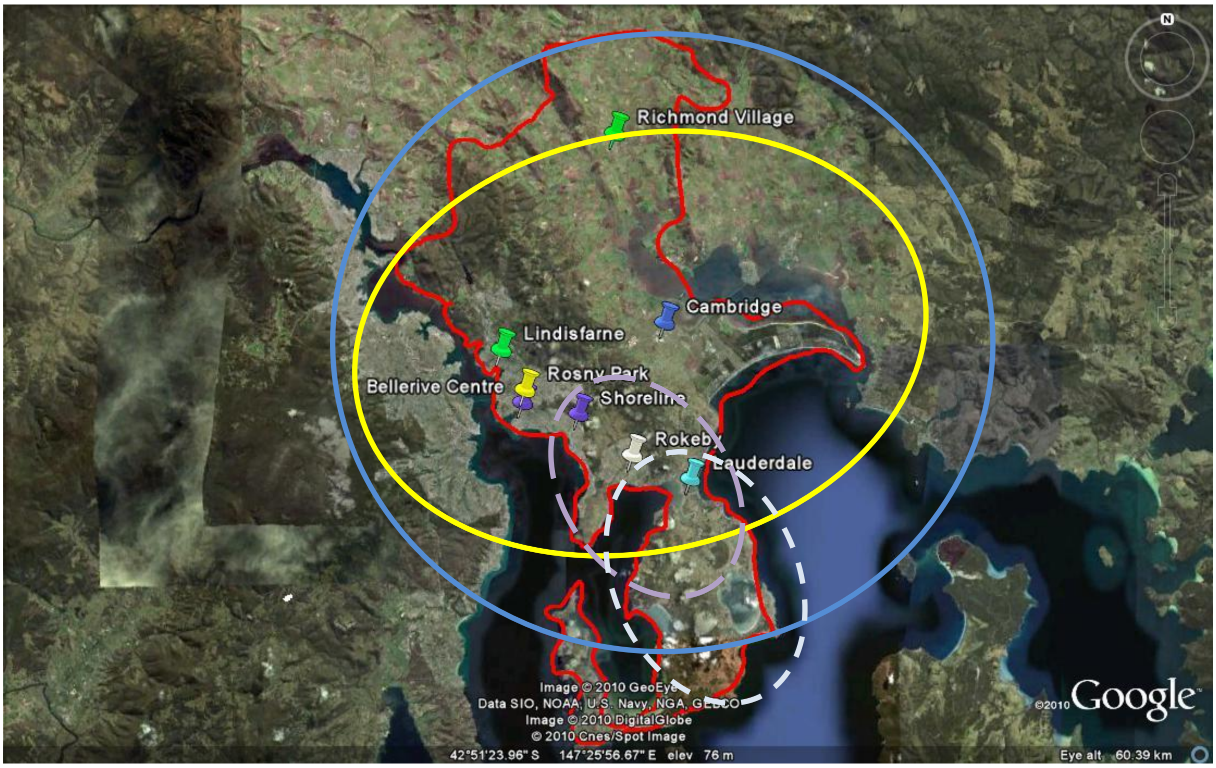
The strength of non-food retailing in Clarence is evident by Rosny and Cambridge, which attract residents from surrounding areas, including the western shore. These centres provide retail floorspace and are now challenged with providing stronger and more vibrant community hubs, with potential to increase non-retail uses such as entertainment offer and higher density residential.

As part of the assessment of retail floorspace requirement for the Clarence Activity Centres the authors have:

- Defined a study area showing the areas from which the Activity Centres within Clarence draw the majority of their trade.
- Assessed the competitiveness of each of the centres.
- Calculated total requirement for retail floorspace within the study area based on the population growth and likely requirements.
- Assessed retail floorspace growth that could be provided within the Activity Centres based on a number of principles of allocation.

The defined study area and associated trade areas for individual centres is detailed in the following figure.

Figure 2. **Clarence Centres Study Area**



Clarence City Municipal Boundary
Rosny Park Trade Area
Cambridge Trade Area
Shoreline Trade Area
Lauderdale/Rokeby Trade Area (potential)

Between 2010 and 2031, the Clarence study area population is expected to grow by nearly 20,000 people at an average annual growth rate of 1.0% across the study area. Based on Clarence's population growth, MacroPlan has estimated that an additional 44,000sqm of retail floorspace will be required to be developed in centres within Clarence between 2010 and 2031 as detailed in the following table.

Table 1. Expected Clarence retail floorspace requirement, 2010-2031

Study Area	2010	2011	2016	2021	2026	2031	Growth 2010-21	Growth 2010-31
Population	85,301	86,335	91,445	96,363	100,881	105,195	11,062	19,894
Food retailing								
Supermarkets	29,855	30,217	32,006	33,727	35,308	36,818	3,872	6,963
Food retail specialties	12,795	12,950	13,717	14,454	15,132	15,779	1,659	2,984
Food catering	21,325	21,584	22,861	24,091	25,220	26,299	2,766	4,974
Total food retailing	63,976	64,751	68,584	72,272	75,661	78,896	8,297	14,921
Non-Food retailing								
Dept. stores / DDS	25,590	25,900	27,434	28,909	30,264	31,559	3,319	5,968
Non-food specialties	29,855	30,217	32,006	33,727	35,308	36,818	3,872	6,963
Bulky goods	55,446	56,118	59,439	62,636	65,572	68,377	7,190	12,931
Total non-food	110,891	112,235	118,879	125,272	131,145	136,754	14,381	25,862
Retail services								
Retail services	12,795	12,950	13,717	14,454	15,132	15,779	1,659	2,984
Total retail floorspace	187,662	189,937	201,179	211,999	221,937	231,429	24,337	43,767

Future retailing should be directed towards the generation of activity that will lead to associated mix of uses within activity centres to take advantage of the wide catchment that retailing anchor stores will draw from (i.e. commercial floorspace and diverse housing)

The existing activity centres will meet a portion of this demand as they enhance their existing offer and provide a stronger community offer, but a new neighbourhood centre will also be required within Southern Clarence to cater for retail needs of residents (this is discussed in greater detail in section 5.10 of this report). This retail floorspace requirement can be directed in two primary forms:

- Expansion and development at existing retail and activity centres.
- Development of new Activity Centres.

Importantly, the identification of a new neighbourhood activity centre should focus on the provision of facilities that provide a wider net community benefit (i.e. increases integration, public transport accessible, proximity to residential, entertainment, community facilities and services).

Bulky goods retailing is a major contributor to the economy in Clarence, with Cambridge Park Precinct serving metropolitan Hobart for their bulky goods needs. This sector is currently well served in Clarence, and is unlikely to require additions to floorspace within a discrete environment. Within the Clarence market, sustainable and commercially realistic outcomes for bulky goods retailing are best achieved by continuing to encourage existing activity centres to compete more strongly with this precinct.

5. Principles of allocation

An appropriate allocation of the need for additional retail floorspace and an allowance for centres to remain competitive is recommended subject to defined policy objectives and a suggested new retail hierarchy. Key principles to consider for supporting activity centres that provide an attractive and safe environment are:

- Retail floorspace is a key anchor for activity centres. The right mix of retail floorspace and other uses at centres will encourage the take up of high density residential housing and commercial floorspace in activity centres. The mix of uses and floor area will provide more activity and hence deliver a sustainable centre.

- Floorspace should be allocated to centres with the greatest opportunity for mixed use activity and in close proximity to residential growth and transport links.

- The increased requirement for retail floorspace (primarily non-food floorspace) should be utilised to leverage or bolster demand for alternative commercial uses within residential growth areas.

- Higher density housing needs to be encouraged and delivered in activity centre locations to reduce perceptions of crime and to activate street frontages.

- Employment intensification via increases in retail or commercial floorspace should be encouraged in activity centres when possible. More generally, employment diversification and location balance (i.e. in closer proximity to residential land) is required across the study area to reduce vehicle reliance achieve higher levels of employment self sufficiency for the existing and future resident labour force.

- It is recognised that significant volumes of office related employment will continue to be accommodated on industrial zoned land given Clarence's industry and land pricing structure.

6. Guiding Policy Recommendations

A number of key planning considerations have emerged as part of this review. These recommendations are not listed in any order of priority.

- Amend the planning scheme to refer to Activity Centres as opposed to retail hierarchy;

- Recognise the Activity Centre Hierarchy identified within this study within the planning scheme.

- Develop Desired Future Character Statements for each of the key Activity Centres and insert these into the Planning Policy Framework at section 2.2 of the scheme.

- Include a reference within the Specific Decision Requirements of the relevant zone to these desired Future Character Statements (with emphasis on the Commercial zone).

- Amend the Urban Growth Boundary from page 11 of the planning scheme, to provide for the expansion of the Commercial Zone in Southern Clarence. The Growth Boundary should also be digitised to detail the areas and properties covered by the boundary.

- Amend the planning scheme to provide for increased residential density in or around the Principal Activity Centre of Rosny Park, this density should be provided for within approximately 500metres of the Rosny Park Commercial Zone, the exact location of this increase in density should be shown as an overlay within the planning scheme.

- Rezone the undeveloped area of commercially zoned land at Rokeby adjacent to Burtonia Street from Commercial to Residential, this land has been zoned as such for many decades and no commercial interest has been expressed in its development.

- Council to undertake a Structure Plan for Lauderdale to determine the most appropriate location for a future commercial zone in the area covered by the Structure Plan.

- Develop a Retail Policy which encourages the development of a Neighbourhood Activity Centre within Southern Clarence. Such a policy to include the following specifications for any centre:

    - Land area in excess of 2ha, the area must be of a sufficient size to provide for an anchor tenant, carparking, ingress and egress routes and associated specialist shops such as newsagent, hairdresser etc.

    - Located adjacent to a major transport route

    - Has necessary services and infrastructure connected and or available

- Rezone or introduce a specific overlay to recognise the individuality of the Cambridge Park Precinct.

1 Introduction

This report has been prepared for the City of Clarence by MacroPlan Australia and e3 Planning. The report considers retail and commercial strategies and provides forecasts of retail floorspace requirements for Clarence City over the period 2010 to 2031. The findings are intended to assist Council in assessing development applications, preparing and determining the appropriateness of planning scheme amendments and the extent of issues relating to ways Council can plan for activity Centres and retail floorspace provision.

1.1 Activity Centres

Activity Centres are social gathering places, entertainment centres, administrative hubs and retailing meccas. They generate income and employment and provide for the needs and wants of a society. In many instances and for many people they are the most important places in a city.

Activity centres meet the needs of society in different ways, depending on the characteristics of the catchment[1], and how established the catchment may be. Location factors including co-location to other uses (i.e. employment, community uses and transport) also play a part in defining the role of an activity centre.

Well functioning and popular activity centres play an important role in the desirability of a suburb. Dwellings located within a walkable distance of these centres can command a significant premium over those that are not co-located to centres.

Achieving the required critical mass and balance of key mixed use components is paramount and can maximise economic and community benefits.

Figure 3. **Critical Mixed Use Components**

Source: MacroPlan

Investment in these components is essential for the health, social wellbeing and economic prosperity of communities.

As a centre increases in size, delivering additional economic and financial floor space a commensurate increase in community facilities and employment outcomes can be achieved.

[1] The term catchment refers size of the surrounding area and its population who are likely to frequent an activity centre.

1.2 Objectives

The authors have been engaged by the Clarence City Council to identify likely and future demand for retail floorspace in Clarence.

The processes set out in this report will establish clear direction to guide the development of relevant sections of any future Clarence City Council Planning Scheme supported by policy principles that will assist Council allocate resources development according to retail formats and locations.

The authors understand that Clarence is experiencing population growth and it has become clear that some assumptions underpinning the planning scheme require review.

The key aims of this project are to:

- provide estimates of retail floorspace supportable in Clarence by quantum, type and distribution, with a focus on retail floorspace in centres serving a neighbourhood and higher order catchment;
- identify factors that underpin demand for retail floorspace;
- analyse the gaps in the current supply of retail developments;
- create a vision for their future development;
- provide an assessment of current planning provisions and key recommendations for their improvement and importantly;
- Develop a hierarchy and network of activity centres that support the major regional city in response current trends in the region.

1.3 Approach and report structure

The authors have taken a mix of development considerations and an assessment of relevant data sets and key policy principles in a Regional, State and National context to formulate an appropriate strategy for Council.

This chapter describes the broad methodology adopted in preparing forecasts of supportable retail floorspace in Clarence. The detailed retail modelling is presented in Chapter 3.

Broad Approach

The broad approach firstly assesses the future growth and demand, which is based on changes to socio demographic and population increases. The forecasts of supportable retail floorspace by both region and centre type presented in this report are based on the following main steps:

1. Prepare forecasts of population growth to 2031.

2. Prepare forecasts of total available retail demand, based on the forecast population level and average per capita retail spending.

3. Prepare forecasts of retail demand directed to retail category and centre type.

Whilst future growth is the primary driver of retail demand, a specific assessment of area attributes needs to be considered to recommend specific areas for further development. Steps involved in preparing the specific assessment are detailed below.

Competitive Assessment

Over time as developers and tenants compete to ensure rental equilibrium, the retail market is generally balanced, however an undersupply may exist in the short term given development constraints.

To test the potential latent demand of retail floorspace, the performance key retail (anchors) provides the most appropriate indicator of an areas ability to supply more floorspace. Anchors within Clarence to be assessed include major supermarkets and discount department stores.

1.4 Policy & Planning Context

The development of activity centres, retail and commercial areas is undertaken against a background of planning provisions and strategic directions at the Local, Regional, State and National levels. These provisions and directions are not static but must be reviewed on a regular basis to ensure that the population of an area is appropriately catered for in terms of activity centres and the retail offering.

Chapter 2 of this report considers the relevant planning provisions and strategies of Clarence, Greater Hobart and the Southern Tasmanian Region in relation to retail and commercial development.

A number of recommendations have been developed out of this assessment and they are provided to Clarence City for potential inclusion within any future planning scheme and or strategic plan.

1.5 Retail Types

For the purposes of assessing future retail demand within activity centres and the effect this may have to the centre hierarchy, we have focused on three categories of retail being

1. Supermarket and grocery stores,
2. Discount Department Stores (DDS) and
3. Specialty retail.

The three categories are important to the success of an activity centre with respect to attraction, range of goods and resulting economic viability. The contribution each retail type makes to an activity centre is discussed further below.

- Supermarket and Grocery Stores: these stores are major anchors for activity centres, particularly in Neighbourhood Activity Centres (NACs) as they attract regular shopping visits. Large supermarkets generally need a primary trade area of 8,000 – 10,000 residents and a full line supermarket can range in size from 2,500sq.m and above. Smaller and niche supermarkets also play an important role in delivering groceries and can be sized up to around 1,500sq.m for Aldi and IGA stores. Generally these supermarkets provide a top-up convenience role.

- Discount Department Stores: Discount Department Stores have emerged as popular form of retailing in a range of activity centres. Possible tenants include Big W, Kmart and Target and have a trade catchment of 30,000 – 50,000 residents. With respect to store size, discount department stores tend to range from 4,000sqm to 8,000sqm. A major Department Store generally requires a catchment of over 100,000 people, however smaller format Department Stores are emerging. If a Department Store tenant (such as Myer, David Jones) is considering locating within Clarence, Rosny should be considered the key location given its status as the Principal Activity Centre (PAC).

- Specialty Retail: these stores are supported by both major anchors detailed above and are important to a centre's viability, particularly in terms of their potential to pay rent at a premium, whilst anchor stores negotiate discounted rents. Specialty retail may include food (bakers, butchers etc) and non food offer such as apparel (clothing and accessories) and newsagents, chemists etc. An average floorspace is around 100sqm.

1.6 Defining an Activity Centre Hierarchy

Activity Centres can be broken down into a broad hierarchy. This hierarchy is generally based upon the role and function each centre plays. There are a number of different recognised hierarchies dependent upon the study; however all are generally based upon around the size of the population catchment they serve.

Establishing a long term hierarchy of retail centres is best informed by evaluating the role and function of current activity centres, including breakdown of retail floorspace by major tenants, sizing and retail category.

It also requires an understanding of the various formats of retail floorspace that are appropriate in the retail hierarchy (i.e. discount department stores and supermarkets).

In general, the role and function of each centre is determined by:

- Existing floorspace provision, particularly for higher order retail offer.
- Existing tenancy composition, particularly for major anchor stores.
- The relative catchments of each component of retail floorspace.
- Geography of the retail catchment including consideration of a distribution of centres.

Whilst there is no defined retail hierarchy within the Clarence Planning Scheme 2007, there are a number of key centres within Clarence that perform an actual hierarchy.

Retailing is generally the primary focus of an activity centre, however activity centres provide places of community, social, employment and living.

The authors recommend that Council adopts the four categories of activity centres relevant for the Clarence hierarchy.

- Principal Activity Centre
- Neighbourhood Activity Centre
- Specialist Activity Centre
- Local Activity Centre

Principal Activity Centres

These centres are expected to source trade from a trade area of up to 200,000 persons and support floorspace of generally between 80,000 and 120,000sqm of retail GLA. **Rosny Park** – Eastlands is the Principal Activity Centre for Clarence.

Principal Activity Centres are sub-ordinate to the Central Business District (Hobart), particularly in regard to the provision of employment mixes and non-retail floorspace.

The critical mass of retail floorspace allows for increased activity in the entertainment, cultural and social sectors.

A Principal Activity Centre provides:

- One-stop shopping for all needs
- Comprehensive coverage of the full range of retail needs, containing a combination of full line discount department stores, supermarkets, services, chain and other specialty retailers.
- Typically includes a number of entertainment and leisure attractions such as cinemas, arcade games and soft play centres;
- Provides a broad range of shopper facilities (car parking, food court) and amenities (rest rooms, seating); and
- Office and civic services.

