DEVONPORT CITY COUNCIL
ABN: 47 611 446 016
PO Box 604 Devonport TAS 7310 – 137 Rooke Street, Devonport
Telephone 03 6424 0511
Email council@devonport.tas.gov.au Web www.devonport.tas.gov.au

3 August 2022

Mr Robert Vellacott
11 Cocker Place,
DEVONPORT TAS 7310

Dear Mr Vellacott,

Response To Questions Without Notice – 25 July 2022 Council Meeting

I write in response to your question without notice, taken on notice at the Council Meeting on Monday, 25 July 2022, as outlined below.

Q1 I refer to the eyesore left in the former library's nature or garden strip situated in Oldaker Street that was left after the removal of the temporary bus shelter a couple of years ago. When will this section be reinstated and other areas around the property are brought back to an acceptable standard expected in a CBD?

Response
Reinstatement of the garden section impacted by the temporary bus shelter is a low priority but is scheduled to occur in the near future. At this point there are no other notable maintenance activities planned for the property.

Yours sincerely

Matthew Atkins
GENERAL MANAGER

STEVE MARTIN
DEVONPORT
PO Box 45, Don, TAS 7310
Mob: 0418 614 781
Email: steve.martin.tas@outlook.com

The General Manager, Mayor & Councillors
Devonport City Council,
PO Box 604,
Devonport TAS 7310.

Dear General Manager, Mayor & Councillors,

Question on Notice – Council Meeting, Monday 22nd August 2022

The annual Devonport Australia Day Awards recognises the achievements of community members and groups who have made a significant contribution to the Devonport community. Nominations may be submitted in the categories of Citizen of the Year, Young Citizen of the Year and Community Event of the Year.

The awards reflect values such as the pursuit of excellence, commitment to tolerant and diverse society, a fair go and public service.

With two individual awards, groups are only recognised if a submission is made in the category of Community Event of the Year, i.e. if the group has conducted an event/s. However, sometimes there's not just one committee member or volunteer making a significant impact – it may be a whole group of members and or volunteers that come together to make incredible things happen and it may not be through an event.

There are many local community groups and not for profit organisations that make significant contributions to the welfare of people, the quality of life, the arts, science, the environment and many other fields of endeavour. Such local groups and organisations may not conduct events but still play a vital role for our community, enhancing the social, economic, commercial and environmental prosperity and in making meaningful connections within and outside our community.

It is therefore respectfully asked of Council to officially recognise the extraordinary efforts of our local community and not for profit groups by including the category of The Community Group of the Year Award in the upcoming 2023 Devonport Australia Day Awards and then on in perpetuity.

The importance in recognising and celebrating "*groups who have made a significant contribution to the Devonport community*" cannot be under estimated, as they generate such a positive impact that helps make our community strong and vibrant.

STEVE MARTIN
DEVONPORT
PO Box 45, Don, TAS 7310
Mob: 0418 614 781
Email: steve.martin.tas@outlook.com

I look forward to your most positive reply.

Yours sincerely,

Steve Martin
12th August 2022

Fairbrother

Construction, Joinery & Facility Management

Devonport
12 Stony Rise Road
Devonport Tasmania 7310
P 03 6420 7000
F 03 6424 6610

Launceston
55 Gleadow Street
Launceston Tasmania 7248
P 03 6333 2500

Hobart
59 Sandy Bay Road
Battery Point Tasmania 7004
P 03 6220 9000

Bendigo
PO Box 5076
Sandhurst East Victoria 3550
P 03 5445 9700

Warrnambool
PO Box 571
Warrnambool Victoria 3280
P 03 5565 2800

info@fairbrother.com.au
www.fairbrother.com.au

ABN 51 009 510 561

2nd March 2022

Devonport City Council
137 Rooke Street
DEVONPORT TAS 7310

ATTENTION: Matthew Atkins – General Manager

Dear Matthew,

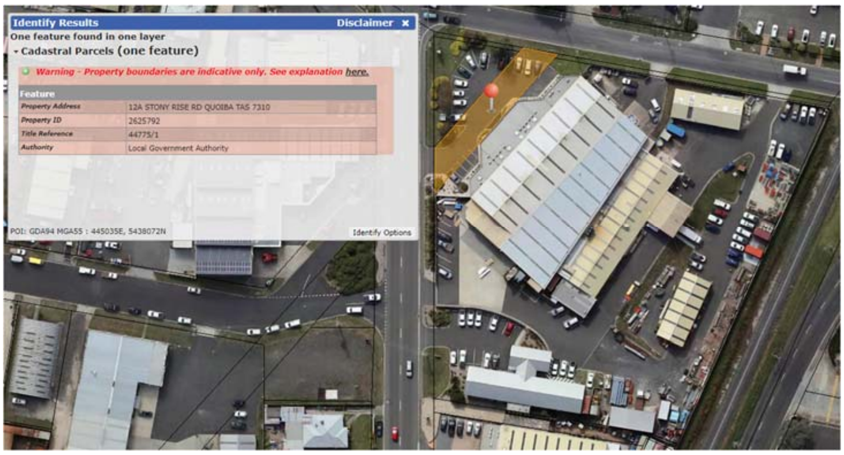
REFERENCE: OFFER TO ACQUIRE 12A STONY RISE ROAD CT44775/1

We are writing to you with an offer to acquire a parcel of land currently registered with Devonport City Council. This parcel of land is known as 12A Stony Rise Road, Devonport 44775/1.

Our need for acquiring this parcel: We are in the preliminary phase of establishing plans for the redevelopment of our property at 12 Stony Rise Road, Devonport. We are looking at this with a view that our redevelopment plans will accommodate Fairbrother's needs well into the future.

This redevelopment will represent an investment circa $4m+ and will cement the companies existing operations in the area for the foreseeable future.

In working through our existing site constraints, we are aware that Devonport City Council are the registered owners of a parcel of land at 12A Stony Rise Road, Devonport – 44775/1. This parcel separates our titles 8459/8 and 111981/1 known as 10-12 Stony Rise Road. See image below:

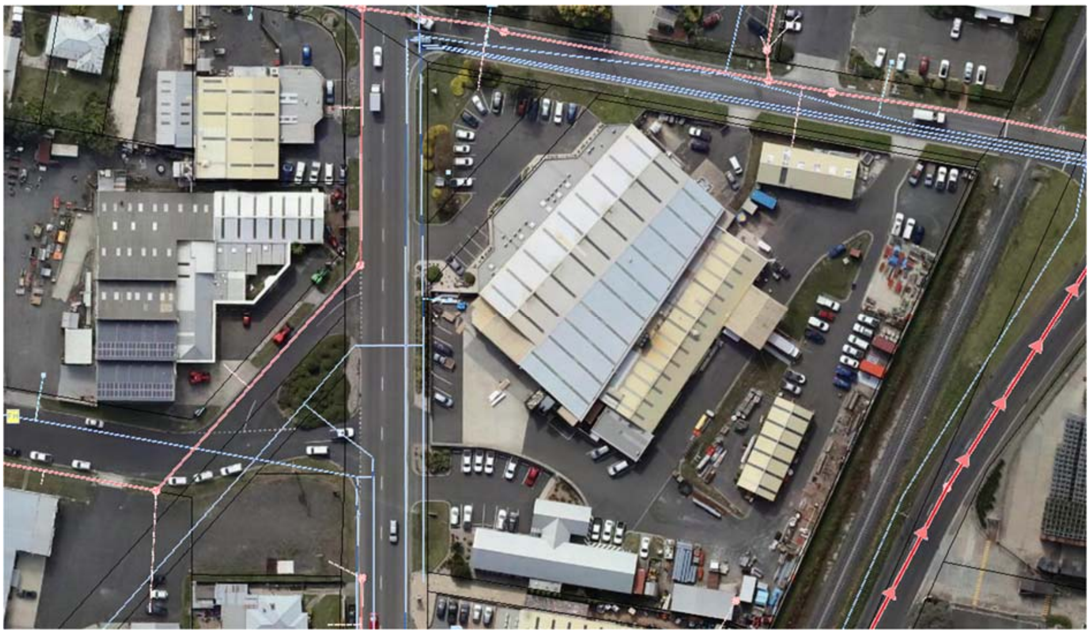


We understand that the original intention for the 12A Stony Rise Road parcel was to create a thoroughfare for a Water Main running from the reservoir on Squibbs Road, Spreyton.

FRM-CRP-126A
PARENT: PRO-SQE-379

dlcs ISO 9001 certified
ISO 45001 certified
ISO 14001 certified
FSC APPROVED • GET ACCREDITED • GET BUILDING

From our knowledge, this Water Main was never installed on 12A Stony Rise Road, it was in fact installed parallel with Stony Rise Road and turned down Durkins Road as illustrated on the below image:



To allow Fairbrother to maximise the full potential of our site through this redevelopment, we are proposing that Fairbrother acquire 12A Stony Rise Road, Devonport – 44775/1 from the Devonport City Council.

Subsequent to this acquirement, it is our intention to adhere all three titles.

We see this piece of land as having zero value to Devonport City Council, and therefore Fairbrother Pty Ltd is offering to pay all reasonable costs incurred by the Devonport City Council in facilitating the title transfer of CT44775/1 to Fairbrother Pty Ltd.

We trust that this offer is to your satisfaction. If you have any questions, our would like further information, please don't hesitate to contact me.

We look forward to your prompt response.

Yours sincerely,

Kurt Arnold
Chief Executive Officer

FRM-CRP-126A
PARENT: PRO-SQE-379

RESULT OF SEARCH

RECORDER OF TITLES

Issued Pursuant to the Land Titles Act 1980

Tasmanian Government

SEARCH OF TORRENS TITLE

VOLUME	FOLIO
44775	1
EDITION	DATE OF ISSUE
2	02-Jul-2015

SEARCH DATE : 04-Jul-2022
SEARCH TIME : 09.01 AM

DESCRIPTION OF LAND

City of DEVONPORT
Lot 1 on Diagram 44775
Derivation : Part of Lots 3643 & 6183 Granted to S. Kelcey
Prior CT 3680/82

SCHEDULE 1

14070 DEVONPORT CITY COUNCIL

SCHEDULE 2

Reservations and conditions in the Crown Grant if any
BENEFITING EASEMENT full and free liberty and license at all times hereafter to enter upon the roadway marked A.B. C.D. on Diagram No. 44775 to lay down pipes and to carry water in the said pipes and from time to time and at all times hereafter to dig search for and examine the said pipes and do all necessary cleansing and repairs and renewals thereof in over and upon the said Roadway when occasion shall require
BOUNDARY FENCES CONDITION in Transfer

UNREGISTERED DEALINGS AND NOTATIONS

No unregistered dealings or other notations

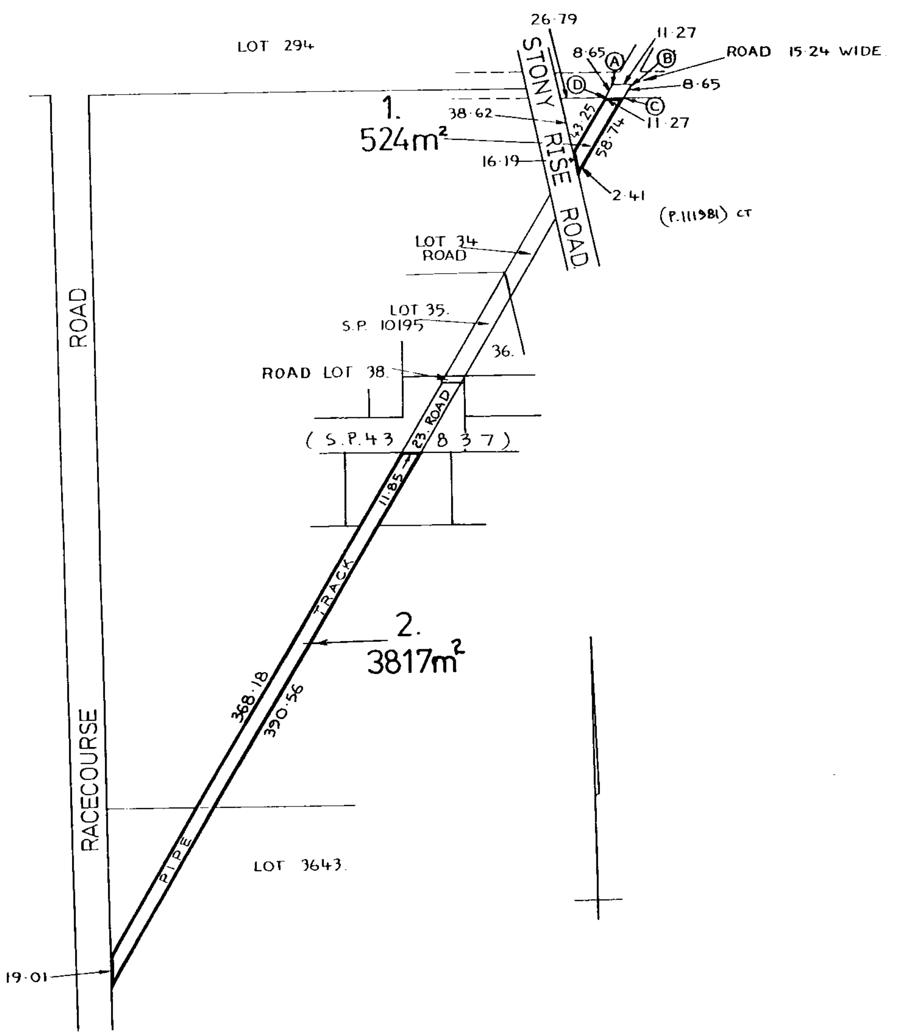
FOLIO PLAN

RECORDER OF TITLES

Issued Pursuant to the Land Titles Act 1980

Tasmanian Government

Owner:	PLAN OF TITLE of land situated in the CITY OF DEVONPORT	Registered Number D.44775
Title Reference: C.T.3680/82		
Grantee.	COMPILED FROM (6/32 DEV)(9/14 DEV)	Approved 28 JUN 1990 Recorder of Titles
	SCALE 1:3000 MEASUREMENTS IN METRES	



PARTNERSHIP AGREEMENT
BETWEEN
NATIONAL TRUST AUSTRALIA, TASMANIA
AND
DEVONPORT CITY COUNCIL

July 2022 to June 2025

1.0 PURPOSE

This Agreement establishes a set of principles and obligations in relation to funding arrangements between the Devonport City Council (Council) and National Trust Australia, Tasmania, to ensure the ongoing sustainability of the property at 77 Middle Road, Devonport, known as Home Hill.

2.0 TIMEFRAME

This agreement is for a period of three (3) years from the date of signing and is to be reviewed every twelve (12) months.

3.0 DEVONPORT STRATEGIC PLAN 2009-2030 RELEVANT PRIORITIES (revised April 2019)

Strategy 2.3.1	Develop and maintain long term Strategic Asset Management Plans
Strategy 2.3.4	Provide and maintain Council buildings, facilities and amenities to appropriate standards
Strategy 2.3.5	Provide and maintain sustainable parks, gardens and open spaces to appropriate standards
Strategy 3.2.1	Support tourism through the provision of well-designed and managed infrastructure and facilities
Strategy 3.2.2	Support regional tourism development through productive relationships with regional partners and State and Federal Government
Strategy 3.2.3	Facilitate a pro-active approach by business to embrace tourism opportunities
Strategy 4.3.1	Develop and implement initiatives to preserve and maintain heritage buildings, items and places of interest

4.0 NATIONAL TRUST AUSTRALIA, , TASMANIA, OVERVIEW AND RELEVANT PRIORITIES

The National Trust Australia, Tasmania, is responsible for operating Home Hill as a House Museum, including the preservation, restoration, exhibition, promotion and marketing of the collection, furniture and fittings inside Home Hill.
The National Trust, through the Property Manager, is also responsible for the coordination of the Home Hill Volunteer Group.

Objectives

- provide ongoing conservation services for the collection at Home Hill;
- provide a relevant visitor experience of Home Hill;
- protect the heritage values of Home Hill;
- generate public support for Home Hill;
- maintain and enhance the volunteer program for Home Hill;
- provide and coordinative public programming and the educational programming for the site;
- Meet national benchmark standards for sustainable Heritage Management of a community asset.

5.0 BENEFITS

The Agreement has the potential to result in a range of benefits including, but not limited to:

- increased volunteer base;
- increased the sustainability of Home Hill;
- additional opportunities to promote and advertise Home Hill;
- increased communication between Council and National Trust;
- increased access to properties of public interest;
- opportunity to showcase a Heritage Management Model;

6.0 PRINCIPLES

This Agreement is based upon a relationship between the parties emphasising cooperation and commitment to the following principles:

6.1 understanding and respect for each party's mandates and responsibilities;

6.2 each party is responsible for maintaining control of their own affairs;

6.3 subject to relevant legislation and policies (i.e. *Financial Management Act 2008*), the transparency of financial relations between the Council and National Trust Australia , Tasmania, in order to enhance decision-making;

6.4 the fostering of opportunities to work collaboratively;

6.5 shared focus on ensuring the ongoing sustainability of the operations of Home Hill; and

6.6 transparent and timely communication and consultation.

7.0 OBLIGATIONS OF THE PARTIES

The Council and National Trust Australia, Tasmania, agree to:

7.1 engage in timely, cooperative and meaningful consultation and negotiation regarding the formulation of policies, plans and activities which affect this Agreement;

7.2 relate to the other party in a manner that is coordinated and consistent;

7.3 ensure that specific contracts, arrangements, policies and plans entered into or carried out by the parties are consistent with the Agreement;

7.4 subject to privacy legislation and policies, share relevant data and information to inform strategic planning and service delivery;

7.5 develop processes to promote a common understanding of mutual priority needs; and

7.6 develop a process for review of the effectiveness of this Agreement with progress assessed twelve months from the date that the Agreement comes into effect.

8.0 STATEMENT OF RESPONSIBILITIES

8.1 Devonport City Council will:

8.1.1 maintain the external building and surrounding landscape of Home Hill;

8.1.2 provide annual maintenance program for the exterior of the buildings and surrounding landscape of Home Hill;

8.1.3 cover the costs of water, security services and Council rates;

8.1.4 provide expertise and support in the development and maintenance of the external buildings and gardens at Home Hill;

8.1.5 consider occasional assistance with bigger cost items (such as capital items or major maintenance items);

8.1.6 assist in the marketing and promotion of Home Hill and services through Council's communication mediums;

8.1.7 in negotiation with the National Trust Australia, Tasmania, review the lease for Home Hill;

8.1.8 in negotiation with the National Trust Australia, Tasmania, review the Strategic Plan for Home Hill;

8.1.9 make a payment of $28,000 per year for three years commencing 1 July 2022 to the National Trust Australia, Tasmania, to ensure the ongoing operations of Home Hill;

Note this agreement excludes Home Hill from accessing additional funds through Council's Financial Assistance Grants Scheme and other avenues.

8.2 The National Trust Australia, Tasmania, will:

8.2.1 aim to deliver services which promote the importance of the property known as Home Hill;

8.2.2 strive to attract additional resources and partnerships to ensure ongoing sustainability of Home Hill;

8.2.3 ensure that a collection management policies and procedures are in place and comply to relevant contemporary standards;

8.2.4 ensure that the collection remains accessible to the public;

8.2.5 continue to employ a property manager for the site;

8.2.6 ensure that the Council is given the opportunity to provide feedback on the performance of the property manager;

8.2.7 recruit and maintain volunteers in accordance with the National Trust policies and guidelines;

8.2.8 provide Council with a copy of public liability and personal accident insurance;

8.2.9 develop and deliver joint projects, activities and events with Council, including utilising the Home Hill property;

8.2.10 provide relevant data to support Council's strategic planning and policies;

8.2.11 actively participate in relevant Council Committees as requested;

8.2.12 promote Council support to customers, other community services and the media in a positive manner;

8.2.13 include Council's branding in relevant promotional material;

8.2.14 abide by the terms and conditions of lease documents;

8.2.15 continue to foster a relationship with past stakeholders to Home Hill to maximise opportunities to attract relevant items of the collection;

8.2.16 maintain a consistent approach to opening hours and ensure that they are well publicised;

8.2.17 provide advice regarding local heritage projects and/or activities;

8.2.18 establish a mechanism to determine visitor numbers including group types and visitor feedback;

8.2.19 provide an annual report to Council of activities undertaken in relation to the Agreement and financial statement which outlines how partnership agreement funds were expended.

9.0 PERFORMANCE INDICATORS

The following indicators will assist in measuring the effectiveness of The Agreement.

Indicator	Provided By	Frequency
9.1 Performance against strategies in Devonport Strategic Plan 2009-2030	NTA (Tas)	Annually
9.2 Increased participation by the broader community in Home Hill activities	NTA (Tas)	Annually
9.3 Number activities promoted	NTA (Tas)	Annually
9.4 Level of funding attracted	NTA (Tas)	Annually

10.0 KEY MILESTONES

Description	Provided By	Target Date
Payment 1	Council	30 August 2022
Annual report – Year 1	NTA (Tas)	31 July 2023
Payment 2	Council	30 August 2023
Annual report – Year 2	NTA (Tas)	31 July 2024
Payment 3	Council	30 August 2024
Annual report – Year 3	NTA (Tas)	31 July 2025

11.0 RELATIONSHIP OF THIS AGREEMENT TO OTHER DOCUMENTS

This Agreement is not intended to supersede or alter existing contractual or other agreements between the Devonport City Council and the National Trust Australia, Tasmania.

12.0 MANAGING DIFFERENCE, EVALUATION AND REVIEW

The parties agree to work constructively to honour the terms of this Agreement.

The parties agree that in the event of a party stating that one or more undertakings in the Agreement is not being fulfilled that the parties will use best endeavours to ensure that the undertaking is satisfied or that an alternative solution is agreed.

If the National Trust Australia, Tasmania, otherwise fail to comply with the terms of The Agreement after having been given 30 days notice to rectify then the Council may terminate this Agreement. The National Trust Australia, Tasmania, may terminate the Agreement at any time providing Council with reasoning and 30 days notice. If the Agreement is terminated the National Trust Australia, Tasmania, will refund a proportion of monies paid in the given financial year.

The parties agree to monitor the implementation of the Agreement and evaluate its effectiveness on an annual basis; however The Agreement can be amended with the agreement of both parties at any time.

Two-way feedback and monitoring will be through the Home Hill Property Manager and Council's Community Partnerships Manager.

13.0 SIGNATORIES OF THE PARTIES

Executed as an agreement

Signed for on behalf of the Devonport City Council

Name: Matthew Atkins

Position: General Manager

Signature: ___________________________________

Date: 2022

Signed for on behalf of the National Trust Australia, Tasmania,

Name: Scott Carlin
Position: Managing Director

Signature: ___________________________________

Date: 2022

Devonport City Council response to proposed changes to code of conduct legislation

Adopted by Council at its meeting on xx (insert minute ref)

Proposed Legislative Change	DCC Comment
A standard code of conduct for councils	Mandating a standard code which applies for all councils is logical. It ensures consistency, is more efficient and will assist in the assessment of complaints
Behaviour standards policy for councillors	The need to legislate that a council has the 'option' to adopt such a policy appears unnecessary. If the mandated code of conduct does not include sufficient definition regarding expected behaviours, then the standards policy should be mandated, however a simpler approach would be to ensure the code is sufficient and remove any reference to an 'optional' policy. Many councils already have various policies which reference actions and behaviours expected of elected members, this can continue regardless of any specific legislative reference.
Local dispute resolution policy	The mandating of a local dispute policy is cautiously supported. In some instances, it may assist in the resolution of community concerns, however it equally may result in further unintended consequences and the content and detail of any such policy would need careful consideration. Potential issues include: • The local dispute policy, simply becoming another step for complainants of a frivolous and vexatious nature. The existing draft legislation appears deficient in preventing such from occurring. • The local dispute resolution process would need powers to dismiss rather than just mediate a complaint. The outcome from the local process should be upheld or at the very least hold weight if the matter was then referred as a code complaint. • Identifying who the suitable person/s are to consider complaints and the methodology to be applied will be difficult.

	• It should be noted that prior to the current code of conduct structure a local dispute process similar to that proposed was in existence and deemed ineffective. Learning from the failure of the previous 'local' system should be considered and where possible addressed in the new legislation.
Making a code of conduct complaint	The additional information required as part of a complaint should include the two items noted plus a further requirement to detail not only the outcome of any local dispute process but also the specific reasons why the outcome is not accepted.
Timeframe for completing initial assessment and referral by general manager	Proposed amendments are supported
Initial assessment of a code of conduct complaint	Removing the initial assessment from the Panel Chair is supported. As is, the requirement of the assessment to be by a lawyer, who cannot then be part of the Panel for that specific matter. This could be further enhanced by removing the initial assessing lawyer/s from all Panel roles. A pool of 2 to 3 lawyers could be used to undertake all initial assessments and be fully independent from the Panel process. These lawyers should be obligated twice yearly to meet with the LGAT President and CEO to remain abreast of current local government matters specifically those that may be impacting the complaint process. The current ground for dismissing complaints is not sufficient and repeatedly allows complaints of a minor and trivial nature to progress to an investigation stage. While the two suggested additional grounds for dismissal have merit, they are insufficient to prevent the current deficiencies. Grounds for dismissing a complaint should include a clause which allows dismissal to occur based on the outcome of the local process being considered reasonable. In undertaking the initial assessment, patterns of complaints from regular complainants should form part of the consideration for dismissal.