Neighbourhood Activity Centres

These centres have a primary role of providing weekly shopping needs to residents principally in regard to food retailing, and essential community services. They are also supported by a network of speciality retailers and other businesses meeting household and business needs.

They generally support a catchment of up to 30,000 persons and are generally delivered early in a development cycle to encourage a wider mix of community uses to establish.

The key features of these centres are outlined as follows:

- Total GLA retail is generally less than 10,000 sq.m, with potential for additional non-retail supporting floorspace.
- Services residential neighbourhood.
- Usually has extended trading hours.
- Caters for basic day to day retail needs.

However, in reality neighbourhood centres take a number of formats and are increasing in size to provide an expanded 'non-food' retailing offer. As the weakest link in the retail hierarchy they are doing this in response to the growth in food retailing at larger centres.

From The authors' perspective, what is most important for these centres is the size of the supermarket and the non-food offer which can be provided as mini-major. This is because the format of retail offer impacts on a centres catchment. Shoppers will travel further for non-food retail formats and it is therefore not appropriate to offer these formats in neighbourhood centres in significant volumes unless the centre can demonstrate a wider mix of other community services and businesses.

Clarence currently has two neighbourhood activity centres (Lindisfarne and Howrah), however the economic modelling undertaken in this report demonstrates that there is a potential and need for a third neighbourhood activity centre located in the southern region of Clarence (Rokeby, Oakdowns or Lauderdale).

For a Neighbourhood Activity Centre to operate effectively it is essential that they be located on a major transport route and or on an intersection and be of a sufficient size to accommodate a major supermarket along with specialty shops. This severely limits existing land parcels which are available for development as Neighbourhood Activity Centres. The only large parcels of land available for development are south of Rokeby at Oakdowns and Lauderdale.

It is noted that the currently zoned Commercial land in Rokeby is not ideally suited to a neighbourhood activity centre mainly due to its lack of connection to a transport route. This is discussed in greater detail elsewhere in this report.

Specialist Activity Centre

There are also a range of centres that do not fit the general typology of a traditional activity centre. These can include:

- Tourist orientated town / centre / precinct.
- Homemaker / Bulky goods precinct
- Discount / Factory Outlet Centre
- Transit Orientated Centre
- Other new forms of specialist centres are evolving with retail innovation such as a Health Orientated Centre.

These centres are generally destination centres, and can attract a regional catchment to meet specific needs, and hence are difficult to define in terms of catchment served and services provided.

The bulky goods outlet at Cambridge Park is defined as a specialist activity centre.

Local Activity Centre

In addition to the activity centre classification above, Local Activity Centres also provide for convenience needs for residential areas. These centres do not include a major anchor tenant and are unlikely to influence the development or structure of an activity centre hierarchy for Clarence; hence they have not been assessed in great detail within this report.

Examples of Local Activity Centres in Clarence include Shopping Strips on Rokeby Road, Mornington Road, Clarence Street and South Arm Road -amongst others.

1.7 Retail Hierarchy | Southern Tasmanian Regional Planning Project

Key Policy Issues

The Southern Tasmanian Regional Planning Project is a cooperative planning project being undertaken between the 13 Councils which make up the Southern Tasmanian Region and the State Government. As part of this project a State of the Region Report is under development. Included within this report is a Key Activity Centre Chapter, which considers all majority activity centres within Southern Tasmania; the role they play and their relationship to transport, settlement and population centres.

The State of the Region Report makes the following relevant findings.

The Hobart CBD should remain as the primary retail centre, as well as the "pre-eminent centre" for public administration, financial services, and commerce. This primacy is at risk from the rise of outlying retail centres such as the Airport DFO and Cambridge Homemaker Centre and possible commercial office buildings at the Airport that have the potential to detract from the CBD.

The State of the Region Report defines the Activity Centre Hierarchy as follows:

Primary Activity Centre

- *Hobart CBD (dominant centre and will continue to play role as major employment centre; continued investment and development should build economies of agglomeration, and level of activity beneficial to the attraction of the capital).*

Principal Activity Centre

- *Central Glenorchy (Principal centre for the north west urban area, currently the largest and most well defined centre);*

- *Rosny Park (Principal centre for the eastern urban area, the largest centre in that area, already having some diversity of employment);*

- *Kingston (Principal centre for the southern urban area, the largest centre in that area, and relatively strong growth forecast).*

Major Activity Centre

- *Moonah (Next largest centre in Glenorchy with a good diversity of land use in the vicinity, required to service large population in the area and supplementing the role of Central Glenorchy);*

- *Bridgewater (Required to service area of Brighton LGA just north of the Derwent River and catering for expected residential growth);*

Rural Services Activity Centre

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

Whilst this hierarchy differs somewhat from the hierarchy adopted in the preparation of this report, this builds upon the Southern Tasmanian Regional Planning hierarchy by identifying a number of smaller centres.

1.8 Clarence Activity Centre Hierarchy

This section reviews the retail framework for centres within Clarence according to the defined Activity Centre Hierarchy detailed in the previous section.

Table 2. Activity Centres Hierarchy

Activity Centre	Clarence Activity Centre Hierarchy	Southern Tasmania Regional Planning Project Classification	Comment
Rosny Park (including Eastlands)	Principal Activity Centre (PAC)	Principal Activity Centre	Equavilent classification and secondary to the Primary Activity Centre of Hobart.
Lindisfarne Town Centre	Neighbourhood Activity Centre (NAC)	No classification	Subordinate to a Major Activity Centre within the STRPPC.
Howrah / Shoreline Shopping Centre	Neighbourhood Activity Centre (NAC)	No classification	
Bellerive Town Centre		No classification	
Rokeby		No classification	
Lauderdale		No classification	
Cambridge Park	Specialist Activity Centre (SAC)	TBA	Business, employment and mixed use orientated SAC
Richmond Town Centre	Specialist Activity Centre (SAC)		Tourist orientated SAC

Source: MacroPlan Australia (2010)

Rosny Park

Rosny Park is the most prominent centre within Clarence and serves a regional role with just over 90,000sq.m of mixed use floor area, including the Eastlands Shopping Centre. Rosny Park is the administrative centre of Clarence providing the majority of the city's office space, Council Chambers, Library and Police. It also acts as the major social and activity hub with a number of restaurants, cinema complex and similar facilities.

Eastlands Shopping Centre, located within Rosny Park, is a major shopping centre providing a total floorspace of 33,796sq. Including two DDS's (Big W and K-mart), two mini-majors and over seventy speciality shops. Eastlands Shopping Centre is also anchored by two supermarkets (Coles and Woolworths). Rosny Park also offers a number of bulky goods stores such as Bunnings

Rosny Park also provides a major transport and transit role, with major bus routes serving Clarence and Hobart. The bus route between the Hobart CBD and Rosny provides the most regular public transport service in Tasmania with buses operating approximately every 10 – 20 minutes.

Cambridge Park Precinct

Further to the east from Rosny Park, Cambridge Park has emerged recently as a focus for bulky goods retailing and commercial and campus style offices. It has done so as a result of the Tasmanian Planning Commission's (formerly Resource Planning and Development Commission) approval of a Bulky Goods Outlet on Kennedy Drive Cambridge and corresponding planning scheme amendment. Although the approval and amendment only provided for the development of a bulky goods outlet; the outlet itself has attracted a number of other developments which would be unlikely to be found in a 'typical' industry zoned area. The area has developed as a discrete precinct providing a service and retail offering unique within Southern Tasmania. The precinct or island is shown in the image below. The Clarence Industrial Strategy considered this area and made a similar recommendation in that the area be developed for Campus Style Offices.

The majority of bulky goods / showroom floorspace is located at the dedicated bulky goods / showroom centres at Cambridge Park. This centre is clustered on the northern side of the

Tasman Highway, with Harvey Norman and other large format national retailers anchoring the precinct.

The Cambridge Park Precinct is located between Hobart's airport and seaport and provides opportunities for commercial and industrial development, this is reflected in a number of recent developments in Cambridge, including:

- Homemaker Centre
- Aurora Energy depot and offices
- Hydro Tasmania Consulting offices
- Research laboratory and processing facility
- City East Business Park
- Hardware Outlet

These proposals follow the major upgrading of the Hobart International terminal.

The rapidly growing industrial precinct (e.g. subdivisions to the north side of Kennedy Drive and Cambridge Aerodrome) in Cambridge is also generating significant employment opportunities.

Hobart Airport

The Hobart International Airport is located off the Tasman Highway and is operated by Hobart International Airport Pty Ltd and is leased from the Federal Government.

The airport currently has the following commercial operations

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

The airport is yet to assume the role of an activity centre as it has no retail offering, however if the airport operators are successful in their bid to establish a Direct Factory Outlet on the site it would significantly alter the activity centre hierarchy within the Southern Tasmanian Region. It is important to note that the gross floor area proposed is 6,000m2 larger than Eastlands at Rosny, the largest shopping complex in Tasmania.

As recently as 6 March 2010 Brett Reiss CEO of the Hobart Airport stated at an industry briefing that he expected the project to come online by 2011.

The 2009 Hobart Airport Master Plan (Preliminary Draft) contains the following table showing the expected development of 9 separate precincts. The table overleaf details key components of the Master Plan that may influence Cambridge activity centres.

Table 3. Hobart Airport Master Plan Precincts

Precinct	Uses
1	**Retail - Uses including but not limited to retail and bulky goods.** Precinct 1 includes the approved Direct Factory Outlet (DFO) development, Homemaker Centre and Bunnings. In total, the precinct delivers approximately 60,000m2 of retail space surrounding a centralised car park.
2	**Mixed Use and Commercial - Uses including but not limited to hotel, fuel station, fuel retail, child care centre, kennels, other retail and restaurants** The most developed of all the precincts, Precinct 2 already contains the new hotel and fuel station, caravan park, an existing child care centre and kennels for Quarantine. It is proposed that additional retail / mixed use development occur along the southern part of Loop Road benefiting from frontage to passing traffic.
3	**Commercial - Uses including but not limited to aviation-related businesses, industry and freight logistics.** Located adjacent to the Tasman Highway and the airside boundary, Precinct 3 has visual prominence and is considered to have commercial potential for high quality office developments for airlines, government agencies and service providers as well as enabling airport-related industries that can capitalise on airside access in the longer term.
5	**Trade Centres and Retail - Uses including but not limited to commercial office space, trade centres, retail and rental car-related uses.** Precinct 5 has the potential to be attractive for a range of development types. It is anticipated that the proximity of the precinct to the Terminal itself could attract commercial development with direct relationships to air travel and aviation services. Proximity to Holyman Avenue is anticipated to also attract other commercial developments with the potential to create an office / business park arrangement
8b	**Recreation - Uses including but not limited to tourism, convention centre and accommodation** Precinct 8b has a unique point of difference in that it has direct access to beach frontage onto Frederick Henry Bay to the south. Building on this location and its attributes, there is a longer term potential to include a short-stay accommodation zone including recreation and other related tourist uses which might be attractive to air travellers who wish to be close to the airport itself. The land within precinct 8 is also subject to a freehold arrangement and as such is required to undergo a different development process to Commonwealth land.

The future development of the Hobart Airport is outside the planning control of Clarence Council as the airport is located on Commonwealth owned land which is not subject to local planning laws and regulations. Development of the proposed Direct Factory Outlet does not require a planning permit to proceed.

2 Planning Analysis

There are a number of planning provisions and strategies which have the potential to impact upon the development, expansion and or improvement of activity centres. This section considers these in order of importance. It also considers them in relation to the existing activity centres and the associated hierarchy as listed previously.

2.1 Clarence Planning Scheme 2007

The following lists the relevant sections of the Clarence Planning Scheme 2007 (the scheme) in relation to the key activity centres. Sections taken from the scheme are highlighted in italics and comments follow.

Planning Policy Framework

2.2.1 Key Influences

(a) Overview

The development of this planning scheme has been guided by Council's understanding of the critical land-use issues which are likely to challenge the City's future growth and development to 2050. A brief summary of the key land-use issues are provided below.

(d) Economic Development

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

2.2.2 Vision – Strategic Framework

(b) Clarence 2050

Clarence 2050 provides the strategic framework for Clarence over the next 50 years. The plan identifies a number of social, economic and environmental objectives and outlines broad strategies for achieving them. It therefore leads the Council's strategic approach to managing the City's resources and facilities. In encouraging Council and its stakeholders to consider what the City should be in 2050, it focuses on four key areas:

- *Social.*
- *Economic.*
- *The environment.*
- *Government.*

(e) Strategic Land Use Framework Plans

The major strategic directions identified in the Strategic Land Use Framework Plans include:

Identification of the urban growth boundary of suburbs and villages.

Recognition of the retail centre hierarchy.

2.2.3 Objectives, Strategies and Implementation

(c) Economic Development

(i) Retail and Commerce

Overview

In 2000 there was 62,000m2 of retail floor space in the City. This is dominated by Eastlands at Rosny Park, with 44,000m2. In 1999 /2000, several new and important developments commenced in this centre, indicating strong interest in commercial development and highlighting the strategic importance of the regional centre.

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

The growth of other centres is most influenced by the rate of local population change and accordingly some expansion and revitalisation is anticipated in Howrah and Lindisfarne.

Key Issues

The primacy of Rosny Park within the Clarence retail hierarchy.

The future place of Rosny Park within the hierarchy of retail centres of the metropolitan area.

The presentation and image of the Rosny Park retail centre.

The need for improved presentation of all neighbourhood and community centres.

The ability to provide for business growth and revitalisation in niche centres at Bellerive / Kangaroo Bay and Richmond.

The need to provide for specialist bulky goods stores in multi-use complexes or industrial centres, where there is inadequate or inappropriate space available in established retail centres.

Objectives

- *To reinforce the Rosny Park business area as a vibrant facility and as the prime retail and commercial centre serving the Clarence community and nearby communities from the southeast and the Western Shore.*

- *To reinforce the role of the Rosny Park business area as the major regional centre within the greater Hobart area.*

- *To ensure the long term viability of all of the City's retail centres.*

- *To ensure that the design, presentation and use of commercial and retail properties complements the role of the City's retail centres.*

- *To ensure that the heritage assets of the Richmond business centre are utilised to greatest effect in the economic growth of the village.*

- *To facilitate a range of tourism, recreational, commercial and residential uses and developments at Kangaroo Bay.*

- *To provide for specialist/ bulky goods stores in locations which balance the location preferences of businesses and the needs of customers.*

Strategies

Maintain the City's retail hierarchy, including the pre-eminence of the Rosny Park business area.

Programs that upgrade the appearance and presentation of the Rosny Park business area and other key retail centres.

Strengthen the range of supporting cultural and community facilities in the Rosny Park Business area and other key retail centres.

Develop a greater commercial link between the Rosny Park and Bellerive Village centres and provide for an exciting range of well-designed commercial, tourism, recreational and residential developments in and around the Bellerive Village centre and Kangaroo Bay.

Promote the heritage values of Richmond, to encourage a greater range of tourism businesses as well as local services.

Rezoning of land for retail purposes on freestanding sites separated from existing centres will not be supported.

Provide for specialist/ bulky goods stores in industrial centres.

The strategies will be implemented by:

- *Applying the Business Zone to existing retail areas and to limited areas which adjoin these areas so as to provide for expansion which reinforces the retail hierarchy and applying the Local Business Zone to existing service business areas and to local shopping centres.*

- *Implementing a Special Development Zone for the Bellerive/ Kangaroo Bay area in recognition of its special qualities and its opportunities for enhancement.*

- *Implementing a Heritage Overlay on Richmond, to ensure planning decisions to protect and enhance the heritage values of the village.*

- *Implementing Clarence Policy - "Clarence Retail Policy" which requires planning decisions to support the retail hierarchy and be consistent with the Land Use Strategy.*

- *Implementing Clarence Policy - "Cash in Lieu for Parking" which requires planning decisions to provide for car parking as cash in lieu, to be used for developing or maintaining public land for car parking in designated locations.*

Supporting actions include:

- *A comprehensive retail study of the hierarchy, in the context of the greater Hobart area, examining the future role of centres, potential niche markets, the mix of shops, future floor space requirements and urban design concepts.*

- *A program of initiatives to encourage growth of the Rosny Park business area, including attracting anchor stores, offices and entertainment facilities.*

- *Revitalisation of the Lindisfarne shopping centre, through urban design initiatives.*

- *Continuing urban design improvements in the Richmond town centre, consistent with enhancing both its significant heritage assets and the commercial opportunities that has created.*

- *A progressive series of urban design improvements in small centres, to include street tree planting, tourist information, public seating, public art and other facilities.*

The planning policy framework due to its strategic nature is relatively broad, it focuses upon Rosny Park as having primacy, however it provides little detail with respect to the other Activity Centres within the City and how they should be developed. This presumably is due to the fact that a Retail and Commercial Analysis such as contained within this report has not previously been undertaken. Without such detail within the scheme there is less guidance with respect to development assessment, planning scheme amendments/rezoning and strategic direction with respect to the future development of Clarence's Activity Centres. Activity Centres as previously stated are key strategic assets of a city and/or region, it is therefore appropriate that they receive elevated status within any strategic plans or planning scheme. Specific statements within planning schemes which refer to the desired role and character of activity centres would assist in planning for a centres future growth and development.