Investigating Panel for a code of conduct complaint	Proposed amendments are supported, the initial assessor should not then be a member of the Panel.
Conflict of interest	No concerns identified, administrative in nature
Costs and expenses to be borne by council	No concerns identified, administrative in nature
Confidentiality of determination report and related document, report or information	No concerns identified, administrative in nature
Notification of compliance with sanctions	Proposed amendments requiring notification to Executive Officer, rather than General Manager are supported.
Refund of fee accompanying lodgement of code of conduct complaint	No concerns identified, administrative in nature
Transitional provisions	No concerns identified, administrative in nature

~~PAYMENT OF~~ COUNCILLOR~~'S~~ ALLOWANCES, EXPENSES AND PROVISION OF FACILITIES POLICY

POLICY TYPE	POLICY ADOPTED (DATE)	MINUTE NUMBER	~~POLICY DOCUMENT NUMBER (TRIM)~~
Council	~~18 December 2018~~	~~241/18~~	~~D560805~~
DOCUMENT CONTROLLER	RESPONSIBLE MANAGER	STRATEGIC PLAN 2009-2030 (STRATEGY REFERENCE)	DATE OF NEXT REVIEW
General Manager	General Manager	5.3.2 - Provide appropriate support to elected members to enable them to discharge their functions	~~Following each election~~

PURPOSE

To ~~detail~~ formalise the payment of Councillor~~'s~~ allowances and expenses and to ensure there is ~~no confusion~~transparency in relation to the claiming and payment of expenses, allowances and attendance at professional development conferences, seminars and functions.

Th~~is~~e policy also details the provision of facilities to be provided to the Mayor and Councillors to assist them in carrying out their civic roles and responsibilities.

SCOPE

This Policy applies to all Councillors and all allowances, related expenses and facilities provided to Councillors.

POLICY

1. **Councillor's Allowance:**
   - **1.1.** In accordance with Regulation 42 of the *Local Government (General) Regulations 2015*, and ~~Section~~ section 340A of the *Local Government Act 1993*, Council shall pay the annual allowance payable, fortnightly in arrears. Regulation 42 specifies ~~the~~ allowances payable to Councillors, Mayors and Deputy Mayors. ~~This Regulation establishes an indexation process so that allowances are adjusted each year.~~In accordance with Regulation 42 (2)(b), allowances are indexed annually.
   - **1.2.** In accordance with s~~S~~ection 340A of the *Local Government Act 1993*, a Councillor may determine not to receive all or part of the prescribed allowance. Notification of such ~~a~~ decisions is to be provided to the General Manager in writing.~~,~~ A~~a~~ny such notification cannot be retrospective.

2. **Travelling Expenses:**
   - **2.1.** Council will pay to or on behalf of Councillors, a reimbursement of necessary accommodation and out-of-pocket expenses, supported by receipts where appropriate, incurred by Councillors when travelling to discharge their function as a Councillor in respect of the following:
     - a) upon business of the Council, outside the Council area but within Tasmania (claims to be authorised by the General Manager);
     - b) upon business of the Council, outside Tasmania, in compliance with a resolution of Council (refer clause 4.3)~~;~~
     - c) to and from any seminar/conference within Tasmania (claims to be authorised by the General Manager);
     - d) to and from any seminar/conference outside Tasmania, in compliance with a resolution of Council.

	2.2. Clause 2.1 shall not apply to travel, where alternative arrangements are made for travel. **2.3.** Mileage allowance for the use of a private vehicle will be paid at the rate prescribed ~~from time to time~~ by the Australian Taxation Office for an ordinary car 1601cc-2600cc (~~currently 68 cents per kilometre – 2018/19 financial year)~~, for the direct route to and from the venue. **2.4.** A Councillor shall not claim travel or other expenses where the expense would otherwise have been incurred as a result of private business. **3. Carer's Allowance:** Should the need arise, Council will reimburse on presentation of receipts, the cost of reasonable care by a registered carer of any person for whom the Councillor is the primary carer, where care is required to allow the Councillor to carry out their duties of office. **4. Conferences and Seminars:** **4.1.** Council will pay, on behalf of Councillors, registration, accommodation and out-of-pocket expenses where supported by receipts, other than those paid in accordance with Clause 2.2 of this policy, in respect of attendance at any seminar or conference, directly related to the role of Councillor, inside Tasmania. **4.2.** The Mayor or the Mayor's nominee shall be entitled to attend the Annual ALGA National General Assembly. **4.3.** In respect of any interstate conferences, the matter shall be referred to Council ~~who shall make a~~to ~~determination~~ determine ~~as to~~ whether any elected member should attend the conference ~~in question~~. If attendance is approved, Council will pay on behalf of the Councillor, registration, accommodation, airfares and out-of-pocket expenses, where supported by receipt, other than those paid in accordance with Clause 2.2 of this policy. **4.4.** Councillors are to provide a report or summary, ~~whether~~ written or verbal, on each interstate conference attended within three (3) months of the conclusion of ~~such~~ the conference ~~and~~. ~~this~~ The report may be prepared individually by elected members or may be a joint report of the Councillors who attended. **4.5.** Any expenses not previously mentioned within this Policy of a personal nature e.g. entertainment, video-hire and mini bar, will not be eligible for reimbursement and shall remain the responsibility of the Councillor. **4.6.** In the instance where the Mayor or Deputy Mayor cannot represent Council at a function or event where the Mayor has determined Council requires representation, the Mayor may request another Councillor attend on Council's behalf, for which Council will meet the cost. **5. Claims for Expenses and Allowances~~:~~** **5.1.** Claims for reimbursement of expenses incurred in accordance with this policy shall be made to the General Manager no later

than three (3) months after the expense has been incurred. Any claim shall be submitted in writing on the prescribed form and must include receipts relating to the claim.

5.2. Reimbursement of claims will be paid ~~monthly as part of the direct deposit of the Councillor's Allowance.~~ via accounts payable.

5.3. Where, in the opinion of the General Manager, a question arises as to whether a claim for reimbursement of expenses or any part, is ineligible under this policy, or the claim is unreasonable or does not serve the interests of Council, the claim shall be referred to Council for decision.

6. Expenses~~:~~

6.1. Council will meet the reasonable expenses of office incurred by the Mayor in carrying out the responsibility of that office.

6.2. ~~Such e~~Expenses associated with the position of Mayor shall be reported to Council as part of the Elected Members Expenditure Report.

6.3. In accordance with Section 72(1)(cb) of the *Local Government Act 1993*, a table outlining all allowances and expenses paid to/or on behalf of the Mayor, Deputy Mayor and Councillors is to be reported in the Annual Report.

7. Provision of Facilities:

7.1. Council will provide to the Mayor, office accommodation, computer and telephone facilities together with administrative support to assist in discharging the Office of Mayor.

7.2. Council will provide to the Mayor, a motor vehicle ~~to a maximum engine capacity of 2.5 litres~~in accordance with specifications outlined in the Vehicle Policy and Procedure, for unrestricted use within Tasmania.

7.3. ~~Computer and telephone~~ Telephone facilities will be provided in the Councillor's Room. Any Councillors may use the telephone for calls related to the discharge of their functions as a Councillor.

7.4. Council will provide Councillors with ~~a mobile device, generally~~ a ~~IPad~~laptop computer, to enable communication such as email and internet access, and for provision of all Council documents including agendas, minutes and workshop information.

7.5. Council will provide Councillors with a supply of business cards, if required.

7.6. Councillors will be provided with free parking within the City area upon provision of their motor vehicle registration number for one vehicle. Councillors can also access the CBD Multi-Level Carpark at no charge by utilising their paranaple centre access card.

8. Insurance:

Council will provide appropriate insurance coverage to Councillors, to apply whilst travelling to and from meetings and carrying out duties

	on behalf of the Council, including but not limited to, Public Liability and Professional Indemnity, Personal Accident and Corporate Travel Insurance.			
LEGISLATION AND RELATED DOCUMENTS	*Local Government Act 1993* (Section 340A and Section 5) *Local Government (General) Regulations 2015* Regulation 42 Vehicle Policy and Procedure			
ATTACHMENT/S (IF APPLICABLE)	~~Request for Reimbursement of Expenditure Form – Appendix 1~~			
TRAINING REQUIREMENTS (IF APPLICABLE)	Is training required as result of this Policy		**YES**	~~NO~~
	Training required by:	**Councillors**	~~Staff~~	~~Department~~

Signage Strategy 2022-2027

Devonport City Council

Next date of review:	August 2027
Document controller:	Executive Manager – City Growth
Document reviewer:	Infrastructure and Works Manager
Date adopted by Council:	Insert Date
Resolution number:	Insert resolution number

Table of contents

1 Introduction:

Council first adopted a Signage Strategy in 2013, which was reviewed in 2017. The delivery of the actions contained in this strategy has contributed to improvements in the way people are able to navigate the City, find destinations and amenities, and have a fulfilling experience.

This review and renewal of the strategy is required to ensure it remains in alignment with Council's Strategic Plan 2009-2030, and that it responds to any significant external changes and opportunities to continue to meet the needs and expectations of the community.

1.1 Scope

Council owns and maintains thousands of signs with an estimated replacement value of over $1.2 million.

The strategy applies to signage developed for Council owned, managed or supported facilities, amenities, and services. The Strategy does not apply to regulatory signage or privately owned signage.

1.2 Objectives

The purpose of a sign is to convey information to assist the receiver with decision making. In the context of this Strategy, Council uses signs to convey information to its customers about its facilities, amenities, and services. The strategy, building on previous versions, intends to achieve four objectives:

1. Signage aligns with and positively contributes to the Devonport Brand.
2. Signage enhances the Devonport experience for visitors and locals.
3. Signage supports universal access to information and destinations.
4. Signage is designed and installed in accordance with recognised principles.

2 Strategic and Legislative Context:

Council has adopted a vision for the future of our municipality as outlined in the Council Strategic Plan 2009-2030:

"Devonport will be a thriving and welcoming regional city, living lightly by river and sea."

The Strategic Plan sets goals and outcomes to be achieved over the life of the plan. The goals set out where the organisation wants to be. The outcomes and underpinning strategies are the steps needed to get there. Goals and strategies relating to signage are shown in Table 1.

Goal No.	Goal	Strategy No.	Strategy	Signage Strategy 2022-27 Context
2	Building a unique city	2.2.1	Maintain a local brand that supports our competitive advantages.	An effective and integrated signage system contributes to the Devonport brand.
3	Growing a vibrant economy	3.2.1	Support tourism through the provision of well-designed and managed infrastructure and facilities.	Signage is a key component of attracting tourists to their destination.
		3.3.1	Improve the City's physical access and connectivity focusing on linkages to and from key access points.	Effective and efficient wayfinding within the City relies on good signage.
4	Building quality of life	4.3.1	Develop and implement initiatives to preserve and maintain heritage buildings, items and places of interest.	Signage is a way of recognising the importance of a place or feature, which can contribute to its preservation.
5	Practicing excellence in governance	5.4.1	Provide timely, efficient, consistent services which are aligned with and meet customer needs.	Provision of signage is a service the Council provides.

Table 1: Strategic and legislative context

There are other Council strategies that the Signage Strategy 2022-2027 relates to:

- Bike Riding Strategy 2015-2020.
- Disability Inclusion Plan 2020-2025.
- Digital Strategy 2017-2021.
- LIVING CITY Master Plan.
- Open Space Strategy.
- Parking Strategy 2016.
- Pedestrian Strategy 2016-2021.
- Road Network Strategy 2016.
- Tourism Strategy 2022-24.

The following documents have also been referenced during development of this strategy:

- AS1742.5 Australian Standard - Street Name and Community Facility Name Signs.
- Tasmanian Roadside Signs Manual.
- *Place Names Act 2020* (Tasmania).

3 Current context:

Since 2013, Council has delivered signage projects and activities aligned with strategic objectives. This has resulted in significant improvements to the consistency and presentation of signage across the municipality.

3.1 Sign family

A sign family, also known as a sign hierarchy or sign system, is a range of related signs that are visually similar and work complimentarily to convey graduated levels of information to the user as they progress.

The sign family has evolved since 2013, adapting to the signage needs of particular projects or sites, but retaining its style across a range of forms. Images below show adaption of the totem sign for installation at Mersey Vale Memorial Park (left) and on the Coastal Pathway (right).

As seen in Figure 1 (on page 7), the sign family is quite well developed in some areas, and similarly the rollout of signs has been more extensive in some areas, e.g., sports grounds, than others. The more complex activity of designing major and minor gateway signs is yet to be compete and is a high-priority action required to deliver the strategic objectives.