Many of the specific actions, such as *Revitalisation of the Lindisfarne Shopping Centre, through urban design initiatives* would appear to have been implemented It is noted that Activity Centre beautification projects are currently underway for Kangaroo Bay to Bellerive Village and Lindisfarne Village. Actions such as these if implemented effectively positively influence the future growth and vibrancy of an activity centre.

This report fulfils and is in response to the key supporting action above, which requires a

"*comprehensive retail study of the hierarchy, in the context of the greater Hobart area, examining the future role of centres, potential niche markets, the mix of shops, future floor space requirements and urban design concepts."*

Although not necessarily directly related to retail expansion, the Tasmanian Planning Commission (TPC) (formerly the Resource Planning and Development Commission) at a hearing into a proposed retail development at Lauderdale determined that it was inappropriate to locate new retail activity centres outside the Urban Growth Boundary as defined in the scheme. The TPC stated that[2]

"Notions of retail strategy or hierarchy should not be taken in isolation of urban strategies, as retailing is part of the urban fabric. The strategy is that Lauderdale and South Arm are not preferred growth areas. If there is valid departure to planning scheme policy in terms of urban growth and the location of retail centres this should be firstly addressed through the Planning Policy Framework."

It is considered unlikely therefore at the TPC would support any new activity centre outside the Urban Growth Boundary unless the Urban Growth Boundary as contained on page 11 of the scheme was altered across the entire municipality and that detailed justification for this alteration be included. Detailed justification could take the form of a Structure Plan for Lauderdale which it is recommended be undertaken by Council. This Structure Plan should consider issues such as land capability, future residential growth, and transport linkages

It should be noted that Urban Growth boundaries are mainly based upon residential growth and not commercial growth. Although commercial development may provide for residential retail demand it can and does provide for other uses which are unrelated to residential growth.

Clarence Retail Policy

The scheme also sets out a Clarence Retail Policy as listed below:

2.3 Clarence Planning Policies

2.3.1 Clarence Retail Policy

(a) Policy Basis

[2] Clarence Planning Scheme 2007, draft Amendment A-2008/25 and Draft Permit no D-2008/97

In 2000 there was 62,000 m2 of retail floor space in the City. This is dominated by Eastlands at Rosny Park, with 44,000 m2. In 1999 /2000, several new and important developments consolidated the standing of Rosny Park as a regional centre in the metropolitan context.

There are also strong indicators of growth and business revitalisation at Bellerive / Kangaroo Bay and Richmond, where there are specific attractions.

The growth of other centres is most influenced by the rate of local population change and it is therefore necessary to ensure these can be encouraged to develop in ways which best meet the needs of their communities.

(b) Objective

To consolidate and improve the existing hierarchy of retail centres within the City.

To encourage investment in retail development.

To encourage new development which builds on the identified role and character of each retail centre, to create a vibrant retail sector.

(c) Policy

It is Clarence Planning Policy that in considering an application to use or develop land for retail purposes, the Council will have regard to:

The need to protect the retail hierarchy and reinforce the established retailing patterns.

The need to encourage the development of attractive shopping venues.

The desirability of new developments being designed to suit the urban form of the particular centre, enhancing its special characteristics.

Where appropriate to the urban form of the centre, encourage residential use above ground floor, to promote casual surveillance and after business hours activity in those centres.

Encourage Specialist/ Bulky Goods Stores and Superstores in locations which reinforce the retail hierarchy and do not fragment smaller centres, thus avoiding locations in community centres and small neighbourhood centres.

The data analysis contained within section 5.10 of this report clearly identifies a need for another activity within Southern Clarence. As previously stated the Tasmanian Planning Commission is unlikely to support the development of an Activity Centre outside the currently defined Urban Growth Boundary. As the majority of Southern Clarence is outside this boundary, the land potentially available for the development of a new~~n~~ Neighbourhood Activity Centre is limited. There are a number of basic criteria which need to be met for land to be appropriate for activity centre development, including but not limited to:

- Located on a major transport route;
- Has a sufficiently large population catchment and market;
- Is of sufficient size in area.

Although this report does not consider the broader impacts of amending the boundaries of the urban growth area;, such as increasing the availability of residential land and growth it is considered that amending the growth boundary or exempting activity centres from the growth boundary would greatly improve the flexibility for establishing a new activity centre within Southern Clarence.

Amending the growth boundaries could also be accompanied by the development or expansion of a Retail Policy for Clarence, which encourages the development of an Activity Centre within Southern Clarence. This policy could set out the types of information required to support the development of any new Activity Centre or rezoning required for such, this could include:

- Economic need and impact analysis
- Demonstration of the need for a new activity centre.
- Future retail demand

As stated in the previous section the existing Clarence Retail Policy does not detail the city's activity centres or their hierarchy. It is considered appropriate that the planning scheme should do so and include some reference to the desired future role and character of these centres.

Use and Development Categories

The scheme defines five relevant categories primarily for retail/commercial use and development; these are defined by the scheme as follows:

Shop -Land used to sell goods or services, or to hire goods, but does not include uses defined elsewhere in this clause.

Shopping Centre - A group of 6 or more Local Shops, Shops, Restaurants and/or Take Away Food Shops but may include other uses on the same lot.

Local Shop - Land used to sell food and other daily needs goods, or as a hairdressing salon, pharmacy, newsagency, betting agency, or a self-service laundry principally serving the surrounding neighbourhood. It does not include a Restaurant.

Specialist/ Bulky Goods Store - Land used to sell goods, with a gross floor over 1000 square metres, that has at least 100 square metres of floor space trading in three or more of the following categories:

- Fabrics and other soft goods retailing.
- Furniture retailing.

- Floor covering retailing.
- Domestic hardware and houseware retailing.
- Recorded music retailing.
- Sport and camping equipment retailing.
- Toy and game retailing.

Office - Land used for administration, or clerical, technical, professional or other like business activity. No goods or materials intended for manufacture, sale, or hire may be stored on the land.

The following table lists the classification of each of these uses in the relevant zones of the scheme.

P – Permitted

D – Discretionary

X- Prohibited

Table 4. Zone and use classification

Zone	Local Shop	Shop	Specialist Bulky Goods Store	Shopping Centre	Office
Residential	D if <100m2in floor area	X	X	X	X
Low Density	X	X	X	X	X
Rural Residential	D if <100m2in floor area	X	X	X	X
Village	D if <100m2in floor area	X	X	X	X
Industry	D if <100m2in floor area		P must be located on 66 Kennedy Drive (CT 14586/1)	X	X
			D Located at other than 66 Kennedy Drive (CT 146586/1)		
Commercial	D	D	D	D	D
Local Business	P if <100m2in floor area	D	X	X	D
	D if >100m2in floor area				
Rural	X	X	X	X	X
Intensive Agriculture	X	X	X	X	X
Landscape Skyline Conservation	X	X	X	X	X
Recreation	X	X	X	X	X

The planning scheme provides for the development of Activity Centres in two zones, Commercial and Industry and only at Kennedy Drive for the latter. Kennedy Drive has developed as a key Activity Centre of Clarence, this Activity Centre although being within the Industry Zone is likely to continue to be developed for offices, bulky goods outlets, as an administrative centre and for warehouses. It is considered unlikely that the precinct will be developed for “traditional” industrial type use and development. The future development of Kennedy Drive is therefore likely to be ‘out of character’ with the other industry zoned areas of Clarence. Having an activity centre within the Industry Zone has the potential to undermine the remaining Industry Zoned areas. In terms of consistency use and development approved at Kennedy Drive should also be approved in other industry areas either though it may not necessarily be as appropriate.

Cambridge Park is currently zoned industrial and as outlined in the Clarence City Industrial Development Strategy May 2007[3]:

There is presently a total of 324 hectares (ha) of industrial zoned land in Clarence City, excluding the Hobart International Airport. Presently only around 100 ha of this land is presently occupied, leaving a net balance of more than 220 ha of vacant land. Of this, Risdon Vale contains around 54 ha that are not considered suitable for future industrial development (this issue is discussed later in this report). This reduces the vacant industrial land to approximately 165 ha Industrial Strategy

There would appear therefore to sufficient land within the municipality to accommodate for future demand for industrial land. It is therefore considered appropriate that the land within the Cambridge Park Precinct should be rezoned or a new overlay introduced into the planning scheme which provides this commercial/industrial type use and development.

There is little within the scheme to encourage increased residential density within or surrounding activity centres. It has been demonstrated that increasing residential density with or close to activity centres makes them more attractive. Rosny Park in particular suffers from a lack of activity outside of normal trading hours. Once the shops close the centre becomes deserted creating issues of public safety and ineffective usage of infrastructure and resources. Although increased residential density within these areas is unlikely in the short term, encouraging such an increase in density could be part of a longer term strategy to improve the amenity of the city’s activity centres. This is considered to be particularly the case for the Kangaroo Bay Bellerive Area.

Clarence has a relatively high diversity of activity centres in the State, it has the largest shopping centre complex (Eastlands at Rosny Park), a Specialist Bulky Goods Homemaker Centre at Cambridge and lower order retail offerings. There are obviously significant differences between and across these retail centres (some of which are considered below), however the planning scheme, controls and regulates their use and development in a homogeneous fashion. The same Use and Development Standards and allowable use and development categories apply in each zone. Although there is some potential to rely upon the Planning Policy Framework, the statements contained within the framework focus more upon strategic actions than planning provisions to direct appropriate use and development and or provide signals to developers. It is problematic to rely upon the Planning Policy Framework due to its nature and the lack of direct

[3] Clarence City Industrial development Strategy, AEC, May 2007

linkages with the zoning provisions. The scheme lacks the necessary signals to encourage diversity across the retail areas are provided within the scheme. Consideration should be given to developing a set of desired future character statements for each activity centre and including these within the Planning Policy Framework and referencing these within the Specific Decision Requirements for the relevant zone.

2.2 Regional Perspective

The Southern Tasmanian Regional Planning Project

Overview and Rationale:

The Southern Tasmanian Councils Authority is the management body for the Southern Tasmanian Regional Planning Project (STRPP), which commenced in late February 2009.

The initiative is the result of an agreement between the State Government, the Southern Tasmanian Councils Authority, and (the STCA), and the 12 southern Tasmanian Councils and aims to achieve the following outcomes:

- A comprehensive regional land use strategy for the region.
- An infrastructure investment strategy for the region.
- The development of coordinated, consistent and contemporary planning schemes for all councils involved, based on the common strategy.

One of the main aims of the project is to develop a Metropolitan Settlement Strategy which will amongst other things

- *Define a nominal 10 year Urban Growth Boundary and a nominal 25 year Urban Growth Boundary. Land within the 10 year UGB will be zoned appropriately for development within the new draft planning schemes. Land within the 25 year UGB will be flagged as intended 'future urban land' within the Strategic Framework.*
- *Set forth the preconditions necessary for 'future urban land' to be rezoned for development purposes.*
- *A hierarchy of Activity Centres will be recognised.*

As Council are a signatory to the project and the fact that the project will be setting growth boundaries for the entire region it is considered essential that Council be actively involved in the development of this project.

Planning Directive No 1 Common Key Elements Template for Planning Schemes

The Tasmanian Planning Commission is in the process of finalising the Common Key Elements Templates the contents of which are to be included in all future planning schemes. All Tasmanian Councils have agreed to introduce new planning schemes based upon this template.

The proposed outputs of the Template are:

1) A revised Common Key Elements Template for planning schemes including expanded Exemptions
2) A set of standard (mandatory)planning scheme provisions for State interests and national requirements
3) A set of 'best practice' (optional) schedules and zone provisions deemed to be 'desirable' which can be adopted by planning authorities.
4) A revised Template Guide
5) A drafting protocol for preparation of planning schemes based on the Template.

The template contains 19 standard Zones, those most relevant to this report and their purpose and advice on application are:

	Standard Zone	Advice on application
Urban Mixed Use	To provide for integration of residential, retail, community services and commercial activities at higher densities in urban locations where some aspects of residential amenity may be impacted on by other activities in the area	*The Urban Mixed Use Zone encourages a mix of uses to provide for people living, working and recreating in the same area. Density of development is likely to be higher than the Residential and Inner Residential Zones and maximizes the advantages of urban locations which reduce car reliance and promote walking, cycling and public transport use and provide a high level of self containment* *This zone will also provide for inner urban growth areas particularly any new higher density Transit Oriented Developments (TODs) based on public transport nodes.*
Village	To provide for small rural centres with a mix of residential, community services and commercial activities where residential amenity has a priority.	*To provide for a mix of residential and small scale commercial and community activities in a small town or village setting where a priority is placed on residential amenity.*
Local	To provide for basic retail,	*The Local Business Zone is provided for a*

Business	business, food and community services which serve a local area	*mix of retail, office, and community services in local centres. These may be in rural towns or in suburban centres of larger cities. It is anticipated that the range and scale of retailing will be smaller than in the Business Zone and the Central Business Zone. The scale of centre may range from a cluster of a few local shops to a small town centre.*
Business	To provide for a concentration of retailing, offices and community services serving a town or group of suburbs.	*The Business Zone is provided for a mix of retail, office, and community services in larger town or suburban centres.* *It is anticipated that the range and scale of retailing will be larger than in the Local Business Zone but not as extensive as the Central Business Zone. The scale of centre may range from a larger town centre to a substantial suburban shopping centre serving a number of surrounding suburban areas.*
Central Business	To provide for an extensive range of retail, business, professional, food, civic and cultural, hotel, tourist and community functions within a major centre	*The Central Business Zone is to provide for retailing, offices, entertainment, and community services concentrated in a major centre. This is the highest level in a retail centre hierarchy and would serve regional or large sub-regional areas.*
Commercial	To provide for large floor area retailing and service industries in locations close to and which support viability of a Business or Central Business Zone.	*The Commercial Zone is to provide for a mix of large floor area retailing and service industries normally desiring high levels of vehicle access and substantial car parking for customers. Most of the bulky goods, warehouse or home maker centres would fit this zone.*
Particular Purpose	The Purpose Statement will be unique for each zone – so the suggestions are really for the Guide rather than words in the Template.	*To recognise the special value of land in providing for a major community or other facilities which have significant impacts on surrounding zones and are not appropriate as part of those zones. This zone should not be over or inappropriately used where another zone is possible, for example where local*

		schools are better treated as part of the surrounding residential zone.

It is considered that all of Clarence's activity centres other than possibly Cambridge Park would fit within the standard zone templates.

The expectation is that all these zones are likely to be included within future planning schemes.

Greater Hobart

Four cities make up Greater Hobart; Hobart, Glenorchy, Clarence and Kingborough. The actions they are taking with respect to developing Retail/Commercial Strategies are listed below. These actions however have been somewhat taken over by the activities of the Southern Regional Planning Project.

Hobart City

Hobart City is in the process of developing a new planning scheme to replace the City of Hobart Planning Scheme 1982 and the Battery Point Planning Scheme 1979. This draft planning scheme has been released for public comment, however it is now on hold pending the outcomes of the regional project.

The most significant retail commercial development within Hobart is the redevelopment of the Myer Centre in the CBD which was destroyed by fire in 2007. The site was recently purchased although no announcement has been on the future redevelopment of the site.

Glenorchy City

Glenorchy is also in the process of developing a new planning scheme and as part of this process they have prepared a *Commercial Land Use Topic Paper*. This is in draft form and is not yet available for public comment.

This paper focuses on the activity centres of Glenorchy, Moonah and Claremont.

Kingborough

During the preparation of the *Kingborough Council Planning Scheme 2000,* Council prepared *Paper 4 Commercial Development Issues, Prepared by Development Services Department, Kingborough Council April 2000*.

This paper is now somewhat dated but recognises the importance of the Kingston Central Business district. This district has been recently upgraded via a street beautification project and major redevelopment of the Channel Court and Kingston Plaza Shopping Centres.

Kingborough has consistently recorded the highest growth of any municipality in Tasmania and is somewhat similar to Clarence in that it is a Satellite City of Greater Hobart. As stated in the above paper "*this is the single largest impact on the hierarchy of commercial development since the City has and will realistically always retain the primary retail service position in the Greater Metropolitan area.*

Kingborough is currently undertaking a **Settlement Strategy** which will cover the issue of retail and commercial development. This is expected to be completed by August 2010.

2.3 Summary of key planning issues

The following lists the key planning recommendations. These recommendations are not listed in any order of priority.

- Amend the planning scheme to refer to Activity Centres as opposed to retail hierarchy;
- Recognise the following Existing Activity Centre Hierarchy within the planning scheme:
    - Principal Activity Centre – Rosny Park
    - Neighbourhood Activity Centre –
        - Lindisfarne Town Centre
        - Howrah Shoreline Shopping Centre
    - Local Activity Centre
        - Bellerive
        - Rokeby
        - Lauderdale.
    - Specialist Activity Centre
        - Cambridge Park
        - Richmond Town Centre
- Recognise the need the need for a Neighbourhood Activity Centre within Southern Clarence
- Develop Desired Future Character Statements for each of the key Activity Centres and insert these into the Planning Policy Framework at section 2.2 of the scheme.
- Include a reference within the Specific Decision Requirements of the relevant zone to these desired Future Character Statements (with emphasis on the Commercial zone).
- Amend or remove the Urban Growth Boundary from page 11 of the planning scheme, it serves little or no purpose as residential development is governed by the residential zone

and the areas in which they are located. It contains little detail and is at a scale which does not provide for close examination

- Amend the planning scheme to provide for increased residential density in or around Activity Centres.

- Rezone the undeveloped area of commercially zoned land at Rokeby from Commercial to Residential.

- Develop a Retail Policy which encourages the development of a Neighbourhood Activity Centre within Southern Clarence. Such a policy to include the following specifications for any centre:

    - Land area in excess of 2ha

    - Located adjacent to a major transport route

    - Has necessary the services and infrastructure connected and or available

- Rezone or introduce a specific overlay to recognise the individuality of Cambridge Park.