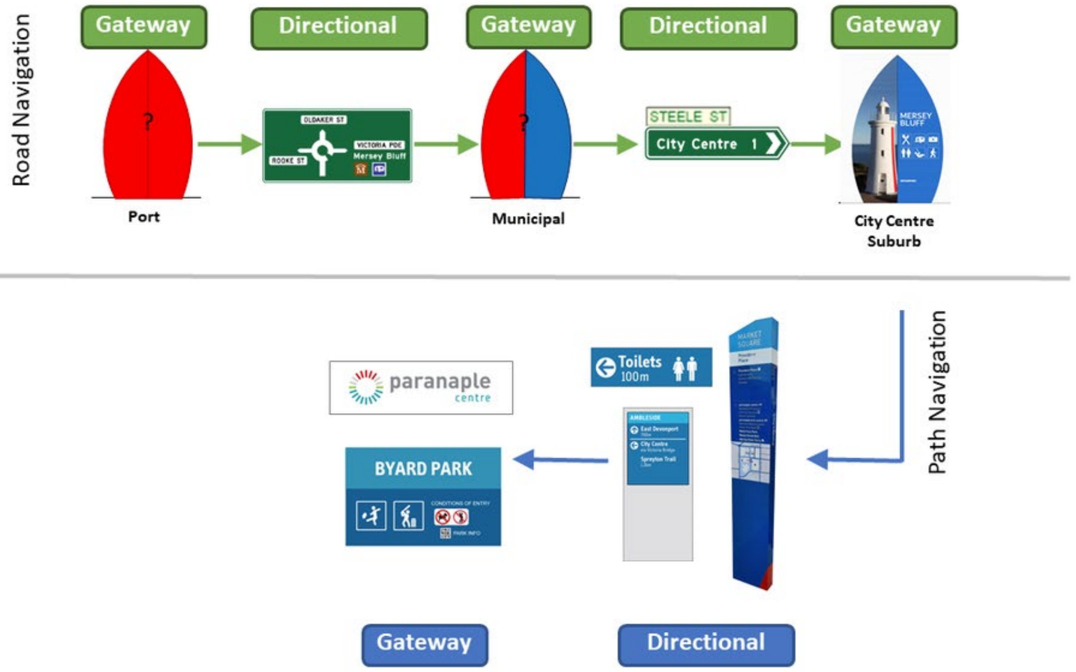


Figure 1: Sign family 2022

3.2 Attracting tourists and visitors to Devonport

Two objectives of the LIVING CITY Master Plan are to:

- Connect the city centre together, and to
- Capture increased tourism visitation to the city from existing arrival locations

This recognised, amongst other issues, that Devonport is not attracting enough tourist arrivals to the Devonport city centre, particularly those that disembark from the Bass Strait ferries.

Areas for improvement have been identified and are in the early stage of implementation. Improvements will be delivered as part of the $3 million State Vehicle Entry Project (SVEP), being planned in conjunction with Tasports' Quaylink project to redevelop the East Devonport Port to accommodate new and larger Bass Strait ferries. City entrance markers are a key component of the SVEP.

Other opportunities exist through a review of the Bass Highway information sign, which was renewed in 2013, and on the route between the Devonport Airport and the city centre. In a competitive environment, signage can play a role in attracting tourists to Devonport.

3.3 Brand Devonport

A key action of the recently adopted Devonport Tourism Strategy 2022-24, includes the development of a refreshed visitor-facing *Destination Identity* for Devonport.

While not responsible for the development of the new branding identity, a key element of this strategy will be the consistent and effective implementation of this new branding where required across the municipality.

3.4 Wayfinding

Historically, there was very little wayfinding signage in Devonport. It seemed to be assumed that people from Devonport knew where they were going, and it would be easy for people from outside Devonport to work out where to go.

Needs and expectations have changed, and the concept of wayfinding has come to the fore, particularly as Devonport's economy has become more reliant on tourists and visitors.

Under previous versions of this strategy, considerable investment has been made in wayfinding signage, including:

- Map-based signs at activity centres including the CBD.
- Totem signs at decision making points on Council's recreational path network.
- Large totem signs in the CBD.

However, more work is required to ensure that customers are provided with an end-to-end wayfinding experience. Required work includes:

- Further roll out of existing sign types to increase coverage.
- Roll-out of other signs from the sign family to support and link existing installations.
- Ongoing maintenance of content to reflect changes in routes and destinations.

3.5 Technology

Since 2017, Council has commenced the use of Quick Response (QR) codes on signs, providing a link to a Council website that can add to or support the information conveyed on the sign. Check-in requirements during the coronavirus pandemic embedded the use of this tool for most of the community, which creates an opportunity to expand the use of QR codes. This further support by the recent redevelopment of Council's websites and ongoing digital transformation.

Council has also made small advances into variable signage. The use of variable message signs is common for roadworks, with benefits including customisable and up-to-date information being conveyed to road users. Using variations of this technology already available, Council can derive a wide range of benefits for the community. There are options to make further advancements in this area when variable signage can be integrated with smart devices and the Internet of Things (IoT). This will enable information to be delivered based on real time data and analysis.

4 Strategy development:

The Signage Strategy 2022-2027 builds on the platform created by previous versions and responds to the changes that have occurred in the area since then.

Through understanding the current context, an action plan can be developed to achieve the four identified objectives for this strategy. The areas of focus and opportunities are:

4.1 Major projects

Opportunities exist through major projects already underway, namely:

- LIVING CITY
- State Vehicle Entry Point Project (SVEP).
- Project Quaylink (TasPorts Port Redevelopment and expansion).
- The proposed City Entrance Marker project at the Don Road and Bass Highway interface.

To make major changes to Devonport's most important signage by delivering bold and memorable entrances to the city, and by providing accurate and engaging information and wayfinding signage at key tourist entry points to the city.

4.2 Brand Devonport

Continue to adapt and update the sign family in alignment with the updated Devonport Destination brand.

4.3 Technology

Implement new and emerging technology, such as digital wayfinding content, QR Codes linking to online content or services, and data capture and analytics platforms to present useful information to the public.

4.4 Access and inclusion

As the volume and complexity of information that can be conveyed increases, and the range of tools available broadens, Council will need to ensure that the format of the information being conveyed is accessible. Considerations include:

- Font and font size.
- Language (readability, inclusive language).
- Use of symbols.
- Use of non-visual communication (braille, audio etc).
- Position/location (including height).

Council should seek to adhere to all relevant standards and best practice guides when designing and installing signage. Understanding local needs is also important, so Council should strive to maintain engagement with the community on access and inclusion

5 Implementation:

The implementation of the Strategy Action Plan and therefore the achievement of its objectives requires specific and specialist inputs. In part, the skills and capacity exist to address the areas of focus and deliver the strategic actions. However, planning for appropriate resource allocation of the life of the Strategy will ensure that the objectives are achieved as intended. Allocations include:

- Suitable capital budget allocations.
- Suitable allocation of operational resources, including staff time.
- Training and development to maintain and enhance organisational capability.
- Embedding of activities into existing processes.
- Engagement of specialist consultants.
- Community consultation and engagement.

Allocations as required by the Strategy Action Plan can be considered during the adoption of Council's annual plan and budget.

6 Monitoring, evaluation and review:

Council has an established method of reporting on progress of Strategic Actions annually.

Action Plan
Signage Strategy 2022-27

No	Action:	Year Planned					Priority: H,M,L	Resources: A-OPEX F-OPEX F-CAPEX	Targets	Responsible Department
		2022-23	2023-24	2024-25	2025-26	2026-27				
	Objective 1: Signage aligns with and positively contributes to the Devonport Brand									
1.1	Maintain the Devonport Brand in signage						H	A-Opex	Signage is aligned with the wider Devonport Brand	All departments
1.2	Continue rollout of major precinct signs						H	F-Capex	New markers are installed, and old markers removed	Infrastructure and Works
1.3	Renew minor city entrance markers						H	F-Capex	New markers are installed, and old markers removed	Infrastructure and Works
	Objective 2: Signage enhances the Devonport experience for visitors and locals									
2.1	Deliver City Entrance Markers via the State Vehicle Entry and proposed Don Road and Bass Highway interface projects						H	F-Capex	SVEP project is delivered Project at Don interchange confirmed and delivered	City Growth
2.2	Review the function need, purpose, and status Bass Highway Information Bay as it relates to city branding and information signage						H	F-Opex / F-Capex	A plan is developed and agreed, and budget allocations are made as required	City Growth
2.3	Improve CBD wayfinding, following the completion of the Waterfront Park						M	F-Capex	Consider findings of 2020 audit and implement priority actions	City Growth
2.4	Champion a regional approach to Coastal Pathway wayfinding						M	F-Capex	Coastal pathway has suitable wayfinding and branding	City Growth
2.5	Champion a partnership with Latrobe Council TasPorts and the Department of State Growth to improve signage from Devonport Airport						M	F-Opex / F-Capex	A stakeholder group cooperates to achieve improvements	City Growth
2.6	Enhance online content to support signage, using QR codes and similar						M	A-Opex	Online content is used wherever practical to enhance on-site signage	Infrastructure and Works, Facility operators, website owners
2.7	Improve directional signage from Formby Road to multi-level car park						M	F-Capex	Preferred route is clearly signed	Infrastructure and Works
2.8	Address wayfinding gaps using relevant signs from the sign family						M	F-Capex	Wayfinding is progressively improved	Infrastructure and Works
	Objective 3: Signage supports universal access to information and destinations									
3.1	Review sign design and content guidelines to ensure universal access						H	A-Opex	New signage meets best practice accessibility requirements	Community Services, Infrastructure and Works
3.2	Implement new and emerging technology to enhance signage							A-Opex	New signage incorporates best available technology	Infrastructure and Works, Information Technology

No	Action:	Year Planned					Priority: H,M,L	Resources: A-OPEX F-OPEX F-CAPEX	Targets	Responsible Department
		2022-23	2023-24	2024-25	2025-26	2026-27				
3.3	Implement park signage						M	F-Capex	Parks are named and signed to deliver community benefit	Governance, Infrastructure and Works
3.4	Review map-based signs						M	F-Capex	Map based signs or equivalent are up to date	Infrastructure and Works
3.5	Review car park signage						M	F-Capex	Review car park signage in response to changing technology and customer expectations	Corporate Services, Infrastructure and Works
	Objective 4: Signage is designed and installed in accordance with recognised principles									
4.1	Maintain a sign hierarchy						M	A-Opex	Signage is delivered as per the hierarchy	Infrastructure and Works
4.2	Signage aligned with the strategy is integrated into relevant projects						M	F-Capex	Projects are planned and delivered to support this action	Infrastructure and Works

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Signage Strategy 2022-27 - Feedback Received

#	Message
1	I totally support the concept of logical, intuitive, up to date and easy to interpret signage for Devonport. My only comment is to ensure it is an to end to end/ closed loop process so that all aspects relate to each other and make use of the most contemporary technology to ensure that happens consistently. Apps, for instance, that lead you to the signage itself and the comprehensive stories behind each site are essential. QR codes and associated info on all signage as well. It should be a closed loop for information. For instance if you were at the Bluff (or even planning to go there) links to the history of the area, amenities, cultural aspects and events (even parking would be a bonus)! through carefully integrated and adequately maintained digital integration would be a minimum. Therefore it needs to be someone's job to do so. Unfortunately I see this doesn't always happen - elation can turn to despair in an instant when you hit dead ends, broken links or out-of-date information. (The Council's Living City website is unfortunately a case in point. It hasn't been updated for a very long time - can someone please fix)? Good luck with the initiative and I look forward to seeing the results.
2	A short note to update the signage around Market Square to showcase existing tenants. I notice the signage around Market Square mentions Charlotte Jack, Souther Wild Distillery & Drysdale. Nothing anywhere relating to Firestorm, Island State Brewing & Frankie J's.
3	I'm very happy with the proposed Signage Strategy. I'm sure the consistent design will enhance the City's brand and assist visitors to navigate the city. I'm not certain if the following suggestion would be considered part of the plan. If not, would you please pass it on to the relevant party. I am a member of a group who are regular users of our beautiful pathways along Victoria Parade, East Devonport and the Don Reserve, for both cycling and walking. As these have become so popular and especially with the possible permanent introduction of escooters, we would like to see some signage to remind users of their responsibilities with regard to safe pathway use. Such signs are common on a number of pathways in neighbouring councils and on the mainland. Following is the wording of one on the pathway at Shearwater: Shared Pathway Keep Left Warn when approaching Move off path when stopped Control your dog The wording is accompanied by appropriate illustrations. I am happy to forward a photograph if this would assist.