- Council is involved in the development of the Settlement Strategy for the Southern Tasmanian Region.

3 Study area

3.1 Metropolitan Context

The City of Clarence is one of 4 City Councils (Clarence, Glenorchy, Kinborough and Hobart) which make up the city of Greater Hobart. In turn Greater Hobart is part of the Southern Tasmanian Region which is made up of 12 Councils as listed below:

- Brighton;
- Central Highlands Council
- Clarence City Council
- Derwent Valley Council
- Glamorgan-Spring Bay Council
- Glenorchy City Council
- Hobart City Council
- Huon Valley Council
- Kingborough Council
- Sorell Council
- Southern Midlands Council
- Tasman Council

The population of the Southern Tasmanian Region in 2008 was 246,162[4].

The Population of Greater Hobart in 2008 was 216,250[5].

[4] *Source: ABS Estimated Residential Population 2009*

[5] *Source: ABS Estimated Residential Population 2009*

3.2 Clarence

It is located on the eastern shore of Hobart and is well located in respect to local community, regional retail and health facilities. Clarence is easily accessed from Hobart via the Tasman Highway.

Clarence is of particular importance given the increasing demand for residential and retail floorspace in Greater Hobart with favourable attributes including:

- Connectedness to the Hobart CBD.
- Transport links (public and private vehicle),
- Availability of non fragmented land parcels, such as Cambridge Airport,
- Few development constraints, and
- Accessibility.

Clarence City shares its municipal boundary with Sorell and Brighton Councils.

3.3 Clarence Study Area

The authors have considered a number of factors in the formulation of a study plan for activity centres within the City of Clarence, including, infrastructure, natural and existing barriers, existing competition, retail expenditure, population growth, existing retail trade and the intended role and function of centres.

With well established residential areas, Clarence has an existing population surrounding the several key activity centres including Rosny Park, Howrah, Lindisfarne, Bellerive and Richmond.

Taking the above into account, Clarence is expected to be influenced by the following:

- Hobart CBD, providing the dominant retail and commercial offer serving southern Tasmania.
- The regional non-food offer within Eastlands / Rosny Park.
- The strong food and convenience role the centre will have for the surrounding residents.
- The location of the city on the eastern shore, making activity centres within the city easily accessible for residents from the broader region.
- The major homemaker and bulky goods precinct at Cambridge airport.

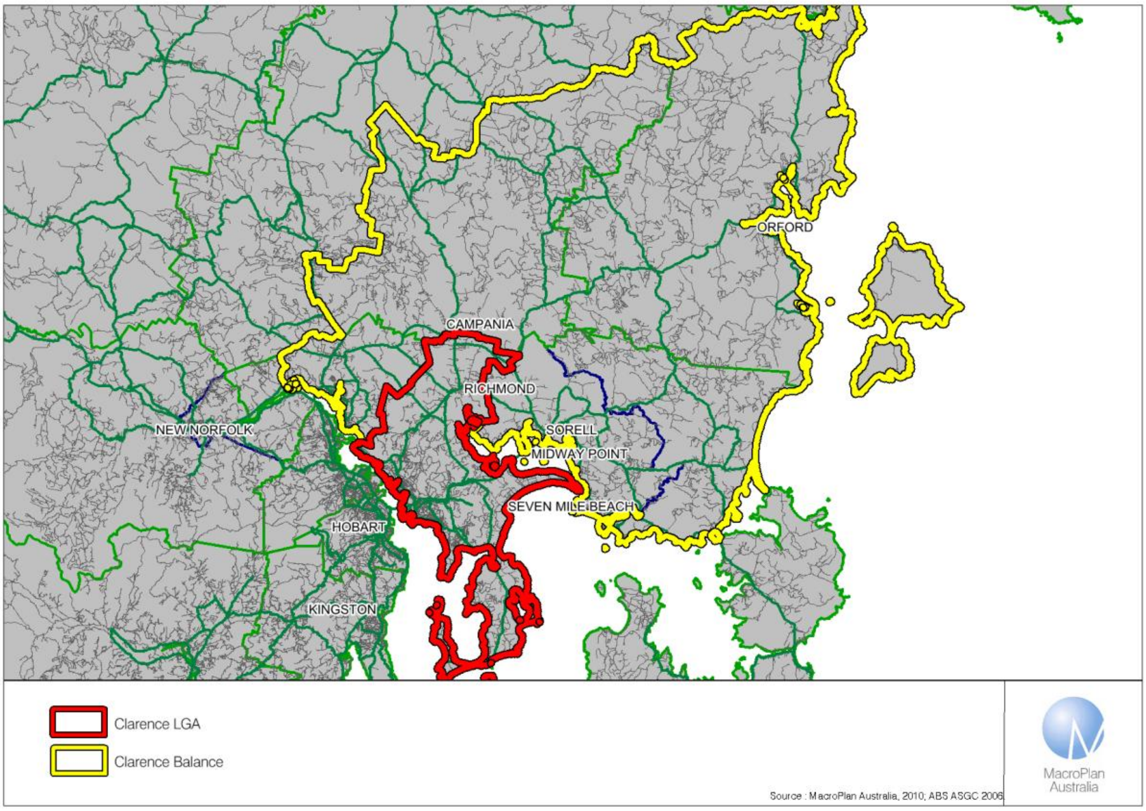
The retail and commercial facilities in Clarence attract visitation from residents within Clarence, and areas beyond the Clarence boundary. To understand the total potential for Clarence activity centres, the study area has been defined to include two discrete sections that are reflective of the source of the majority of trade. The study area is defined in the map below.

- Primary section, which is identified as the City of Clarence boundary, extending approximately 35km north past Richmond to Campania and to South Arm.
- Secondary section which includes regional areas that would be attracted to facilities within Clarence. This section extends an estimated 90km to the northeast of Clarence to include Sorell and Orford, and generally encompasses vast and low-density areas.

As a food and groceries shopping destination, activity centres within Clarence provide for their local community and effectively serve the primary trade area and workers within Clarence. Rosny Park also provides a significant non-food offer, providing the most significant regional retail offer behind Hobart CBD, allowing Clarence to serve residents in regional areas to the east. Being the largest shopping complex in Tasmania Rosny Park also services the eastern shore.

The major homemaker and bulky goods precinct at Cambridge Airport is also a major attractor for all residents across Greater Hobart, and will maintain its prominence as the largest precinct of its type in Hobart.

Figure 4. **Study area Map**



Source: MacroPlan Australia

3.4 Demographic and Socio Economic Analysis of Study area

Retail expenditure depends on income and/or propensity to spend. Income levels deviate from area to area. Regions with proportions of higher income individuals typically have higher than average retail expenditures.

The table overleaf details the key socio-economic characteristics of the study area population, and benchmarks these characteristics with respect to Hobart and Tasmanian averages. The information presented has been derived from the *2006 Population and Housing Census* undertaken by the ABS.

As illustrated, income levels within the study area vary, with Clarence (c) providing a higher individual and household incomes profile of up to 6% in relation to the Hobart and Tasmanian averages. The rural Clarence Balance sustains lower income levels of up to 10% below benchmarks.

There is also a higher representation of family households (73%) compared to Hobart (69%) and Tasmania (70%).

The demand core food retailing is generally consistent across all socio demographic profiles and is likely to be consistent with Hobart's relative food spend.

Table 5. Key Demographic Performance Indicators

	Clarence (c)	Clarence Balance	Metropolitan Hobart	Tasmania
Socio-Economic Snapshot				
Income and Wealth				
Median Individual Income	$24,372	$20,619	23,140	20,696
variation from Metropolitan Hobart	*5.3%*	*-10.9%*	-	-
Median Household Income	$49,873	$42,316	47,008	41,652
variation from Metropolitan Hobart	*6.1%*	*-10.0%*	-	-
Occupation				
Professionals	20%	10%	22%	18%
Managers	12%	12%	12%	13%
Clerical and Administrative Workers	18%	15%	16%	14%
Sales Workers	11%	11%	11%	10%
Community and Personal Service Workers	10%	11%	11%	10%
Technicians and Trades Workers	15%	17%	14%	15%
Labourers	5%	9%	5%	7%
Machinery Operators And Drivers	9%	16%	10%	13%
Occupation by Sector				
White Collar	50%	37%	50%	45%
Blue Collar	28%	42%	29%	35%
Service Sector	21%	22%	21%	20%
Age Distribution				
0-4 years	6%	7%	6%	6%
5-14 years	13%	17%	13%	14%
15-24 years	13%	12%	14%	13%
25-54 years	40%	41%	41%	40%
55-64 years	13%	12%	11%	12%
65-74 years	8%	6%	7%	8%
75+ years	8%	5%	7%	7%
Family Types				
Family Household	73%	76%	69%	70%
Non Family Household	27%	24%	31%	30%
Tenure Type				
Owner	39%	32%	36%	39%
Purchaser	39%	43%	36%	34%
Renter	21%	25%	27%	26%
Other	1%	1%	1%	1%

Source: ABS Census (2006)

Income and wealth are important factors when considering retail expenditure as it generally dictates the amount of disposable income residents in the study area may have. One measure of income and wealth is through analysing the socio-economic advantage and disadvantage of the area. These are undertaken through indexes such as the Socio-Economic Index for Areas (SEIFA) which measures the general welfare of residents in particular areas based on small area Census Collection Districts (CCDs).

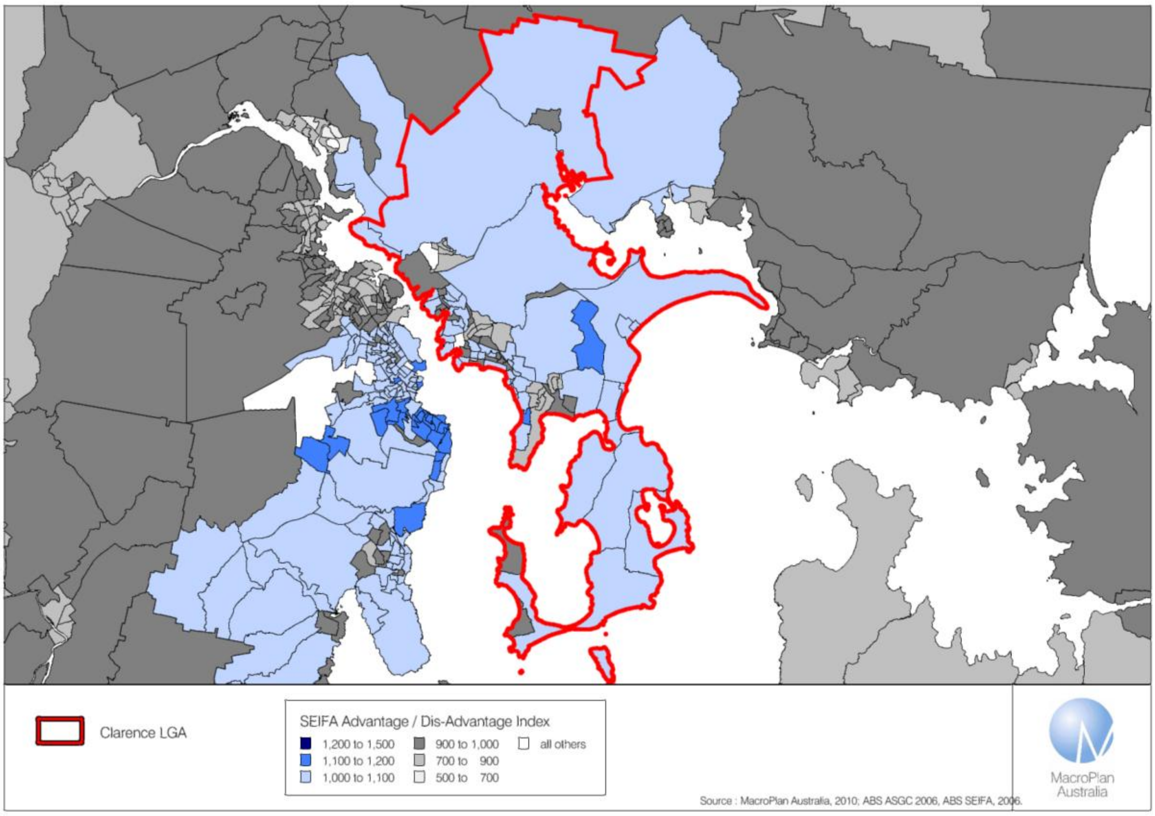
The map below is based on the Index of Relative Socio-economic Advantage and Disadvantage whereby higher values denote a socio-economic advantage and lower values denote a socio-economic disadvantage.

Key points to note from the SEIFA map are:

- Whilst coastal pockets on the western shore exhibit generally higher levels of wealth, Clarence is evolving with high socio-economic advantage clustered around coastal nodes within Clarence such as Bellerive, and rural communities.

- Lower socio economic areas have historically been concentrated around Howrah, Rokeby and industrial areas of Clarence.

Figure 5. **SEIFA Map**



Source: MacroPlan Australia

4 Clarence Retail Economic Analysis

From an overall economic viewpoint, retailing is a key component and a critical generator of economic activity for both the national economy and the Tasmanian state economy.

Every dollar spent at a retailer generates multiplier effects throughout the economy, including direct wages to employees, payments to suppliers, profits or surpluses to owners, and all of the flow-on benefits, which these payments in turn generate. Within TAS, retail trade typically represents approximately 20-25% of total state expenditure.

Clarence is currently well served for retailing, with the primary source of future demand for retailing based on growth in new residents.

Residents within the study area generally provide with the source of between 60% and 90% of retail sales, depending on the centres position within the retail hierarchy.

4.1 Methodology

Measuring retail demand is complex and limited by the availability of industry wide data. The retail projection model estimates additional retail floorspace required within the study area based on population growth and retail expenditure. Consideration of the competitiveness of the centres assists in identifying strategies to improve a centres performance and will form the basis of policy recommendations. This approach is summarised below.

Figure 6. **Need for retail methodology**

Source: MacroPlan Australia

4.2 Population Projections

The population levels within the surrounding Statistical Local Areas (SLA's) are detailed in the table below. These projections are sourced from the ABS and were prepared for the Commonwealth Department of Health and Ageing. These growth rates are then applied to the relevant study areas for Clarence to forecast population.

Table 6. ABS Statistical Local Area Population Projections

	2010	2011	2016	2021	2026
Estimated Resident Population					
Clarence (C)	52,317	52,685	54,439	56,014	57,296
Sorell (M) - Pt A	12,378	12,684	14,213	15,718	17,151
Sorell (M) - Pt B	1,062	1,062	1,061	1,059	1,050
Hobart (C) - Inner	552	567	642	719	798
Hobart (C) - Remainder	50,033	50,317	51,722	53,091	54,316
Southern Midlands (M)	5,942	5,960	6,028	6,084	6,098
Glamorgan/Spring Bay (M)	4,573	4,615	4,825	5,016	5,176
Brighton (M)	16,221	16,666	18,948	21,270	23,613
Total	65,757	66,431	69,713	72,791	75,497
Average Annual Change (No.)					
		2010-11	2011-16	2016-21	2021-26
Clarence (C)		368	351	315	256
Sorell (M) - Pt A		306	306	301	287
Sorell (M) - Pt B		0	0	0	-2
Hobart (C) - Inner		15	15	15	16
Hobart (C) - Remainder		284	281	274	245
Southern Midlands (M)		18	14	11	3
Glamorgan/Spring Bay (M)		42	42	38	32
Brighton (M)		445	456	464	469
Total		1,478	1,464	1,419	1,305
Average Annual Change (%)					
		2010-11	2011-16	2016-21	2021-26
Clarence (C)		0.7%	0.7%	0.6%	0.5%
Sorell (M) - Pt A		2.5%	2.3%	2.0%	1.8%
Sorell (M) - Pt B		0.0%	0.0%	0.0%	-0.2%
Hobart (C) - Inner		2.7%	2.5%	2.3%	2.1%
Hobart (C) - Remainder		0.6%	0.6%	0.5%	0.5%
Southern Midlands (M)		0.3%	0.2%	0.2%	0.0%
Glamorgan/Spring Bay (M)		0.9%	0.9%	0.8%	0.6%
Brighton (M)		2.7%	2.6%	2.3%	2.1%
Total		**1.0%**	**1.0%**	**0.9%**	**0.7%**

Source: ABS Department Health and Ageing, 2009.

The ABS forecast Clarence for minor population growth of around 300 new residents each year. Clarence will also be further supported by growth within Sorell to the east, which is also forecast for just under 300 new residents each year.

Based on these regional population forecasts, the population levels within the study area for Clarence are detailed in the table below. This eastern shore is generally well established, with the current population of the study area estimated at 85,300 residents. This includes 52,300 residents with Clarence, which accounts for approximately two thirds of the study area population.