Corporate Climate Change Adaptation Plan – Actions Status 2022

This report presents the Devonport City Council's risk statements, adaptation actions, and progress during 2021/22 for the priority climate change risk areas: Rainfall; Sea Level Rise and Storm Tide; Heat; and Bushfire.

1. RAINFALL RISKS

Risk	Risk level	Adaptation Action	Timeline (commencing July 2018)	Status	Outputs 30 June 2022
Stormwater system becoming under capacity in areas as a result of more intense, short duration rain events, leading to an increased requirement for upgrade or replacement	Extreme	Adequately resource the Action Plan accompanying the revised Stormwater Strategy - in particular, flood modelling of priority areas	Within a year	In progress	Stormwater System Management Plan adopted by Council in Dec 2019. The Plan identifies risk of flooding in urban catchments, allowing prioritisation of upgrade projects. Two major upgrade projects completed in 2020/21 ($900,000). $560,000 allocated for two projects currently in design phase.
		Continue preventative practices prior to and during extreme events e.g. clearing gutters and drains	Immediate	Ongoing	Known 'hot spots' are inspected prior to major events. Improved asset management and works management system is creating efficiencies for pre-emptive activities.

1. RAINFALL RISKS					
Risk	**Risk level**	**Adaptation Action**	**Timeline (commencing July 2018)**	**Status**	**Outputs 30 June 2022**
Increased rainfall / severe weather events leading to increased damage to infrastructure and roads resulting in increased maintenance and clean up costs	High	Increase resources towards monitoring and maintenance activities	Within 5 years	Ongoing	Improvements to asset management and works management systems have improved Council's capability to scheduled inspections using a risk-based approach, allow better prioritisation of reactive work and provide data to allow prioritisation of upgrade work when required.
Riparian vegetated buffers to waterways are insufficient to reduce velocity of overland flow during more intense, short duration rain events resulting in erosion of waterways and sedimentation downstream	High	Provide information to relevant sections of the community on the function of the catchments and buffers to waterways with the aim of retaining or revegetating riparian zones	Within a year	In progress	Community engaged in delivery of specific projects: • Friends of Don Reserve, Wildcare & Mersey Scouts assisted with planting at Figure of Eight Creek.
		Maintain and where required revegetate riparian zones on Council owned and managed land	Within a year	Ongoing	Native species planted as follows: • Figure of Eight Ck. 1100 plants
Increase in rainfall / flooding / high wind and other severe weather events leading to increased deterioration of roads, bridges, coastal and park infrastructure (e.g. trees, pontoons) resulting in heightened public safety concerns	Extreme	Assess tree damage after high wind & rain events	Immediate	Ongoing	Scheduled and targeted inspections are undertaken. System improvements now allow schedules to be set using a risk-based approach.

2. SEA LEVEL RISE AND STORM SURGE RISKS					
Risk	**Risk level**	**Adaptation Action**	**Timeline (commencing July 2018)**	**Status**	**Outputs 30 June 2022**
Extreme storm tide events resulting in foreshore erosion and inundation impacting on council owned and managed reserves, parks and facilities resulting in increased costs to the council	High	Advocate to the Cradle Coast Authority (CCA) for a coastal vulnerability study of council assets across the region or state- wide	Within 5 years	No action required	100-year sea level rise scenarios can be accessed via Coastal Risk website www.coastalrisk.com.au Various other reports include scenario maps developed in mid 2000s. Council uses existing information to assess coastal vulnerability of Council and private assets based on current information.
Sea level rise and increased coastal inundation during storm tide events resulting in areas becoming unsuitable for development or certain land-uses requiring rezoning through the Council's planning system and preparing for potential litigation issues for the Council	High	Abide with relevant codes of the Tasmanian Planning Scheme	Immediate	Ongoing	Council abides with Tasmanian Planning Scheme codes.
Increased coastal inundation during storm tide events resulting in inundation of Council owned and managed reserves resulting in environmental degradation and loss of coastal values	Moderate	Assess risks, prioritise works and implement dune / foreshore restoration programmes as required	Long term	Ongoing	Work completed at Coles Beach and Don Heads in 2021. Several sites are being monitored.

3. HEAT RISKS					
Risk	**Risk level**	**Adaptation Action**	**Timeline (commencing July 2018)**	**Status**	**Status 30 June 2022**
Increase in vector-borne illness which will have an adverse effect on public health leading to increased pressure on the public health system and potential spread of disease	Moderate	Comply with and support the direction provided by Tasmanian Government Public Health Services	Long term	Ongoing	No action required.
Increased temperatures leading to increased risk of sunburn and heat stress for users of council's public open space resulting in potential public liability claims and public complaints	Moderate	Ensure sufficient shade - natural or built - is available or planned for when developing new facilities in public open space	Long term	In progress	Shade sails to be installed in the Waterfront Park and Bluff skate park in 2022; funds allocated to reinstate sails in Rooke Street mall in 2022/23.
4. BUSHFIRE RISKS					
Risk	**Risk level**	**Adaptation Action**	**Timeline (commencing July 2018)**	**Status**	**Outputs 30 June 2022**
Increased likelihood and severity of bushfire across the Council's municipal area severely impacting on private property and businesses leading to increased costs	High	Alignment of bushfire management plans for council owned land to ensure appropriate and coordinated fire mitigation practices	Immediate	Complete	
Increased temperatures resulting in an increased bushfire risk leading to public safety concerns	Extreme	Improve emergency management & community disaster preparedness and response	Immediate	Ongoing	Council continues to work with emergency services to improve the community's disaster preparedness and response.
Altered fire regimes leading to a change in ecosystem function and reducing resilience of native flora/fauna/communities, particularly threatened species	Moderate	Implement prescribed burning regimes dictated by appropriate bushfire management plans, when resources are available	Long term	Ongoing	Fuel reduction burns conducted at KT Greenbelt September 2021 and Don Reserve 2022 in line with bushfire management plans.
5. OTHER RISKS					

Risk	Risk level	Adaptation Action	Timeline (commencing July 2018)	Status	Outputs 30 June 2022
Increased extreme weather events resulting in power outages and telecommunications failure to Council buildings and assets resulting in an inability of the Council to coordinate and deliver services and emergency management responses placing the community at risk	High	In accordance with the Business Continuity Plan identify alternative business locations and power supplies to enable continuous operations	Within a year	Complete	Council's Business Continuity Plan identifies alternative business locations. Alternative power supplies have been installed at those locations to enable continuous operations.
Increase in severe weather events across the region impacting on the capacity of state emergency services to respond to Devonport events resulting in resourcing challenges for Council	High	In line with Council's Business Continuity Plan, prioritise Council's service delivery, including reassigning employees to priority tasks	Within 5 years	Complete	
		Develop a volunteer register and provide relevant training for volunteers to assist with basic tasks in the event of an emergency	Within 5 years	In progress	Volunteering Tasmania has established a coordinated volunteer management service that matches the skills, availability, and location of spontaneous volunteers with volunteering opportunities available with councils and organisations responding to emergencies. Council works with VT on a range of volunteer initiatives.

5. STRATEGIC CORPORATE ADAPTATION ACTIONS

Strategic priorities are broad level climate change adaptation actions that do not specifically address a particular area or risk and fall across numerous Council service areas. There are key overarching corporate functions that are worth considering for minimising the Council's risk in the face of extreme events posed by climate change.

Action	Status	Outputs 30 June 2022
Ensure legal liability issues are addressed The legal advice established for Tasmanian councils is covered in Section 4	Ongoing	To be addressed at a regional and/or state level
Update Council's risk register Integrate climate change risk management into the Council's existing risk assessment framework and migrate treated risks to the risk register	Complete	Risks have been integrated with Council's risk register
Emergency management planning in relation to climate hazards Ensure that the projected impacts of climate change are properly considered in the Council's emergency management planning processes	Ongoing	Projections are presented and discussed at the Mersey Leven Emergency Management Committee
Implement communication strategy Develop and implement a climate change communication and education plan for the Council's staff. Increased staff capacity and awareness will assist in incorporating climate change scenarios and impacts into policy and decision making processes.	Not commenced	To be progressed when resources are available
Incorporate identified actions into other Council plans & strategies Consideration of climate change risks and impacts in other Council strategies, policies and plans (such as Strategic & Annual Plan). The climate change impacts, and risk process outlined throughout the Adaptation Plan should be considered in the development of future plans, policies and strategies. This will also ensure there are a range of potential internal mechanisms for important actions to be implemented.	Ongoing	This plan integrates with several other council documents and processes including Strategic Plan, Annual Plan, Environment Strategy, Stormwater Strategy, and Service Level documents.
Annual reporting Consider developing climate change related Key Performance Indicators that could be reported on through the Council's annual report	Not commenced	
Climate Change Champion Appoint a climate change champion supported by a cross Council team to implement the Adaptation Plan	Ongoing	While no champion has been appointed, a team of staff implement actions in this Plan

TERMS OF REFERENCE
DEVONPORT VOLUNTEERING WORKING GROUP

NAME
Devonport Volunteering Working Group (DVWG)

CATEGORY
Working Group

PURPOSE
The purpose of the Devonport Volunteering Working Group is to implement actions from the *Devonport Community Volunteer Sustainability Strategy 2021-2026*.

The Strategy outlines key collaborative actions aimed at safeguarding the future of volunteering in Devonport. The key aims of the Strategy (and therefore the DVWG) are:

Focus Area 1: Accessible & inclusive volunteering	• To build awareness and understanding of the value of volunteering for young people in Devonport. • To create welcoming and inclusive environments for new people to get involved in volunteering. • To increase the number of people volunteering across Devonport by making it easier for people to find and join volunteering opportunities.
Focus Area 2: Volunteer sector collaboration & connection	• To work more effectively and efficiently as a volunteering community in Devonport by networking and collaborating.
Focus Area 3: Culture of volunteering	• To celebrate and recognise the contribution volunteers make to our community in a meaningful way. • To build and embed a stronger volunteering culture across the local community by increasing awareness and understanding of Devonport's volunteering community. • To establish safe and enjoyable environments for volunteers.
Focus Area 4: Best practice volunteer management	• To build the capacity, capability and supports for the volunteering sector in Devonport. • To increase the number of volunteering groups and organisations in Devonport that use best practice volunteer management principles to create safe, enjoyable and productive volunteer experiences.

ROLES AND RESPONSIBILITIES

The Devonport Volunteering Working Group will:

- Review and update the Action Plan in the *Devonport Community Volunteering Sustainability Strategy 2021-2026*.
- Use the updated Action Plan to develop initiatives for members of the DVWG to undertake.
- Promote these initiatives to volunteers, volunteer involving organisations and the broader Devonport community.

MEMBERSHIP

Members of the Devonport Volunteering Working Group will have extensive knowledge and experience in volunteer management and support. Membership will comprise;

- Maximum of 10 representatives from volunteer involving organisations from the Devonport local government area, including members of the Local Volunteer Network Group involved in the development of the *Devonport Community Volunteering Sustainability Strategy 2021-2026.*
- One representative from Volunteering Tasmania.
- Maximum of two Devonport City Council elected members.

Council staff will facilitate meetings and support the group as required.

The role, functions and membership of the Working Group will be reviewed by the Group as required.

Members are automatically covered under the terms and conditions of Council's Public Liability and Professional Indemnity policies, provided they act within the scope of their duties as a member of the DVWG.

MEETING GUIDELINES

The DVWG will meet monthly or at a frequency agreed by members.

Meetings will be held during business hours at the paranaple centre, 137 Rooke Street, Devonport, or at other suitable locations.

Members who cannot attend a meeting should tender an apology in advance of the meeting; or may arrange for a substitute from their organisation to attend on their behalf.

Meeting outcomes will be recorded and circulated no later than five working days after the meeting to:

- DVWG members
- Devonport City Councillors and relevant Council Officers.

RESPONSIBILITY

Responsible Manager

Community Services Manager

Document Controller

Community Projects Officer

AUTHORISATION

Endorsed By Council

xx

Review Date

August 2024

Devonport City Council

Retail Study

Ethos Urban

Prepared for Devonport City Council

5 August 2022

Authorship

Report stage	Author	Review	Date
Draft report	Ellis Davies Emma Keller	Nick Brisbane	29 June 2022
Final report			5 August 2022

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Contents

Executive Summary

Retail Study Context

1 A comprehensive Retail Study was undertaken for Council in 2008, which explored the importance of retailing as an economic activity in Devonport and investigated where future retail facilities should be provided. Since 2008 Devonport has experienced strong population growth, which has driven new commercial and retail development in the area.

2 Ethos Urban has been commissioned to undertake a new Retail Study to assist Devonport City Council in gaining an understanding of the current retail landscape of Devonport, and to identify the most appropriate future retail development opportunities to serve the needs of the growing community.