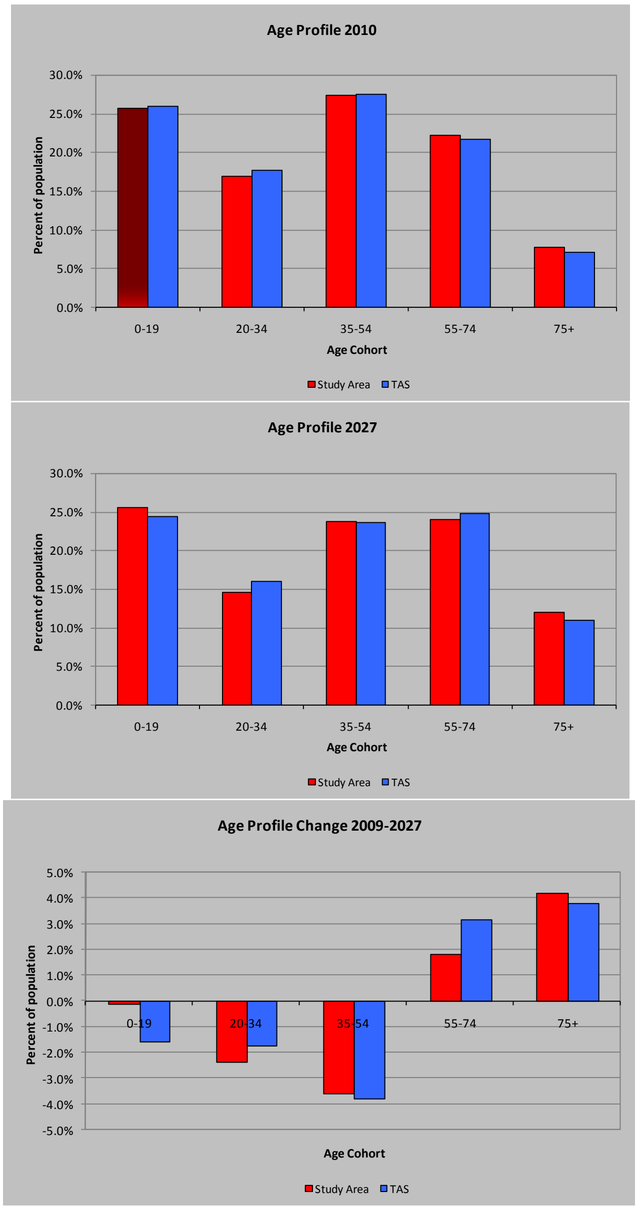
Table 7. Study Area Population 2010-2031

	2010	2011	2016	2021	2026	2031
Estimated Resident Population						
Clarence (c)	52,317	52,685	54,439	56,014	57,296	58,374
Clarence Balance	32,984	33,650	37,006	40,349	43,585	46,821
Study Area	**85,301**	**86,335**	**91,445**	**96,363**	**100,881**	**105,195**
Average Annual Change (No.)						
		2010-11	2011-16	2016-21	2021-26	2026-31
Clarence (c)		368	351	315	256	216
Clarence Balance		666	671	669	647	647
Study Area		**1,034**	**1,022**	**984**	**904**	**863**
Average Annual Change (%)						
		2010-11	2011-16	2016-21	2021-26	2026-31
Clarence (c)		0.7%	0.7%	0.6%	0.5%	0.4%
Clarence Balance		2.0%	1.9%	1.7%	1.6%	1.4%
Study Area		**1.2%**	**1.2%**	**1.1%**	**0.9%**	**0.8%**

Source: ABS Department Health and Ageing. MacroPlan Australia

The average age of study area residents is generally in line with the state average; however Clarence is forecast to increase its proportion of younger persons under 20 over time relative to the state.

Figure 7. **Age Cohort Breakdown**



Source: ABS Department Health and Ageing, MacroPlan Australia

4.3 Retail Expenditure Analysis

Retail Definition

Population is the primary driver for retail spending within the study area. The expenditure profile for residents has been developed according to retail spending categories from the Marketinfo database.

The expenditure profile for the trade area has been developed according to retail spending categories from the Marketinfo database. The expenditure profile of residents varies across Australia and is primarily determined by income. The authors have identified regional spending profiles within the study area based on the aggregation of MarketInfo small area retail estimates (i.e. built up from CCD level).

In the Strategy, retail floorspace and spending is divided into three product categories, namely Food, Non-Food and Services. These three categories are defined as follows:

Table 8. Retail Group and Retail Categories

RETAIL GROUP	RETAIL CATEGORIES
FOOD	
Food Retailing	spending at supermarkets and food specialties on take-home food, groceries and liquor
Food Catering	spending for catering purposes including at cafes, restaurants and take-away food outlets.
NON FOOD	
Non-food	includes all non-food based retail products including clothing, apparel, homewares, leisure goods and bulky merchandise
Services	includes spending on dry cleaning, hairdressers, video hire, clothing alterations etc.

Source: MacroPlan Australia

Bulky Goods / Showroom retailing refers to large format retail stores (typically greater than 1,000 m2), which generally sell merchandise in the following product categories:

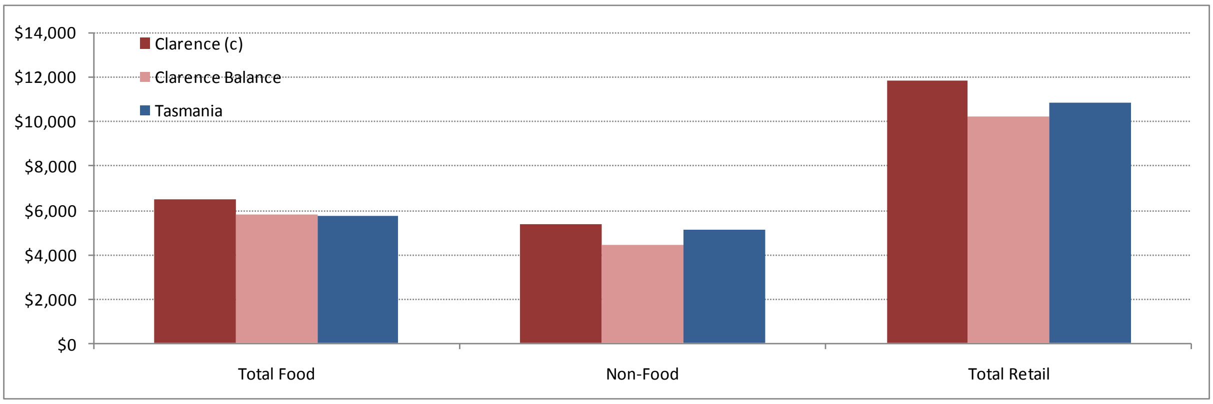
- Furniture and whitegoods.
- Hardware.
- Electrical goods, and
- Camping equipment.

Retail Expenditure Analysis

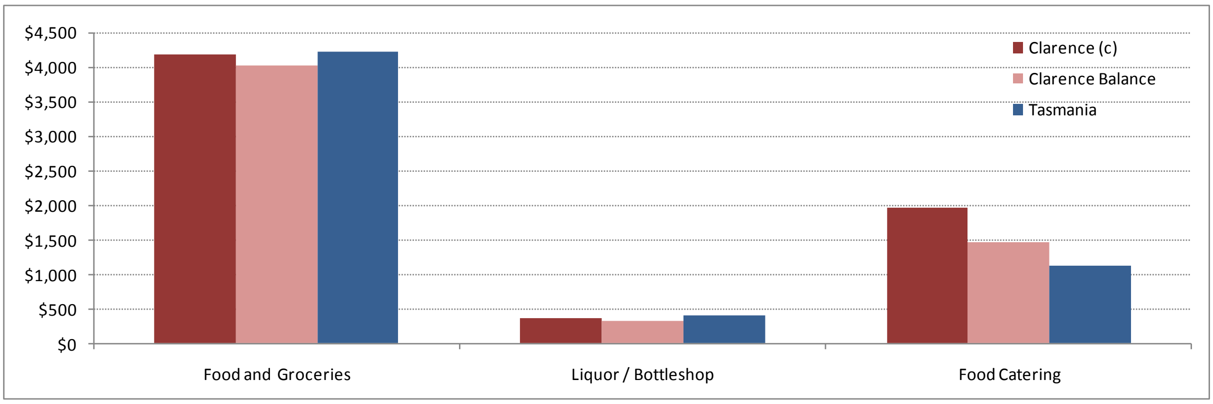
The figures below presents a comparison of the retail expenditure characteristics per capita of study area residents with Tasmanian averages. As detailed, the average per capita spend on retail goods in Clarence is above the Tasmanian average, which is particularly prevalent in discretionary catering and non-food retailing, this is likely driven by the proximity of these services within Clarence, in comparison to the average Tasmanian.

Figure 8. **Retail Expenditure Per Capita**

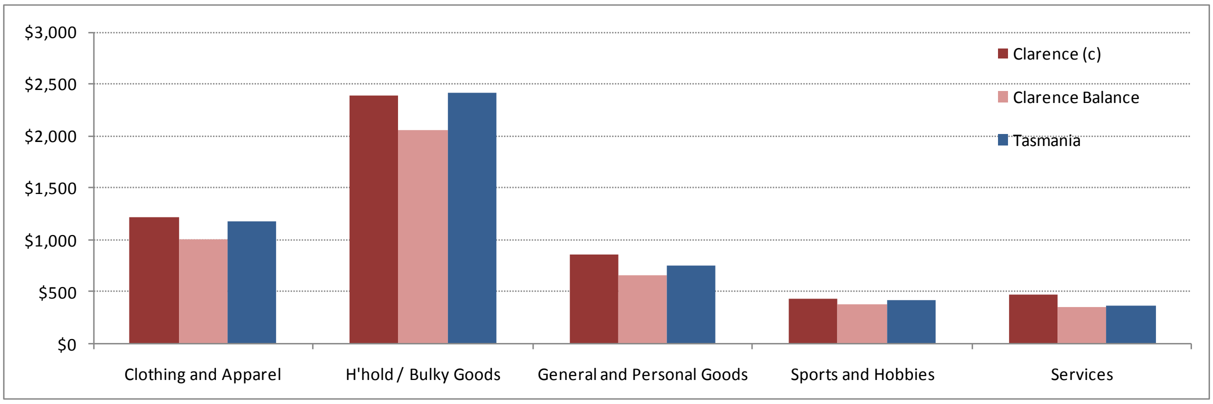
Total Retail



Food Retail



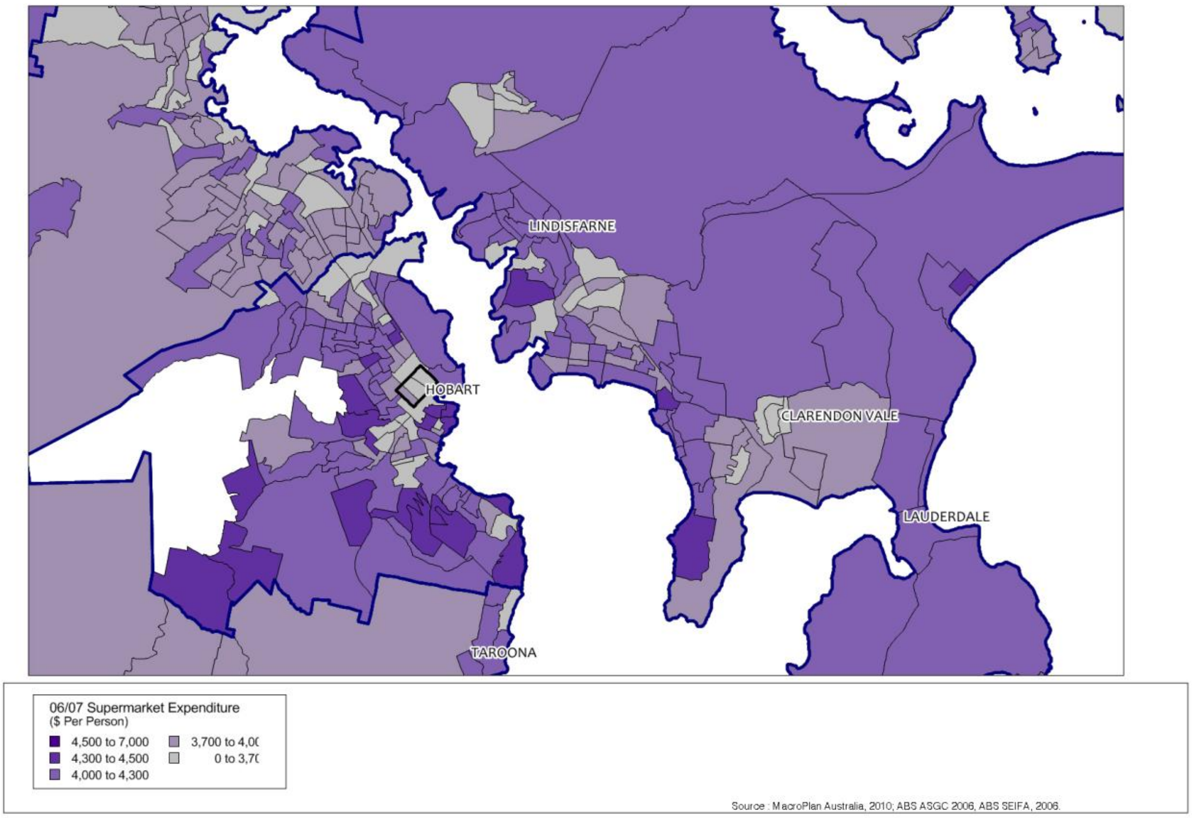
Non Food Retail



Source: MarketInfo, MacroPlan Australia

Whilst the average food spend across the study area is relatively consistent, the figure below details the supermarket and grocery spend across Clarence and the Greater Hobart area is varied. On the eastern shore, pockets surrounding Rokeby and Clarendon Vale display the weakest supermarket spend, with coastal areas having a stronger supermarket and grocery spend.

Figure 9. **Supermarket Expenditure Map**



Source: MarketInfo, MacroPlan Australia

Applying these per capita spending levels to the forecast population for the study area presented earlier, the table below summarises the total retail expenditure pool for the study area population from 2009, forecast until 2031.

With some increase in population expected within the study area, the expenditure pool within this sector is forecast to increase at an average of 2.4% growth per annum until 2031.

The retail expenditure pool generated by the study area is currently just under 1 billion, including $636.6 million generated within Clarence in 2010. By 2031, the total expenditure pool is expected to increase by over 50% to around 1.6 billion.

Table 9. Expenditure Pool by Trade Area

	Clarence (c)	Clarence Balance	Study Area
Retail Expenditure ($m)			
2009	623.6	336.1	959.7
2010	636.6	347.7	984.3
2011	649.8	359.6	1,009.4
2012	663.3	371.8	1,035.0
2013	676.9	384.2	1,061.1
2014	690.6	396.9	1,087.6
2015	704.7	410.0	1,114.7
2016	718.9	423.4	1,142.3
2021	792.5	494.6	1,287.1
2026	869.2	572.8	1,442.0
2031	950.2	660.2	1,610.4
Expenditure Growth ($m)			
2010-11	13.2	11.9	25.1
2011-16	82.3	75.7	158.0
2016-21	73.6	71.2	144.8
2021-26	76.7	78.2	154.8
2026-31	81.0	87.4	168.4
2010-31	313.6	312.4	626.0
Expenditure Growth (%)			
2010-11	2.1%	3.4%	2.6%
2011-16	2.0%	3.3%	2.5%
2016-21	2.0%	3.2%	2.4%
2021-26	1.9%	3.0%	2.3%
2026-31	1.8%	2.9%	2.2%
2010-31	1.9%	3.1%	2.4%

Source: MarketInfo, MacroPlan Australia

The table below distinguishes the study area expenditure pool by key commodity group. As detailed, all categories are expected for growth of around 2%, with household and bulky goods expected to maintain their strong growth in the future averaging 3.4% per annum until 2031.

Table 10. Expenditure Pool by Commodity Group

	Groceries and Liquor	Food Catering	Clothing and Apparel	H'hold / Bulky Goods	General and Personal Goods	Sports and Hobbies	Services
Retail Expenditure ($m)							
2009	381.6	150.3	96.1	194.6	34.4	66.5	36.2
2010	390.5	153.7	98.3	201.7	35.2	68.0	37.0
2011	399.5	157.1	100.5	208.9	36.0	69.5	37.9
2012	408.7	160.6	102.8	216.4	36.8	71.1	38.7
2013	418.0	164.1	105.1	224.1	37.6	72.7	39.6
2014	427.4	167.7	107.4	232.0	38.4	74.2	40.4
2015	437.0	171.3	109.8	240.2	39.3	75.9	41.3
2016	446.7	175.0	112.1	248.6	40.1	77.5	42.2
2021	497.0	194.0	124.5	294.3	44.6	85.9	46.8
2026	549.3	213.8	137.3	346.3	49.2	94.7	51.5
2031	604.7	234.6	150.8	405.8	54.1	103.9	56.5
Expenditure Growth ($m)							
2010-11	9.0	3.4	2.2	7.2	0.8	1.5	0.8
2011-16	56.2	21.4	13.8	46.9	5.0	9.5	5.1
2016-21	50.2	19.0	12.3	45.8	4.4	8.4	4.6
2021-26	52.3	19.7	12.8	51.9	4.6	8.8	4.7
2026-31	55.4	20.8	13.5	59.5	4.9	9.2	5.0
2010-31	214.2	80.9	52.5	204.1	18.9	35.9	19.5
Expenditure Growth (%)							
2010-11	2.3%	2.2%	2.3%	3.6%	2.3%	2.2%	2.2%
2011-16	2.3%	2.2%	2.2%	3.5%	2.2%	2.2%	2.2%
2016-21	2.2%	2.1%	2.1%	3.4%	2.1%	2.1%	2.1%
2021-26	2.0%	2.0%	2.0%	3.3%	2.0%	2.0%	2.0%
2026-31	1.9%	1.9%	1.9%	3.2%	1.9%	1.9%	1.9%
2010-31	2.1%	2.0%	2.1%	3.4%	2.1%	2.0%	2.0%

Source: MarketInfo, MacroPlan Australia

4.4 Supportable Retail Floorspace

The amount of floor space that can be sustained within Clarence is directly dependent on the forecast population from a holistic approach, factoring per capita floorspace ratios into the equation, and considers the minimum amount of floorspace that should be provided within Clarence based on the expected population growth.

Whilst some of the demand will be directed to the Hobart CBD through worker spend and occasional shopping trips, the majority of floorspace demand would be expected to be contained and developed from within the Clarence municipality , both though the enhancement of existing centres, and the development of new centres.

Within the study area, there is a requirement for a significant increase in total retail floorspace to be provided in Clarence, with demand for an additional 44,000sq.m.

Table 11. Floorspace Requirement by Tenancy Type

Study Area	2010	2011	2016	2021	2026	2031	Growth 2010-21	Growth 2010-31
Population	85,301	86,335	91,445	96,363	100,881	105,195	11,062	19,894
Food retailing								
Supermarkets	29,855	30,217	32,006	33,727	35,308	36,818	3,872	6,963
Food retail specialties	12,795	12,950	13,717	14,454	15,132	15,779	1,659	2,984
Food catering	21,325	21,584	22,861	24,091	25,220	26,299	2,766	4,974
Total food retailing	63,976	64,751	68,584	72,272	75,661	78,896	8,297	14,921
Non-Food retailing								
Dept. stores / DDS	25,590	25,900	27,434	28,909	30,264	31,559	3,319	5,968
Non-food specialties	29,855	30,217	32,006	33,727	35,308	36,818	3,872	6,963
Bulky goods	55,446	56,118	59,439	62,636	65,572	68,377	7,190	12,931
Total non-food	110,891	112,235	118,879	125,272	131,145	136,754	14,381	25,862
Retail services								
Retail services	12,795	12,950	13,717	14,454	15,132	15,779	1,659	2,984
Total retail floorspace	187,662	189,937	201,179	211,999	221,937	231,429	24,337	43,767

Source: MacroPlan Australia (2010).

5 Specific Centre Review

5.1 Centre competitiveness methodology

The authors have assessed the competitiveness of key activity centres in Clarence based on a range of economic, social and environmental indicators that help assess their performance as an activity centre, and assists in guiding recommendations for the future development of these centres.

The indicators are broadly based on strategic policy directions in the role and function of an activity centre detailed in the following table.

Table 12. Competitiveness Indicators

	Indicator	Description	Statistical measurement
Economic	Economic Activity	Encourage economic activity, business synergies and economies of agglomeration.	Number of jobs in centre and job diversity.
	Economic Profile	Should provide for a strong residential catchment with review of growth potential. .	Number of residents within a centre catchment.
	Higher order commercial offer	Should provide for a mix of employment including commercial floorspace.	Number of commercial office jobs
	Anchors and retail network	Should provide anchors (retail and non-retail) to support economic development	Number, size and type of anchors as well as total retail floorspace.
Social	Accessibility	Improving accessibility within and to the centre through walking, cycling and public transport to services and facilities.	Both public and private accessibility considerations.
	Community Facilities	Should provide a range of community and entertainment facilities.	Number and form of community facilities.
Environmental	Optimise public transport networks	Should integrate public transport into everyday life. Public transport networks should generate activity and reduce environmental impacts	Journey to work profile
	Reduce private vehicle trips	Reduce the number of private vehicle (car) trips to and from activity centres.	Journey to work profile

Source: MacroPlan Australia (2010).

In the full assessment, activity centres are awarded a score up to 5 against 8 performance indicators resulting in a total possible score of 40. Applying this approach, a score of 15 is therefore a critical threshold. Below this, the future success of the centre without significant public or private investment is questionable. The following table provides an interpretation of scores.

Table 13. Activity Centre assessment criteria

	Characteristic	Total Score
Exemplar	The activity centre is a leading example with a diverse range of key competitive advantages and characteristics that together achieve success in the market. These advantages should continue to be emphasised and enhanced.	27 – 40
Successful	The activity centre performs well in a broad range of key indicators. While its current performance is good, there are a number of areas that can be improved. These can generally be readily rectified and improved through minor amendments and adjustments.	23 – 27
Positive	The activity centre is performing positively but has a range of areas of improvement. The centre has many key advantages that can facilitate further development. While its development is constrained by a range of factors, the centre can improve its performance through strategic amendments and adjustments.	20 – 23
Marginal	The activity centre contains a range of positive and negative characteristics with overall performance being marginal. Development should focus on limiting the effects of its negative characteristics and aim to further nurture its positive characteristics.	15- 20
Testing	The activity centre contains few key competitive advantages. Significant investment and strategies are required to transform the activity centre.	10 – 15
Challenging	The activity centre contains little to no key competitive advantages. This will seriously inhibit its success in the market without significant public or private intervention.	5 – 10
Almost impossible	The activity centre contains no key competitive advantages. This will prevent its success in the market. Its designation as an activity centre should be reconsidered.	0 – 5

Source: MacroPlan Australia (2010).

Consideration of constraints

The authors acknowledge that activity centres may not necessarily be able to accommodate all of the retail floorspace growth required due to land constraints, planning intentions and other market factors (i.e. financing difficulties, developer attraction, etc.). As a result estimate of retail floorspace accommodated within each activity centre will need to consider these constraints to ascertain a realistic level of retail floorspace that could be delivered.

Specific Centre competitiveness

5.2 Rosny Park / Eastlands

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

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

The competitiveness of Rosny Park Activity Centre to identify its strengths and weaknesses in relation to its performance as a 'Principal Activity Centre' (PAC).

The assessment resulted in a total score for Rosny Park Activity Centre of 26 out of 40 with all bottom lines (economic, social, environmental) performing moderately above average. This places Rosny Park Activity Centre within the 'Successful' assessment category – above the critical 15 point threshold. This indicates that the centre is currently performing well as a Principal Activity Centre supporting Hobart but should be encouraged to improve in a number of areas such as community and entertainment facilities.

Table 14. Rosny Activity Centre competitiveness

Indicators	Score	Comments
Economic indicator		
Employment profile	3.5	58% white collar employment
Economic activity - Population catchment	4.5	80,000 residents in Main Trade Area (regional catchment).
Higher order commercial offer	3.0	Regional commercial, government and health employment.
Anchors and retail network	4.0	Anchored by Eastlands Shopping Centre, with total retail of 10,075sqm but has 2,375sqm of Catering (Cafés and Restaurant).
Social indicator		
Accessibility	2	The bus interchange limits accessibility within the centre and is not integrated with other uses.
Community Facilities	3.5	Good community facilities including health, education and some entertainment offer. However, given the position within the retail hierarchy, there is potential for increases in community facilities, particularly entertainment offer.
Environmental indicator		
Optimise public transport networks	3.0	15% of journey to work trips in are via public transport
Reduce private vehicle trips	2.5	85% of journey to work trips by private vehicle.

Triple Bottom Line (totals)		
Economic	15.0	Performs well with high economic activity and high levels of commercial and government services. However, its retail provision is limited.
Social	5.5	Accessibility within and to the centre is good with the main issue being the relationship between the centre, the bus interchange and traffic access. There is limited residential density within the centre.
Environmental	5.5	Use of public transport and private vehicles is relatively in line with other TOD-oriented Major Activity Centres.
Activity Centre Rating	26	**Successful:** The Activity Centre contains a range of positive characteristics. Being the largest asset within Clarence, development should focus on encouraging employment and community uses and aim to further nurture its positive characteristics.

Source: MacroPlan Australia (2010).

As highlighted in the previous table, Rosny Activity Centre performs successfully as a Principal Activity Centre (PAC). Its key strength is in the high number of jobs within its boundary with the centre having highest number of jobs compared to the other Activity Centres. This is further enhanced given the close proximity of Hobart CBD. However, the centre is not maximising its community and commercial potential for a PAC,

It should be noted that whilst its performance is rated ‘Successful’, it does not necessarily mean that its overall performance as a PAC is significantly lacking). However from a retail perspective, there is an increasing competitive market given the development of the Cambridge Park Bulky Goods Centre along the Tasman Highway drawing much of the non-food expenditure pool out of the Activity Centre.

The key tenancy market gap has been identified as a major Department Store. Rosny should be considered as the only recommended location If Clarence is able to attract a major Department Store tenant.

5.3 Howrah / Shoreline

The assessment of the competitiveness of the Howrah Activity Centre is based on policy objectives. MacroPlan's assessment resulted in a total score for Howrah Activity Centre of 18 out of 40 with all bottom lines (economic, social, environmental) performing marginal to averages. This indicates that the centre can improve in a number of areas.

Table 15. Howrah Activity Centre competitiveness

Indicators	Score	Comments
Economic indicator		
Employment profile	2.5	53% white collar employment
Economic activity - Population catchment	3.0	25,000 residents in Main Trade Area (very strong NAC catchment).
Higher order commercial offer	2.0	Local retail, commercial and government employment.
Anchors and retail network	3.5	Anchored by a well performing Woolworths supermarket with a strong residential catchment.
Social indicator		
Accessibility	2.0	Strong road connections, with adequate car parking facilities.
Community Facilities	2.0	Basic community facilities with some night time activity, including the Howrah recreational facility.
Environmental indicator		
Optimise public transport networks	1.0	12% of journey to work trips in are via public transport
Reduce private vehicle trips	2.0	88% of journey to work trips by private vehicle.
Triple Bottom Line (totals)		
Economic	11.0	Has well performing convenience retail provision with high critical mass of population.
Social	4.0	Low performing social indicator, reflecting its position as a NAC and its proximity to Rosny.
Environmental	3.0	Use of public transport and private vehicles is in line with other Neighbourhood Activity Centres.
Activity Centre Rating	18	**Marginal:** The activity centre is performing positively but has a range of areas of improvement. The centre has many key advantages that can facilitate further development as a NAC. However, its development is constrained by a range of factors, including available land. In particular, the supermarket within Shoreline is trading very strongly and highlights the potential for a third NAC in the southern Clarence area.

The provision of only one full line supermarket for this catchment results in a high level of expenditure escaping to other retail facilities beyond Howrah, and reinforces the potential for a third supermarket based centres within this general area.

5.4 Lindisfarne

The assessment resulted in a total score for Lindisfarne Activity Centre of 21 out of 40 with all bottom lines (economic, social, environmental) performing moderately above average. This places Lindisfarne Activity Centre within the 'positive' assessment category – above the critical 15 point threshold. This indicates that the centre is currently performing in line with or slightly above other Neighbourhood Activity Centres.

Table 16. Lindisfarne Activity Centre competitiveness

Indicators	Score	Comments
Economic indicator		
Economic activity - Number of jobs	3.5	57% white collar employment
Economic activity - Population catchment	3.0	12,000 residents in Main Trade Area (local catchment).
Higher order commercial offer	2.0	Local retail and commercial employment.
Anchors and retail network	4.0	Anchored by Woolworths supermarket with limited supporting specialty offer.
Social indicator		
Accessibility	2.0	Primarily car based visitation.
Community Facilities	2.0	In line with other Neighbourhood Activity Centres
Environmental indicator		
Optimise public transport networks	2.0	14% of journey to work trips in are via public transport
Reduce private vehicle trips	2.5	86% of journey to work trips by private vehicle.
Triple Bottom Line (totals)		
Economic	12.5	Performs well with high economic activity and good retail provision.
Social	4.0	Amenity can be improve, which is currently identified within Council plans.
Environmental	4.5	Use of public transport and private vehicles is relatively in line with other Neighbourhood Activity Centres.
Activity Centre Rating	21	**MARGINAL / POSITIVE:** The activity centre is performing marginally but has a range of key advantages that can facilitate further development as a NAC. Its development should focus on continued market penetration into the local catchment.

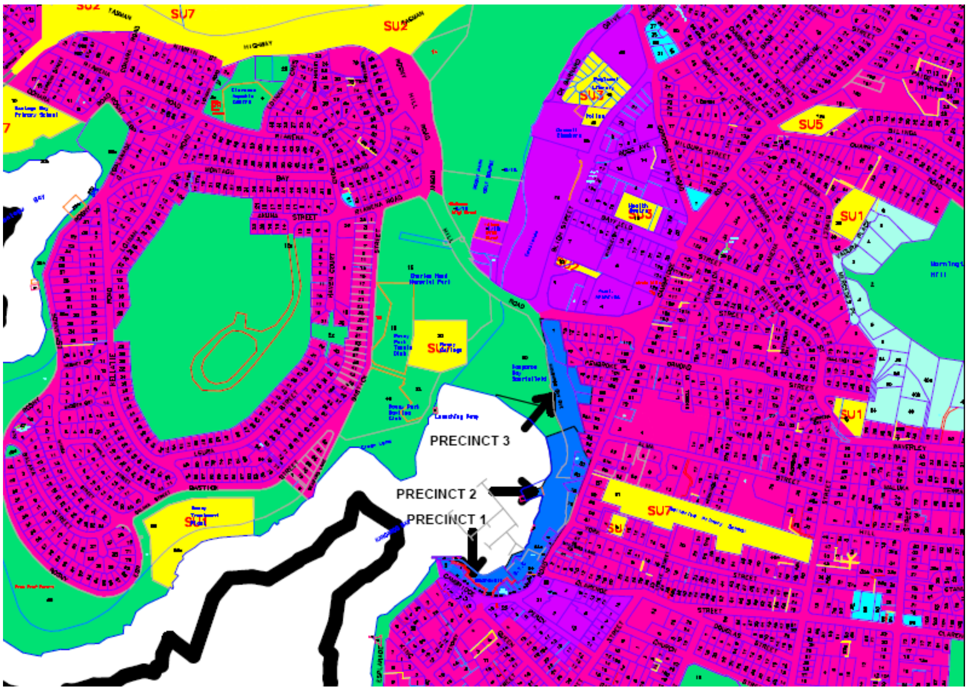
Source: MacroPlan Australia (2010).

As highlighted in the previous table, Lindisfarne Activity Centre currently performs in line with other NACs. It has a relatively solid economic base with a good mix of retail.

5.5 Bellerive

Bellerive Village retains a village type character with a limited retail offer. Limited development has taken place with the village over the previous 5 or so years.

A significant upgrade to the area is currently underway with a walkway linking the area to Rosny Park.

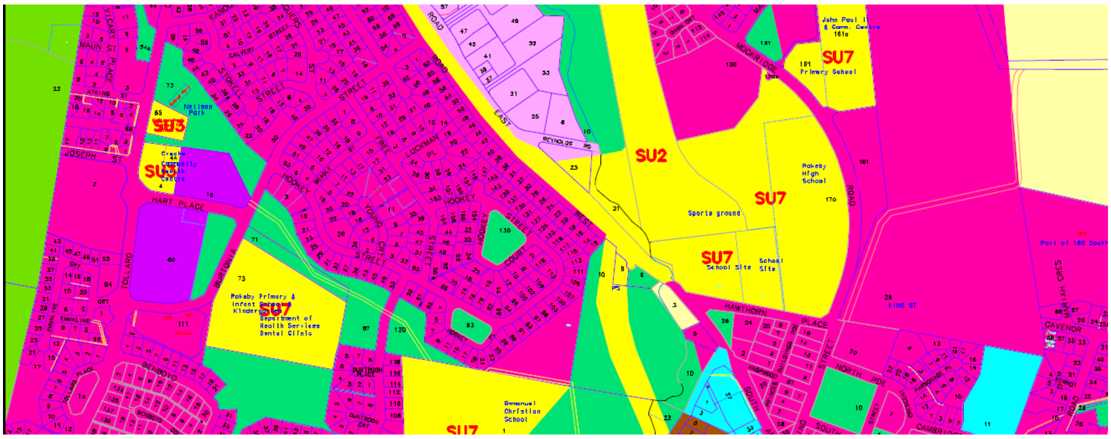


5.6 Rokeby

Rokeby is located in the Southern area of the municipality and is bisected by the South Arm Highway. It contains a small number of retail and commercial outlets the majority of which are along the highway in the local business zone.

There is a small area of land zoned commercial as shown in the following image, however this is not considered to be ideally suited for the following reasons:

- Poorly located in relation to a major transport route – access to the Commercial zone is via Burtonia Road, off Rokeby Road and through an established residential area.
- The land is not centrally located – being on the outskirts of the residential area and within 100 metres of the Landscape Skyline Conservation Zone.
- The area is not of a sufficient size to provide for a supermarket complex with an anchor tenant, specialty stores, car parking etc and it is very unlikely that this land would be developed for retail purposes without an anchor tenant expressing an interest in moving to the site.
- The land has been zoned Commercial or similar for some decades and no activity centre has been developed.