3 A current Retail Study will assist Council in guiding and encouraging appropriate retail development throughout Devonport to ensure the retail sector can meet the needs of local residents as well as visitors to the area.

Economic and Policy Overview

4 The agriculture, forestry and fishing (14.4%), health care and social assistance (11.9%) and construction (9.3%) industries were the main contributors to the Devonport Region's Gross Regional Product in 2021. The 'Devonport Region' is defined as the combination of the municipalities of Devonport, Kentish, Central Coast and Latrobe.

5 ABS Census data shows that the major economic sectors in which Devonport residents are employed are health care and social assistance (14.9%), retail trade (13.1%) and manufacturing (10.0%).

6 Devonport's tourism sector plays a key role in the local and regional economy for Tasmania. Hosting the Spirit of Tasmania ferry, Devonport is a popular gateway to north-west Tasmania and beyond, including major tourism attractions such as Cradle Mountain. In 2019, with this year being a pre-COVID business-as-usual benchmark, Devonport attracted a total of approximately 184,000 domestic overnight visitors and 343,430 day trips to the region. There were a further 15,280 international visitors spending a total of 319,000 nights in the area.

7 A number of macro trends are currently influencing the land use composition and viability of retail facilities, including shifts in demographics, changing consumer preferences, the growth of online and impacts from the COVID-19 pandemic.

8 Devonport's LIVING CITY is the largest urban renewal project undertaken in regional Tasmania and is transforming Devonport by creating a cultural heart, opening the city up to the waterfront, and further establishing the city as a key destination for business activity and visitors. Northern areas of the CBD, being the new retail precinct, civic precinct and waterfront, are seeing the greatest change from LIVING CITY, with ongoing development occurring in this area. This includes the new multi-purpose civic building, the Paranaple Centre, which hosts a library, customer service centre, council offices, and a conference centre, as well as construction of the waterfront precinct.

Retail Catchment Analysis

9 A retail catchment has been defined which includes the municipalities of Devonport, Latrobe, Kentish and Central Coast. The combination of these areas is referred to as the Devonport Retail Catchment.

10 In mid-2021, the population of Devonport Retail Catchment is estimated at 69,700 persons including 26,900 residents in the City of Devonport. Future growth in the Devonport Retail Catchment is projected to result in the population reaching 76,900 residents by 2036 including 28,800 persons in the City of Devonport.

11 The total retail spending capacity of the Devonport Retail Catchment population is estimated at $939 million in 2021, including $431 million of FLG spending. Retail spending is projected to increase strongly over the forecast period to reach $1.18 billion at 2036, including $544 million of FLG spending.

Consultation

12 High-level consultation with key stakeholders, as identified by the City of Devonport, found that the Devonport CBD is generally considered an effective hub for retail activity, though the built form, quality of some shops, level of on-grade carparking and promotion activity could be improved. In the future, stakeholders discussed the need for additional retail facilities to serve the growing community, particularly additional large format retail uses and neighbourhood centres outside of the CBD.

Hierarchy of Retail Centres

13 In total there is an estimated 84,840 sq.m of occupied retail floorspace across the various centres in Devonport. Close to half is provided within, or near, the Devonport CBD, while the other largest centres in terms of retail floorspace are Devonport Homemaker Centre, Don Road and Fourways.

14 According to retail survey there was a total of 3,480 sq.m of vacant shopfront floorspace which would be suitable for retail uses. This reflects a vacancy rate of 3.9%, which is considered low and healthy for a regional city. However, some centres have vacancy rates over 10.0%, including Devonport East Village, Fourways and Forbes Street, which should be closely monitored to ensure the level of vacancy does not increase further.

15 Since 2008, the amount of retail floorspace in Devonport has increased by an estimated 22,200 sq.m. Some of the most notable changes include the development of the Devonport Homemaker Centre and additional retail uses on the fringe of the CBD including Hill Street Grocer and some new large format retail outlets.

Retail Turnover and Demand Analysis

16 Total turnover at all retail facilities in the City of Devonport is estimated at $504.5 million, including an estimated $295.8 million in retail turnover at shops located in the Devonport CBD and surrounds.

17 Retail outlets in the City of Devonport generate approximately $295.4 million of retail turnover which can be attributed to residents in the municipality, representing approximately 59% of total retail sales in Devonport. The balance, or 41% of retail turnover in Devonport, is estimated to be derived from spending by non-residents.

18 As at 2021 escape spending by Devonport residents is estimated at $60 million. In order words, $60 million of retail expenditure of residents in Devonport is expected to be directed to retail facilities located outside Devonport. This represents approximately 17% of the total available retail spending by residents of Devonport. This estimated level of escape spending is considered to be in line with expectations of a dynamic retail sector, with the current provision of retail facilities able to largely meet the needs of the local community.

19 An analysis of retail floorspace demand indicates that there is a current shortfall of retail floorspace in the order of 10,000 sq.m in Devonport. This indicates that the scale of retail

floorspace in Devonport broadly meets the needs of customers, though there is potential for some additional retail floorspace to be supported.

20 An analysis of future retail floorspace need created by population growth finds that there is the potential need for a further approximately 24,000 sq.m of retail floorspace in Devonport at 2036 to effectively serve the needs of residents and visitors. This includes the current retail floorspace demand as well as demand which will be generated in the period to 2036, assuming no retail facilities are developed over the forecast period.

21 There is considered to be an opportunity for a new full-line supermarket, additional food & beverage outlets, some non-food/convenience retail shops and more large format retail stores to serve the needs of the local community and visitors.

National Retailer Gap Analysis

22 An analysis of key national retailers, their presence or otherwise in Devonport, and their presence or otherwise in regional cities of a similar scale to Devonport has been completed, resulting in a broad guide of the types of retailers that could potentially be supported in Devonport.

Strategic Direction for Devonport Retailing

23 Devonport is an important regional centre serving a large rural and semi-rural hinterland, with the retail sector performing an important role in ensuring that Devonport acts as the retail and business hub serving north-western Tasmania.

24 Retailing provides vital economic activity which contributes to jobs and incomes, and has an important social role in the delivery of goods and services. It also contributes to the built environment and can provide an important sense of place for the community.

25 Key recommendations to assist Council in guiding retail development in Devonport include:

- Continue to support the primacy of the Devonport CBD.
- Better define a retail centre hierarchy for Devonport.
- Support appropriate retail development.
- Promote development which consolidates activity in established centres and reduces fragmentation.
- Support the ongoing operation and evolution of all activity centres in Devonport.
- Assess major retail development applications against appropriate criteria, including for developments outside established centres.

1 Retail Study Context

Background

Devonport is a regional city located on the northern coast of Tasmania. The Devonport municipality had a residential population of approximately 26,000 in 2021. Being the third largest urban centre in Tasmania, Devonport serves a relatively broad region that includes surrounding towns such as Port Sorell, Penguin and Sheffield. The city provides a broad range of retail, commercial, community, entertainment and leisure facilities, and acts as the business hub for north-west Tasmania.

A comprehensive Retail Study was undertaken for Council in 2008, which explored the importance of retailing as an economic activity in Devonport and investigated where future retail facilities should be provided. The 2008 Retail Study provided a number of strategic directions for retailing in Devonport and was well received by Council at the time. It was completed by Essential Economics (now trading as Ethos Urban).

Since 2008 Devonport has experienced strong population growth, which has driven new commercial and retail development in the area. In particular, in 2013 Devonport City Council unveiled LIVING CITY, which is the largest urban renewal project in regional Tasmania. LIVING CITY is transforming Devonport through the creation of new retail, business and waterfront precincts, with a focus on tourism, arts, food and services.

Ethos Urban has been commissioned to undertake a new Retail Study to assist Devonport City Council in gaining an understanding of the current retail landscape of Devonport, and to identify the most appropriate future retail development opportunities to serve the needs of the growing community.

Need for Updated Retail Study

There are numerous reasons why it is important for the City of Devonport to have an up-to-date Retail Study, some of which are as follows:

- Retailing is a major industry in the Devonport economy which employs a large number of people directly and also creates employment in a wide range of supporting industries.
- Retail meets the needs of the community in relation to the provision of the goods and services essential to the function of a modern society, from basic supplies such as bread and milk, through to more discretionary needs such as fashion and electronic equipment.
- Retail plays an important role in influencing the way people use cities and towns. A high quality and well-functioning built environment – including retail shops – contributes significantly to quality of life, community pride and a range of other benefits to the community and business sectors.
- Retail facilities are used extensively by tourists and other visitors, and perceptions of Devonport are to a large degree affected by the relative attractiveness and vibrancy of its shopping facilities.

A current Retail Study will assist Council in guiding and encouraging appropriate retail development throughout Devonport to ensure the retail sector can meet the needs of local residents as well as visitors to the area.

Objectives

The key objective of this updated Retail Study is to examine the current retail landscape of Devonport and assess how effectively the existing facilities are meeting the needs of customers. It needs to examine the latest retail industry trends and build on the previous study to provide new insights and recommendations based on the latest data and market trends.

Approach

The approach taken to meet the study objectives consists of the following key tasks:

- Review the previous 2008 Retail Strategy and all other relevant literature.
- Update of the key economic data for the Devonport municipality.
- Outline the key trends in the retail sector.
- Undertake an audit of all existing retail facilities in Devonport and investigate all proposed retail developments.
- Undertake high-level consultation with key stakeholders as identified by Council.
- Define a Retail Catchment as an appropriate area for analysing key metrics.
- Analyse the current and forecast population levels, the socio-demographic profile and spending trends in the Retail Catchment.
- Prepare retail economic analysis for the Retail Catchment including analysis of retail floorspace demand compared with current retail provision, escape spending, and future retail development potential.
- Undertake a retail gap analysis to identify retailers that typically have a presence in other similar sized regional cities but are not located in Devonport.
- Provide a number of strategic directions to assist Council in guiding future retail development in Devonport.

Report Structure

This report contains the following chapters:

Chapter 1:	Retail Study Context
Chapter 2:	Economic and Policy Overview
Chapter 3:	Retail Catchment Analysis
Chapter 4:	Consultation
Chapter 5:	Hierarchy of Retail Centres
Chapter 6:	Retail Turnover and Demand Analysis
Chapter 7:	National Retailer Gap Analysis
Chapter 8:	Strategic Direction for Devonport Retailing
Chapter 9:	Conclusion
Appendix	

2 Economic and Policy Overview

This Chapter provides an overview of key economic data as well as discusses the planning scheme and other relevant polices.

2.1 Regional Economic Overview

In this Chapter the 'Devonport Region' is defined as the combination of the municipalities of Devonport, Kentish, Central Coast and Latrobe. This region corresponds to the Devonport Retail Catchment as discussed later in this study and as shown in Figure 3.1.

Gross Regional Product (GRP) is a useful indicator to measure the value of economic activity in an area. In 2021, the total amount of GRP generated in the City of Devonport is estimated at $1.79 billion. This represents over half of the GRP generated across the Devonport Region ($3.54 billion), as shown in Table 2.1. Overall, the Devonport Region contributed 10.2% of Tasmania's Gross State Product (GSP) in 2021.

The agriculture, forestry and fishing (14.4%), health care and social assistance (11.9%) and construction (9.3%) industries were the main contributors to the Devonport Region's Gross Regional Product in 2021. These were followed by the manufacturing (7.9%) and transport, postal and warehousing (5.4%) industries. Tables 2.1 and 2.2 show a summary of the share of economic activity generated for each municipality in the Devonport Region relative to the Tasmanian GSP figure.