Recommendation

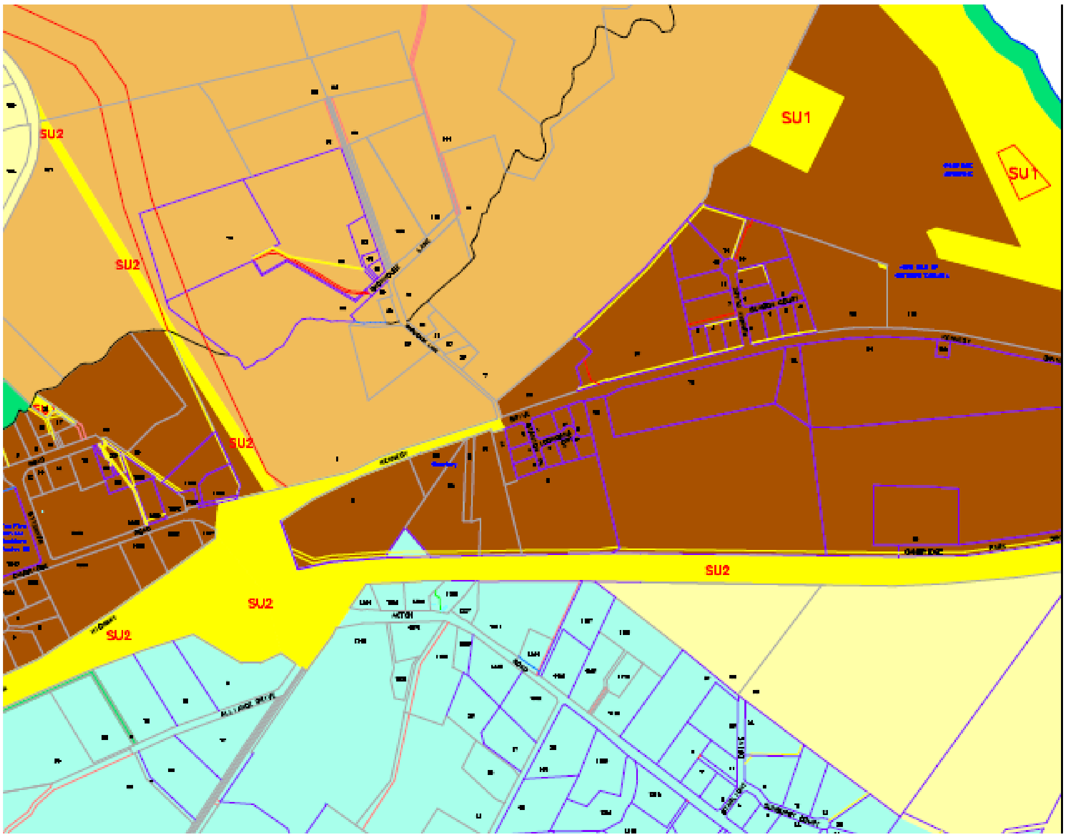
Rezone the Commercial zoned area of Rokeby to Local Business and or residential and

Provide for the rezoning of land to Commercial within the southern area of Clarence and that this area be located adjacent to a major transport route.

5.7 Cambridge Park

The area of Cambridge Park as shown in the following image has developed relatively rapidly over the past 3 – 4 years, mainly via the construction of the Big Box Retail Homemakers Centre, containing Harvey Norman, K&D Warehouse and other large retailers. Subsequently a number of businesses have also established in the area. The businesses consist of administrative headquarters, business parks and other commercial type activities.

The area is zoned Industry and it is not considered that the zoning most appropriately reflects the type of use and development which has and or is likely to establish in the area. It is considered that the following types of uses are more likely and more appropriate to occur in this 'precinct' - warehouses, distribution centres, administrative headquarters, bulky goods retail outs (this is not intended to be a representative list). Although some of these uses could be provided for within the current Industry Zoning, it is considered that this would negatively impact upon the overall integrity of the Industry Zone. It is considered that more appropriate zoning controls either via the introduction of a new zone or precinct overlay be included within the scheme.




B31
A3
Richmond Rd
Kennedy Dr
Cambridge Rd
Acton Rd
C330
Tasman Hwy
Holyman Ave
Pittwater Rd
Cambridge TAS, Australia
Image © 2010 DigitalGlobe
© 2010 MapData Sciences Pty Ltd, PSMA
Imagery Date: Jun 2, 2008
42°50'05.90" S 147°28'23.43" E elev 11 m
Eye alt 5.01 km
Google

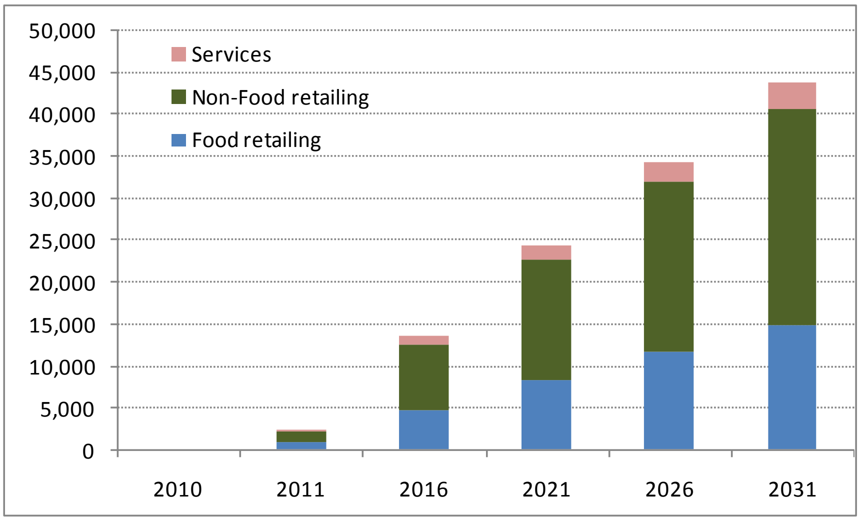
That a new zone or precinct overlay be included within the scheme and that this be a semi Commercial Zone with provision for light industry.

5.8 Retail Opportunities

The modelling and analysis of growth in retail expenditure based on the assessments outlined above confirm the need for some increases in the retail floorspace requirement. In view of the limited increase in population within Clarence, a reasonable timeframe for analysis is between 10 – 15 years, therefore forecast floorspace requirement is analysed until 2031.

This analysis assumes that existing levels of expenditure injection and escape expenditure are maintained, reflecting the current strong retail offer in Clarence and proximity of residents to Hobart.

Table 17. Additional Floorspace Demand



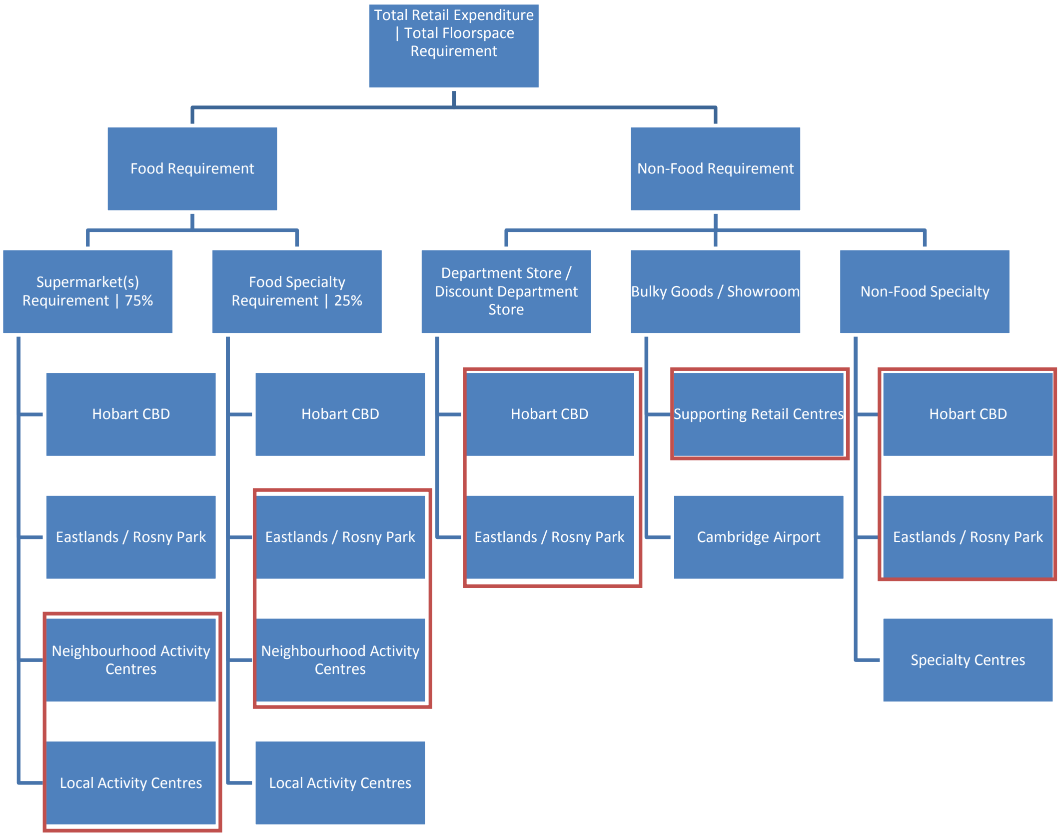
Source: MacroPlan Australia (2010)

The floorspace requirement has been based on an average sales turnover density for established retailers within the relevant retail categories. Based on the analysis, the additional floorspace requirement to 2021 is forecast to be just under 25,000 sq.m. This would include supermarket and non-food retail.

Floorspace Allocation

In order to understand the ideal locations and form for future retail floorspace to be distributed across Clarence, a floorspace allocation methodology has been undertaken.

Table 18. Floorspace Allocation Methodology



Source: MacroPlan Australia 2010.

As identified in the floorspace allocation methodology above, there are a range of forms with which the floorspace requirement may be allocated, including:

- Between food and non-food
- Between centre type
- New centre development verse expanded existing centre.

Food And Grocery

The majority of food requirement is directed towards supermarkets, accounting for approximately 75% of food and grocery requirements. The remaining 25% should be directed towards food specialties. In particular, neighbourhood and local activity centres should be the focus for increased food retailing, with higher order centres currently providing an adequate level of food retailing.

In the short term, there is a requirement for additional food retailing, likely to support the development of a new Neighbourhood Activity Centre.

Long terms requirements for food retailing are unlikely to warrant the development of additional Neighbourhood Activity Nodes, however local strip shopping and convenience facilities are encouraged within growing areas to provide for top up shopping needs.

Non-Food

The non-food requirement is not in itself significant enough to encourage or sustain the development of new higher order retail centres. Therefore, additional demand for non-food retailing should be directed towards the continued vitalisation within existing activity centres, and supporting any potential new Neighbourhood Activity Centres.

It is recommended that the primary aim of the non-food requirement should be the injection of activity within existing centres. This is particularly relevant for core activity centres within Clarence to maintain competitiveness given the potential of airport lands to further establish their non-food offer, including potentially ‘factory outlet’ retailing.

Importantly, the identification of additional non-food retailing should focus on the provision of facilities that provide a wider net community benefit (i.e. entertainment, community facilities and services).

5.9 Market Gaps and Opportunities

This review has detailed population and retail trends within Clarence, confirming the need for a third Neighbourhood Activity Centre to support the existing activity centre hierarchy.

A number of factors must be considered in understanding where a new activity centre and retail facilities should be located, including:

- Population capacity.
- Population growth and development trends.
- Existing shopping and travel patterns.
- Ability to provide mixed use outcomes, including social and community uses.
- Implications on the existing activity centre framework.
- Provide a ‘distributed’ system of retail centres.
- Supported by the existing community, and will also support the growth within the catchment.

- The role and function of existing centres and if it is an appropriate extension to the existing retail hierarchy.

Based on the previous review, it is clear Southern Clarence would provide the most appropriate location to deliver these facilities, supported by the existing Shoreline Shopping Centre trading at well above average benchmarks and the potential for additional population growth in the area. The next section reviews the Southern Clarence area in more detail to provide recommendations for activity centre development.

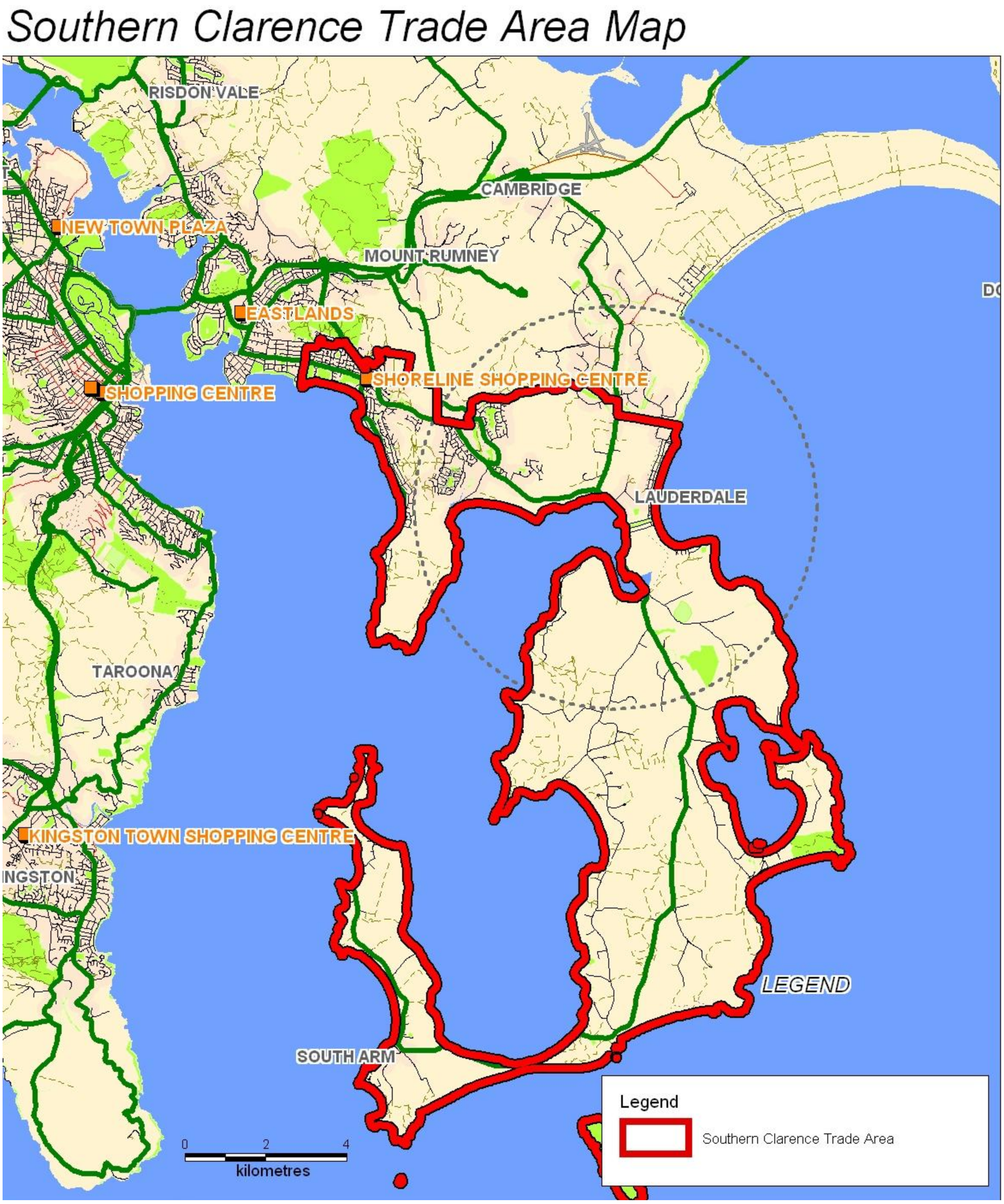
5.10 Southern Clarence Neighbourhood Activity Centre (NAC)

Whilst the focus for this study is placed on future retail floorspace requirements serving Clarence, the strong performance of supermarkets within southern Clarence, including Shoreline Shopping Centre, requires further attention on the ability of these existing supermarkets to adequately serve the market.

Shoreline Shopping Centre, particularly the supermarket within the centre, is trading at well above average levels being the only major supermarket south of Rosny, and is not likely to adequately serve the southern Clarence market into the future.

It has been previously identified through the Resource Planning and Development Commission (CLARENCE PLANNING SCHEME, AMENDMENT A-2008/25 & PERMIT APPLICATION D-2008/97, LAUDERDALE SHOPPING CENTRE) that there is a requirement for additional supermarket facilities.

Figure 10. **Southern Clarence Trade Area**



Source: MacroPlan Australia 2010

To understand the requirements of the Southern Clarence area for retailing, a discrete trade area has been defined that takes into account the role and function and natural catchment of the southern area and therefore ensures the economic viability of the retail hierarchy.

The following table details the potential size and scale of retail that is supported from a sustainability perspective in the southern Clarence area.