Table 2.1: Gross Regional Product, Devonport Region and Tasmania, 2020/21

GRP current prices ($m)	Devonport	Kentish	Central Coast	Latrobe	Devonport Region	Tasmania
Agriculture, Forestry and Fishing	120	80	160	150	510	3,470
Mining	10	10	0	20	40	1,410
Manufacturing	120	30	60	70	280	1,890
Electricity, Gas, Water and Waste Services	70	10	20	0	100	990
Construction	180	20	90	40	330	2,310
Wholesale Trade	60	0	30	20	110	950
Retail Trade	100	10	40	20	170	1,590
Accommodation and Food Services	30	10	20	10	70	720
Transport, Postal and Warehousing	130	10	20	30	190	1,390
Information Media and Telecommunications	40	0	10	0	50	1,080
Financial and Insurance Services	70	0	10	0	80	1,660
Rental, Hiring and Real Estate Services	30	0	10	10	50	540
Professional, Scientific and Technical Services	40	0	20	10	70	1,070
Administrative and Support Services	30	0	10	10	50	570
Public Administration and Safety	70	0	30	20	120	2,270
Education and Training	90	10	40	30	170	2,020
Health Care and Social Assistance	180	10	120	110	420	4,530
Arts and Recreation Services	10	0	10	0	20	320
Other Services	40	0	20	10	70	540
Gross Regional Product	**1,790**	**230**	**870**	**650**	**3,540**	**34,850**

Source: Ethos Urban; ABS Australian National Accounts

Table 2.2: Gross Regional Product, Devonport Region (%)

GRP current prices ($m)	Devonport	Kentish	Central Coast	Latrobe	Devonport Region	Tasmania
Agriculture, Forestry and Fishing	6.7%	34.8%	18.4%	23.1%	14.4%	10.0%
Mining	0.6%	4.3%	0.0%	3.1%	1.1%	4.0%
Manufacturing	6.7%	13.0%	6.9%	10.8%	7.9%	5.4%
Electricity, Gas, Water and Waste Services	3.9%	4.3%	2.3%	0.0%	2.8%	2.8%
Construction	10.1%	8.7%	10.3%	6.2%	9.3%	6.6%
Wholesale Trade	3.4%	0.0%	3.4%	3.1%	3.1%	2.7%
Retail Trade	5.6%	4.3%	4.6%	3.1%	4.8%	4.6%
Accommodation and Food Services	1.7%	4.3%	2.3%	1.5%	2.0%	2.1%
Transport, Postal and Warehousing	7.3%	4.3%	2.3%	4.6%	5.4%	4.0%
Information Media and Telecommunications	2.2%	0.0%	1.1%	0.0%	1.4%	3.1%
Financial and Insurance Services	3.9%	0.0%	1.1%	0.0%	2.3%	4.8%
Rental, Hiring and Real Estate Services	1.7%	0.0%	1.1%	1.5%	1.4%	1.5%
Professional, Scientific and Technical Services	2.2%	0.0%	2.3%	1.5%	2.0%	3.1%
Administrative and Support Services	1.7%	0.0%	1.1%	1.5%	1.4%	1.6%
Public Administration and Safety	3.9%	0.0%	3.4%	3.1%	3.4%	6.5%
Education and Training	5.0%	4.3%	4.6%	4.6%	4.8%	5.8%
Health Care and Social Assistance	10.1%	4.3%	13.8%	16.9%	11.9%	13.0%
Arts and Recreation Services	0.6%	0.0%	1.1%	0.0%	0.6%	0.9%
Other Services	2.2%	0.0%	2.3%	1.5%	2.0%	1.5%
Gross Regional Product	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Ethos Urban; ABS Australian National Accounts

2.2 Labour Market Overview

This section assesses key labour market indicators such as labour force, unemployment and industry of employment. For these indicators, the City of Devonport is benchmarked against other municipalities in the Devonport Region and State-wide averages.

Labour Force

The labour force is defined to include residents aged 15 to 64 years who are in paid employment (employed persons), and those actively seeking work (unemployed persons). Labour force data for the Devonport Region LGAs have been collected from the National Skills Commission which produces quarterly Small Area Labour Markets (SALM) estimates.

Over the last 10 years, the Devonport Region labour force expanded from 29,340 persons in 2011 to 30,430 persons in 2021, representing total growth of +1,090 persons at a rate of +0.4% per annum, as shown in Table 2.3. The Latrobe municipality has been a key driver of employment growth in this region since 2011, contributing 78.9% of the total growth in the region, growing at +1.7% per annum.

In contrast, the City of Devonport's labour force grew by an estimated +20 persons between 2011 and 2021, after declines between 2016 and 2021. Kentish and Central Coast also experienced declines throughout the same period, although also remain higher than 2011 levels.

Table 2.3: Total Labour Force, 2011 to 2021

Year ending Dec	2011	2016	2020	2021	Change (2011 to 2021)	Annual Average Growth (%)
Devonport	11,490	11,830	11,360	11,510	+20	+0.0%
Latrobe	4,810	5,460	5,600	5,670	+860	+1.7%
Kentish	2,820	3,000	2,860	2,900	+80	+0.3%
Central Coast	10,220	10,700	10,220	10,350	+130	+0.1%
Devonport Region	**29,340**	**30,990**	**30,040**	**30,430**	**+1,090**	**+0.4%**
Tasmania	257,300	258,420	275,600	273,960	+16,660	+0.6%

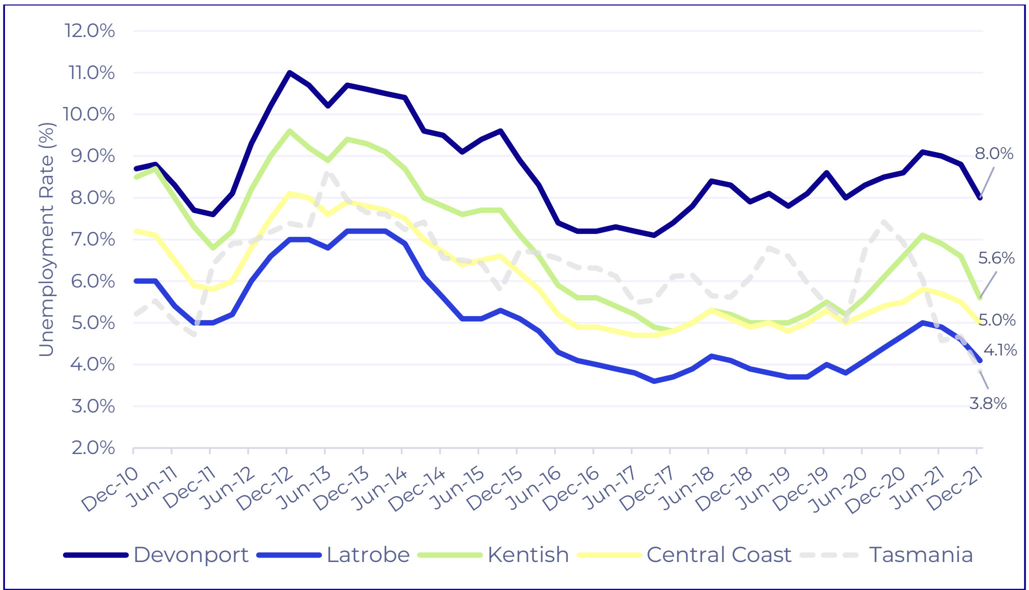
Source: SALM; ABS Labour Force; Ethos Urban

Unemployment Rate

The unemployment rate in the City of Devonport has declined from a peak of 11.0% in December 2012 to 8.0% in December 2021; however, it remains higher than the remaining Devonport Region municipalities and Tasmania.

Figure 2.1 displays how the Devonport Region municipalities have continued a similar trend over the past ten years while the unemployment rate for Tasmania differs. In December 2021, Latrobe had the lowest unemployment rate after supporting the largest increases to its labour force compared to the other municipalities, while Central Coast (5.0%) and Kentish (5.6%) unemployment rates remain higher.

Figure 2.1: Unemployment Rate, 2011 to 2021



Source: SALM; ABS Labour Force; Ethos Urban

Industry of Employment – Labour Force

ABS Census data for 2016 (the latest data available with employment data from the 2021 Census to be released in October 2022) shows that the major economic sectors in which Devonport residents are employed are health care and social assistance (14.9%), retail trade (13.1%) and manufacturing (10.0%). Other sectors that provide notable employment opportunities for Devonport's residents are education and training (8.7%), construction (8.4%) and transport, postal and warehousing (7.4%). These figures relate to employment by Devonport residents in any location including the surrounding municipalities.

When compared with Tasmanian averages, Devonport residents are employed in greater proportions in the manufacturing; transport, postal and warehousing; and mining industries, and are employed less in information media and telecommunications; public administration and safety; and arts and recreation services. This data is outlined in Table 2.4.

Table 2.4: Labour Force Devonport and Tasmania

Category	City of Devonport		Tasmania	
	No.	% Share	No.	% Share
Primary Sector				
Agriculture, Forestry and Fishing	470	5.3%	11,380	5.7%
Mining	140	1.6%	2,220	1.1%
Sub-Total	**610**	**6.9%**	**13,600**	**6.8%**
Secondary Sector				
Construction	740	8.4%	16,440	8.2%
Manufacturing	890	10.0%	14,860	7.4%
Sub-Total	**1,630**	**18.4%**	**31,300**	**15.6%**
Tertiary Sector				
Producer Services				
Electricity, Gas, Water and Waste Services	120	1.4%	3,510	1.7%
Financial and Insurance Services	140	1.6%	4,540	2.3%
Information Media and Telecommunications	70	0.8%	2,930	1.5%
Rental, Hiring and Real Estate Services	140	1.6%	2,680	1.3%
Transport, Postal and Warehousing	660	7.4%	9,150	4.6%
Wholesale Trade	270	3.0%	4,840	2.4%
Sub-Total	**1,400**	**15.8%**	**27,650**	**13.8%**
Consumer Services				
Accommodation and Food Services	740	8.4%	16,540	8.2%
Administrative and Support Services	310	3.5%	6,400	3.2%
Arts and Recreation Services	120	1.4%	4,020	2.0%
Education and Training	770	8.7%	20,100	10.0%
Health Care and Social Assistance	1,320	14.9%	30,680	15.3%
Professional, Scientific and Technical Services	350	4.0%	10,210	5.1%
Public Administration and Safety	450	5.1%	16,960	8.4%
Retail Trade	1,160	13.1%	23,600	11.7%
Sub-Total	**5,220**	**58.9%**	**128,510**	**63.9%**
Sub-Total Tertiary Sector	**6,620**	**74.7%**	**156,160**	**77.7%**
Total	**8,860**	**100.0%**	**201,060**	**100.0%**

Source: ABS; Ethos Urban

Tourism

Devonport's tourism sector plays a key role in the local and regional economy for Tasmania. Hosting the Spirit of Tasmania ferry, Devonport is a popular gateway to north-west Tasmania and beyond, including major tourism attractions such as Cradle Mountain.

Detailed tourism data for the Devonport SA2 is sourced from Tourism Research Australia and summarised in Table 2.5. In 2019, with this year being a pre-COVID business-as-usual benchmark, Devonport attracted a total of approximately 184,000 domestic overnight visitors and 343,430 day trips to the region. There were a further 15,280 international visitors spending a total of 319,000 nights in the area.

With international borders closed and severe lockdowns in Victoria, tourism visitation in Devonport took a significant hit in 2020 and 2021, although it is expected tourism will see a return to pre-COVID levels with the continued lessening of COVID restrictions.

Table 2.5: Visitors to Devonport SA2, 2016 to 2021 (year ending December)

Devonport SA2	2016	2017	2018	2019	2020	2021
Domestic						
Daytrips	410,210	337,400	351,220	343,430	306,470	306,910
Overnight	206,050	163,670	181,880	184,000	85,220	100,780
Total Domestic Visitors	**616,260**	**501,070**	**533,100**	**527,430**	**391,690**	**407,690**
Domestic Visitor Nights	676,260	565,190	385,950	507,880	209,870	286,810
International						
International Visitors	14,700	11,290	15,720	15,280	3,560	-
International Visitor Nights	151,310	199,030	232,310	319,010	29,730	-

Note: data for 2020 and 2021 were impacted by travel restrictions due to the COVID-19 pandemic.

Source: Tourism Research Australia; Ethos Urban

2.3 Property Trends

Residential property price and sales trends have been analysed for the City of Devonport using data from Pricefinder.

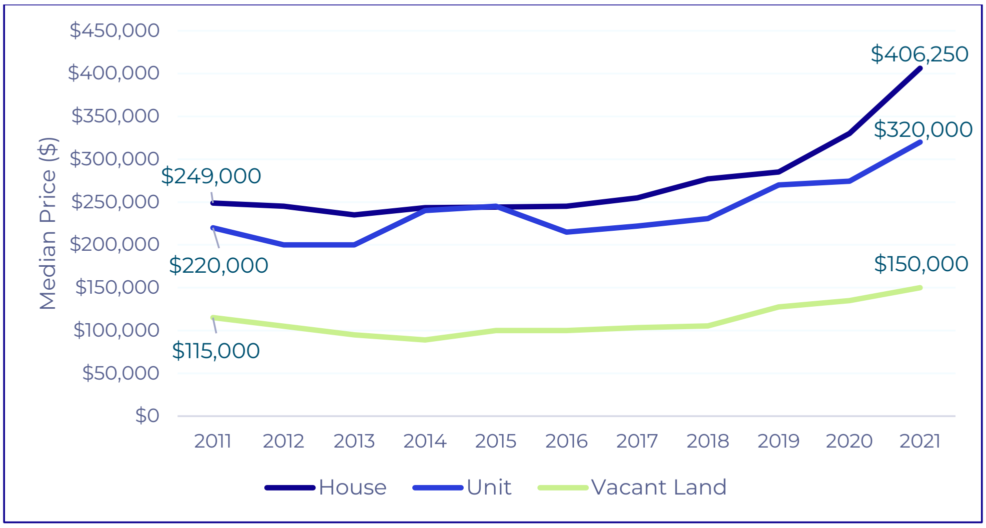
Median house prices experienced relatively flat growth between the years 2011 and 2019, growing at an average annual rate of 1.7% from $249,000 to $285,000 (refer Figure 2.2). Since 2019, the City of Devonport has experienced renewed interest and growth in the residential market, growing at an annual average rate of 19.4% to $406,250 in 2021. Consistent with median house prices, the City of Devonport has experienced a strong uplift in the number of house sales, with sales in 2020 and 2021, averaging 100 more sales than the historic average over the last ten years (refer Figure 2.3).