Table 19. Southern Clarence Floorspace Requirments

Southern Clarence	2010	2011	2016
Population	31,535	31,917	33,806
Food retailing			
Supermarkets	11,037	11,171	11,832
Total food retailing	23,651	23,938	25,355
Non-Food retailing			
Total non-food	40,995	41,492	43,948
Retail services	4,730	4,788	5,071
Total retail floorspace	69,376	70,217	74,373
Neighbourhood / Local Centre Requirement			
Market Share	27%		
Total Neighbourhood Centre Requirement	18,732	18,959	20,081
Neighbourhood Centre Requirement			
Market Share	20%		
Total Neighbourhood Centre Requirement	13,875	14,043	14,875
Existing Neighbourhood Centre Provision			
Shoreline Shopping Centre	4,165		
Neighbourhood Centre Market Gap			
Over / Under Supply	-9,710	-10,551	-14,707

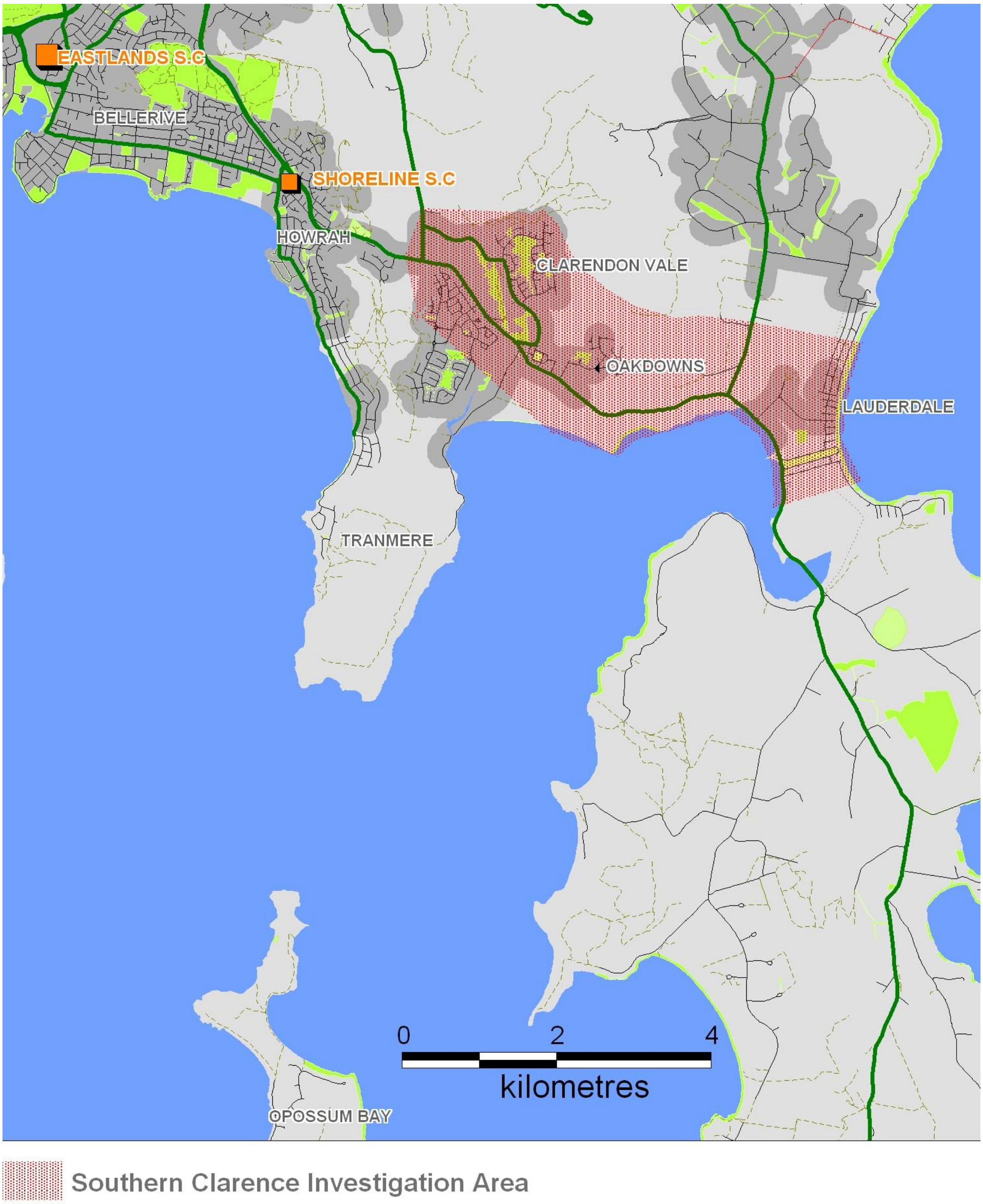
Source: MacroPlan Australia 2010

Based on this assessment, the Southern Clarence area can support additional retail floorspace, and in particular Neighbourhood Centre floorspace. The critical mass in undersupply of Neighbourhood Centre floorspace would allow for a new neighbourhood retail centre to be developed in the Southern Clarence area, this driven in part by the currently very strong trading performance of the Shoreline shopping centre.

This will assist in achieving the wider economic objectives for the southern area by revitalising the area through supporting a diverse retail and community centre that is sustainable by the local community and at the same time ensures the economic viability of other centres in the retail hierarchy.

Having identified a need for a new neighbourhood centre in Southern Clarence, the next step is to identify a potential location for the centre. The figure below details southern Clarence and identifies a key investigation area for the development of this new Neighbourhood Activity Centre.

Figure 11. **Southern Clarence Investigation Area**



Source: MacroPlan Australia 2010

To understand the drivers behind this submarket, key Indicators for the investigation area include:

- Existing built up urban areas are located within Rokeby, Oakdowns, Clarendon Vale, Lauderdale and Acton Park.
- South Arm, including rural areas south of Lauderdale has a current population of around 4,000 residents.
- From 2001 to 2006, new residential development generally occurred within Oakdowns and Howrah Heights.
- The approved and proposed subdivisions are generally within the urban growth boundary and would be served by the existing Shoreline Shopping Centre and a potential new centre.
- Take up of existing residential parcels is not significant, with generally low value rural land that has been subdivided.
- Associated mix of social and community uses should also be considered as integral into the development of activity centres to take advantage of the catchment that food attracts.
- Lack of extensive retail offering south of Shoreline at Howrah, with an emphasis on Seven Mile Beach, Lauderdale, South Arm and further afield.

The previous section outlined a range of key indicators for appropriate activity centre development. Central to this is the ability to provide a genuine mixed use centre with a range of community and social uses. Generally activity centre components consist of the following attributes to maximise economic and community benefits.

Figure 12. **Critical Mixed Use Components**

Source: MacroPlan Australia

Summary

There is no exact science as to where the centre should be located, however a number of key principles should guide the location of a new centre, such as:

- Ability to provide mixed use outcomes, including social and community uses.
- Population growth and development trends.
- Existing shopping and travel patterns.

- Implications on the existing activity centre framework.
- Desire of a Commercial developer to locate in a particular area
- Availability of land
- Patterns of demand
- Market demand.

From a Triple Bottom Line (TBL – Economic, Social, and Environmental) point of view, the potential new activity centre is best placed within the general Lauderdale area to build upon existing community and social infrastructure and established travel patterns.

As a Shopping Centre is only discretionary in the Commercial Zone; an area of land would require rezoning or the commercial zoned land at Rokeby be developed, for an activity centre to be established.

The existing commercially zoned land at Rokeby is considered inappropriate for the development of a new activity centre as:

- it is located immediately within an existing residential area;
- Is on the outskirts of the residential area;
- has limited access being located on a minor road;
- is poorly serviced by any existing public transport routes and likely to continue; and
- No commercial interest has been shown in its development for its zoned purpose, although having been zoned Commercial for some decades.

Having a land inappropriately zoned is not considered to make the best use of the City's available assets and as such it is considered that the land should be rezoned from commercial to residential.

This land is the last remaining undeveloped commercially zoned land within the city and as such removing it would extinguish the opportunity for a new activity centre to be developed in Southern Clarence. It is therefore recommended that a new parcel of land be rezoned to Commercial in Southern Clarence.

There are three potential areas (as shown in the figure below) in which this new Activity Centre could be located these are

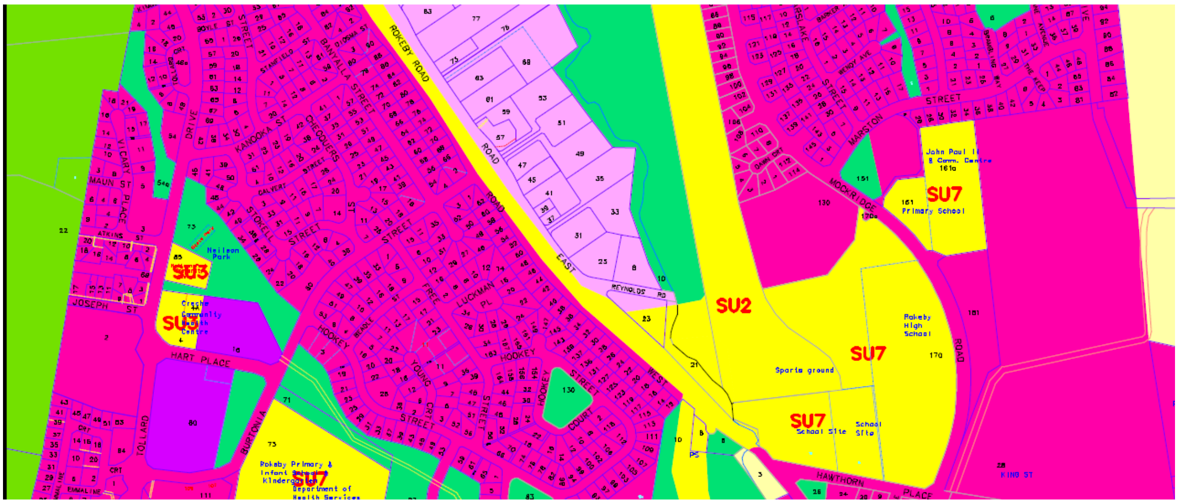
1. Rokeby;
2. Oakdowns
3. Lauderdale

Rokeby

Rokeby is located close enough to the existing Neighbourhood Activity Centre at Howrah,

such that a new Activity Centre would significantly impact upon its trade and the existing retail hierarchy.

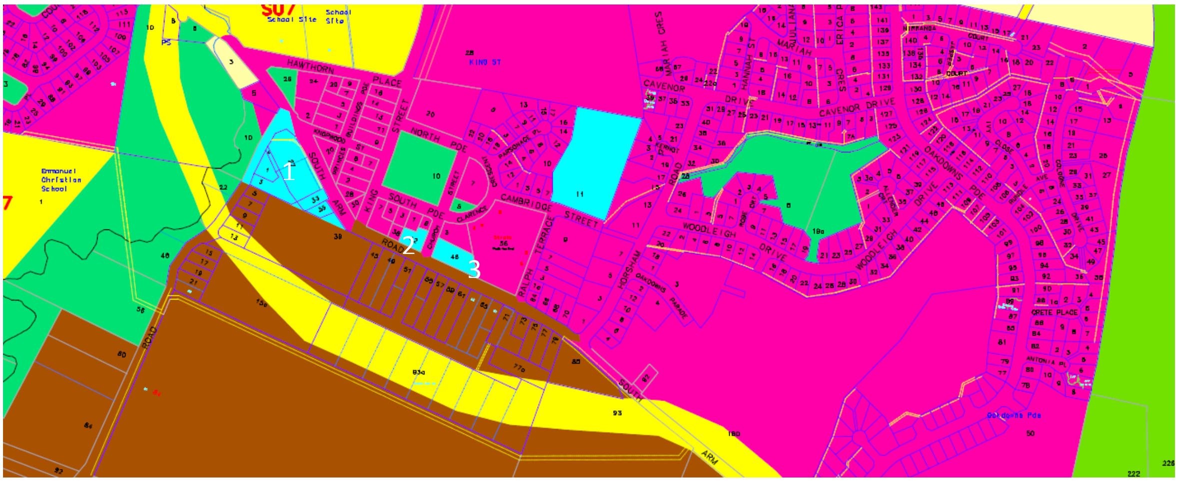
There is little or no available land of sufficicient size with frontage and or access to Rokeby Road for the development of a Neighbourhood Activity Centre' the land to the west zoned residential has all been developed as has land to the east zoned Low density Residential. The only parcels of sufficient size are currently either zoned Special Use; for a future road and school or Recreation. This can be seen in the following image.



Source: Clarce City Council

Oakdowns/Rokeby

There are three parcels of land along South Arm Road in Oakdowns/Rokeby which are



zoned Local Business and contains

- service station,
- fast food shops,
- IGA Supermarket,
- Laundry,
- Chemist,
- Vinnies,
- Butcher and
- Pharmacy amongst others.

The three Local Business Zones as shown in the figure above have the approximate following areas.

1- 1.2ha

2 1400m2

3 2700m2

Areas 2 and 3 are not considered of sufficient size to support a new Activity Centre and are somewhat disjointed.

Area 1 has good frontage to a major transport route, is on an intersection, and is possibly of adequate size to provide for a new Neighbourhood Activity Centre. The significant drawback for the site is that it is comprised of seven separate titles all of which have been developed to differing degrees. The largest of these titles is approximately 2500m2 which is not considered large enough for major supermarket to establish. Although it would be possible for titles to be combined and existing buildings demolished to provide for the establishment of a new Neighbourhood Activity Centre, it is more likely that even if the site was rezoned to Commercial it would remain as a Local Activity Centre. It is also important to note that although a Shopping Centre is prohibited in the Local Business Zone a shop is not, a supermarket such as Coles or Woolworths could have established in the locale forthe entire time that the land has been zoned Local Business, this has not occurred and this is another reason for concluding that a major supermarket is unlikely to establish in this locale.

A new Neighbourhood Activity Centre in this locale is likely to have a greater impact upon the trade of the Shoreline Shopping Centre to the northwest in Howrah than if one established further to the south.

To the south of this locale on the eastern and western sides of South Arm Road is residential land and the Police Training Academy respectively. It is considered most appropriate that these areas continue to be developed for their zoned purposes as access off South Arm Highway in this area would be difficult to achieve and there are no existing intersections available to provide for access.

Lauderdale

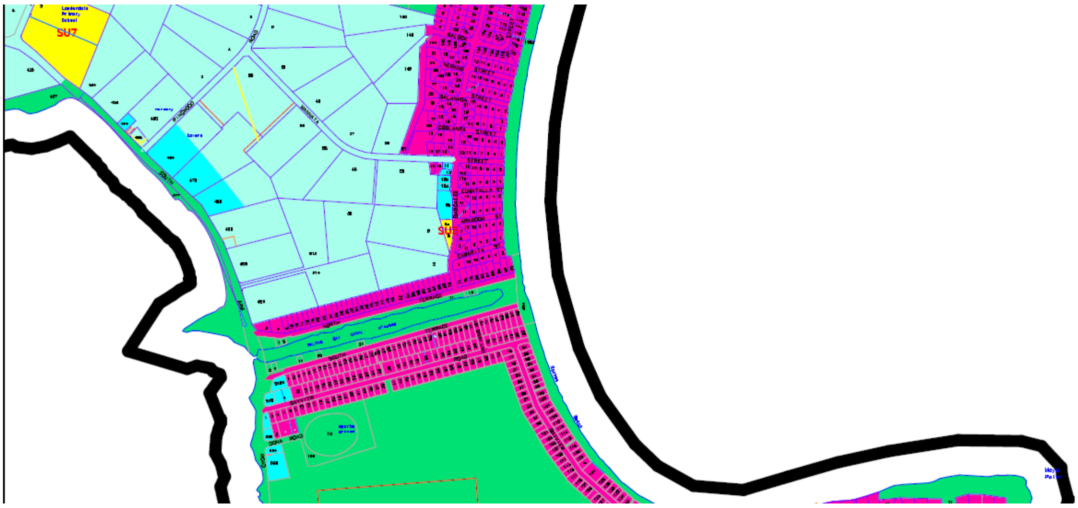
There are a five separate parcels of land with frontage to South Arm Highway in Lauderdale which contain amongst other things the following retail outlets:

- Surf shop;
- Service station;
- Tavern;
- Doctors Surgery
- Garden Centre and landscape supplies;
- Cafe;
- Butcher shop
- Bakery
- Real Estate Agent.

The significant advantage of Lauderdale over the Rokeby/Oakdowns area is that there are a number of large, (greater than 2ha) relatively undeveloped parcels of land which have frontage to the South Arm Highway and or are located on an existing intersection. The area will be serviced with sewer and water in the near future. The other advantage of lauderdale over Oakdowns/Rokeby is that it is further from the existing Neighbourhood Activty Centre of Shoreline at Howrah, meaning that a Neighbourhood Activity Centre at Lauderdale would draw less retail trade from the existing centre.

Lauderdale and Rokeby/Oakdowns are both Local Activity centres and neither can be considered to be higher up the retail hiercarchy than one another, each provides a similar level of retail offering.

It is considered more likely that a major supermarket would establish at Lauderdale as opposed to Oakdowns/Rokeby.



It should be noted that the development of a Neighbourhood Activity Centre in either location would not limit the potential for an activity centre to be located within the alternative area to serve convenience needs.

It is recommended that a more detailed Structure Plan for Lauderdale area be undertaken and that as part of this planning process an area of land be considered for rezoning to commercial to provide for future retail.

6 Clarence Recommended Retail Scheme

The assessment of the market gap and need for retail floorspace has confirmed a requirement to deliver some increases in Neighbourhood Activity Centre floorspace, primarily in the food category. The Neighbourhood Activity Centre should encourage more diverse land uses with social and community land uses.

ECONOMIC PRINCIPLES FOR A NEW PLANNING SCHEME

Key principles to consider for inclusion in the planning scheme are as follows:

- **Maximising Economic Development & Employment** – The retail sector is a key employer in Clarence and has significant economic multipliers in other sectors of the economy including wholesale trade, transport and distribution. It is important to ensure enough retail floorspace is provided in the study area that maximises economic development and employment in this and other sectors.

- **Demonstrating need** – Need for retail floorspace should be demonstrated in a particular catchment. New Centres should have their own catchment (recognising that trade areas may overlap to some extent) that reflects their position in the activity centre hierarchy. Applications for retail floorspace need to not only demonstrate minimal impacts but also a market gap.

- **Mitigating impacts** – Impacts of proposed developments on existing centres with regard to sales should be limited, this is of particular importance where a centre is proposing to develop above and beyond the intended use within the retail hierarchy. This principle will be achieved if the market need is demonstrated and a centre has its own defined primary catchment that does not overlap or is minimised with other centres. This balances the benefits of competition without creating negative impacts from a loss of existing business.

- **Reducing length and number of vehicle trips** – The cost of vehicle trips will have an impact on household budgets in residential areas. The hierarchy needs to be supported in a way that reduces the length of vehicle trips where possible.

- **Encouraging a mix of uses** – Apart from a diversity of retail, other supporting and complementary uses need to be accommodated in activity centres. Land parcels need to be identified for residential accommodation and commercial floorspace to allow opportunities for mixed use activity and development.

These principles are designed to encourage sustainable economic development and maximise the wealth of residents in Clarence by reducing the cost of shopping and commuting to work.

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