Similarly, median prices for units and vacant land have followed comparable patterns to median house prices, albeit to a lesser extent. In 2021, the median unit price in the City of Devonport was $320,000 having increased from $220,000, while sales have averaged 100 units per annum over the last 10 years.

Growth in vacant land has been more subdued relative to housing and units. Historic vacant land growth has averaged 2.7% between 2011 and 2021, although since 2019 has accelerated to 8.5% per annum reaching a current median price of $150,000.

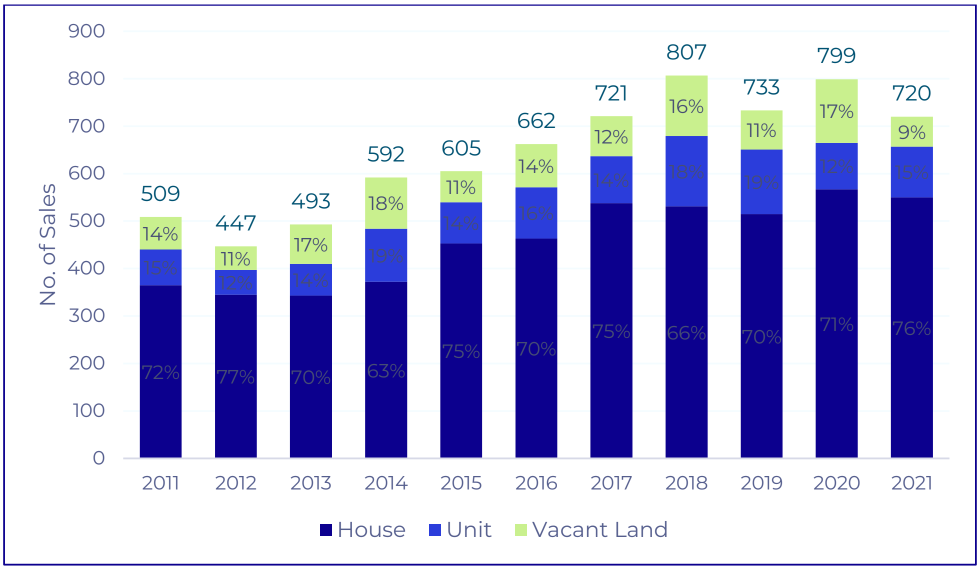
The demand for housing in Devonport has resulted in a significant shortage of rental stock. Residential vacancy rates in the postcode of 7310 have averaged around 0.2% since August 2020 and was 0.2% in April 2022 (refer Figure 2.4). The Postcode of 7310 covers a range of suburbs including Devonport, East Devonport, Aberdeen, Forth, Spreyton, Wilmot and Moina.

Figure 2.2: Median Property Prices, City of Devonport (year ending December)



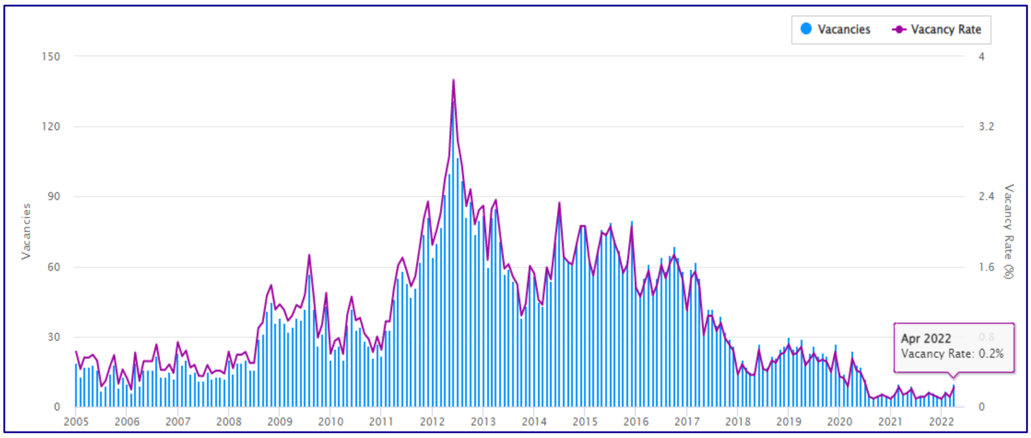
Source: Pricefinder; Ethos Urban

Figure 2.3: Number of Property Sales, City of Devonport (year ending December)



Source: Pricefinder; Ethos Urban

Figure 2.4: Residential Vacancy Rates, Suburb of Devonport



Source: SQM Rearch; Ethos Urban

2.4 Retail Sector Trends

Current macro trends influencing the land use composition and viability of retail facilities are summarised as follows.

Demographic Shifts

Demographic changes remain a factor that influences the shopping behaviour of Australian consumers and the function of retail shops and activity centres. In particular:

- **An aging population** is driving demand for certain uses (i.e. health and medical).
- **Millennials (or Generation Y – people born between 1982 and 1994)** are a key target for incumbent retail brands and new innovative formats, and a driver of online and digital retailing trends.
- **Increased labour force participation** is driving increased demand for convenience shopping, extended shopping hours, and accessible mixed-use centres.
- **Reduced household size (persons per household)** is resulting in centres having a dual role as a place for social interaction and for the purchase of goods and services.
- **Historically high levels of household debt** have increased sensitivity to interest rate movements with implications for discretionary spending levels.
- **An increasingly diverse ethnic base** is contributing to a wider diversity of consumer tastes.

A Challenging Retail Environment

Prior to COVID-19, rapid growth in online shopping channels (for example Amazon) combined with limited growth in discretionary spending was eroding the performance of traditional bricks and mortar retail, particularly for non-food outlets. As a result, a range of established global and national retailer brands collapsed, entered receivership/administration or significantly reduce in size, including:

- Seafolly – entered voluntary administration in June 2020
- Jeans West – entered voluntary administration

- Bose – announced they would shut all retail stores in Australia and focus on sales online
- EB Games – closed 19 stores in January 2020
- Bardot – entered voluntary administration in November 2019
- Harris Scarfe – entered receivership in December 2019
- Ed Harry – entered voluntary administration in January 2019

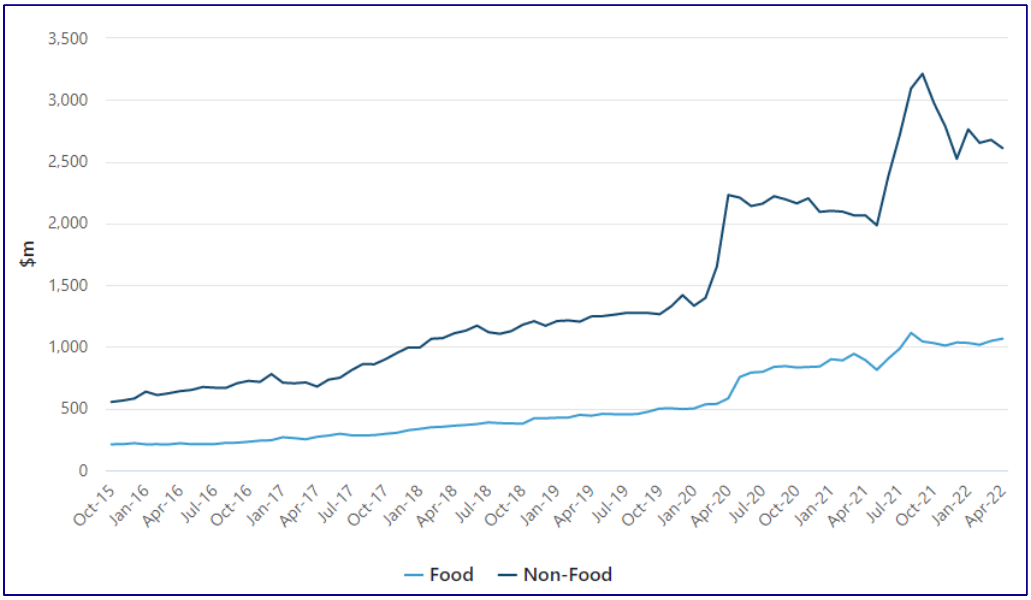
This has led to changes in the retail sector including the need to re-evaluate leasing strategies, and a re-mixing of some activity centres away from their traditional strengths. For example, the share of apparel stores has declined in many centres due to competition from online retailers.

COVID-19 Accelerates Use of Online Platforms

Pre COVID-19, the increasing use of online platforms meant many retailers were investing heavily in their online presence and transitioning their businesses to an 'omni channel' offering, with online platforms and bricks and mortar stores operated in a complementary manner. A common example of this is the so-called 'click and collect' capabilities now implemented by many retailers including major supermarkets.

COVID-19 supercharged the take-up of online retailing. Due to working from home and social distancing, people had a direct incentive to increase online spending. As a result, the share of online retail turnover (seasonally adjusted) in Australia reached a high of 15.3% in September 2021, before dropping to 10.0% as at April 2022. This is still substantially higher than the pre COVID-19 level of 6.3% as at January 2020. Figure 2.5 details the total online food and non-food retail sales as measured by the ABS.

Figure 2.5: Food and Non-Food Online Sales (Seasonally Adjusted)



Source: ABS Retail Trade (April 2022 release)

The rapid change in consumer behaviour generated by COVID-19 has also delivered flow-on effects including:

- **'Omni channel' retailing now expected**. Consumers are expecting that their favourite brands provide omni channel options and are prepared to move away from those that do not.
- **Retailers and Activity Centres are focusing on the 'experience'.** The convenience afforded by online platforms means that activity centres cannot rely on drawing patronage on a purely transactional basis. Now, the success of activity centres is increasingly tied to the ability to deliver a positive customer experience relating to:
  - **Store experience** – the quality of the store fit-out, customer amenity and standard of service; and
  - **Place experience** – the attractiveness of the overall centre environment. Key trends include:
    a **The emergence of blended use development** whereby different uses (retail, commercial office, health/medical, gyms etc) are supported in the same building

    b **Establishment of complementary non-retail uses** such as medical centres, gyms, and co-working space for multi-function activity centres

    c **Supporting entertainment uses in larger centres** to drive after-hours activity such as bars, restaurants, cinemas, bowling alleys etc.

    d **Renewed focus on the importance of marketing** and particularly 'place branding' initiatives that promote the point of difference of a place or centre to attract new customers.

2.5 Devonport Strategic Plan 2009-2030

The Devonport Strategic Plan 2009-2030 was developed in conjunction with Council, the community, and key stakeholders, and outlines how Council plans to achieve its vision for Devonport, with this vision being to become "*a thriving and welcoming regional City living lightly by river and sea*".

Goal 2 under the plan recognises the goal to build a unique city, including to facilitate appropriate property use and development, and to promote the development of the CBD in line with the principles of the LIVING CITY Principles Plan.

Goal 3 in the plan intends to grow a vibrant economy for Devonport, including recognising Devonport as the business, service, and retail centre for north-west Tasmania.

2.6 Devonport LIVING CITY Masterplan

Devonport's LIVING CITY is the largest urban renewal project undertaken in regional Tasmania and is transforming Devonport by creating a cultural heart, opening the city up to the waterfront, and further establishing the city as a key destination for business activity and visitors.

The LIVING CITY Masterplan was developed in 2014 to support this vision. The Masterplan recognises a number of precincts in the CBD, including a new retail precinct, civic precinct, waterfront, Rooke Street Mall, and business and professional precinct.

Northern areas of the CBD, being the new retail precinct, civic precinct and waterfront, are seeing the greatest change from LIVING CITY, with ongoing development occurring in this area. This includes the new multi-purpose civic building, the Paranaple Centre, which hosts a library, customer service centre, council offices, and a conference centre, as well as construction of the waterfront precinct.

At completion, the LIVING CITY project will create a high-quality live-work-play environment. It will result in a connected CBD, with links to the Mersey River and across existing retail and businesses, and will enable the CBD. to capture a greater number of tourist dollars. The aim is for Devonport to become a key destination and a regional centre for north-west Tasmania.

2.7 Tasmanian Planning Scheme

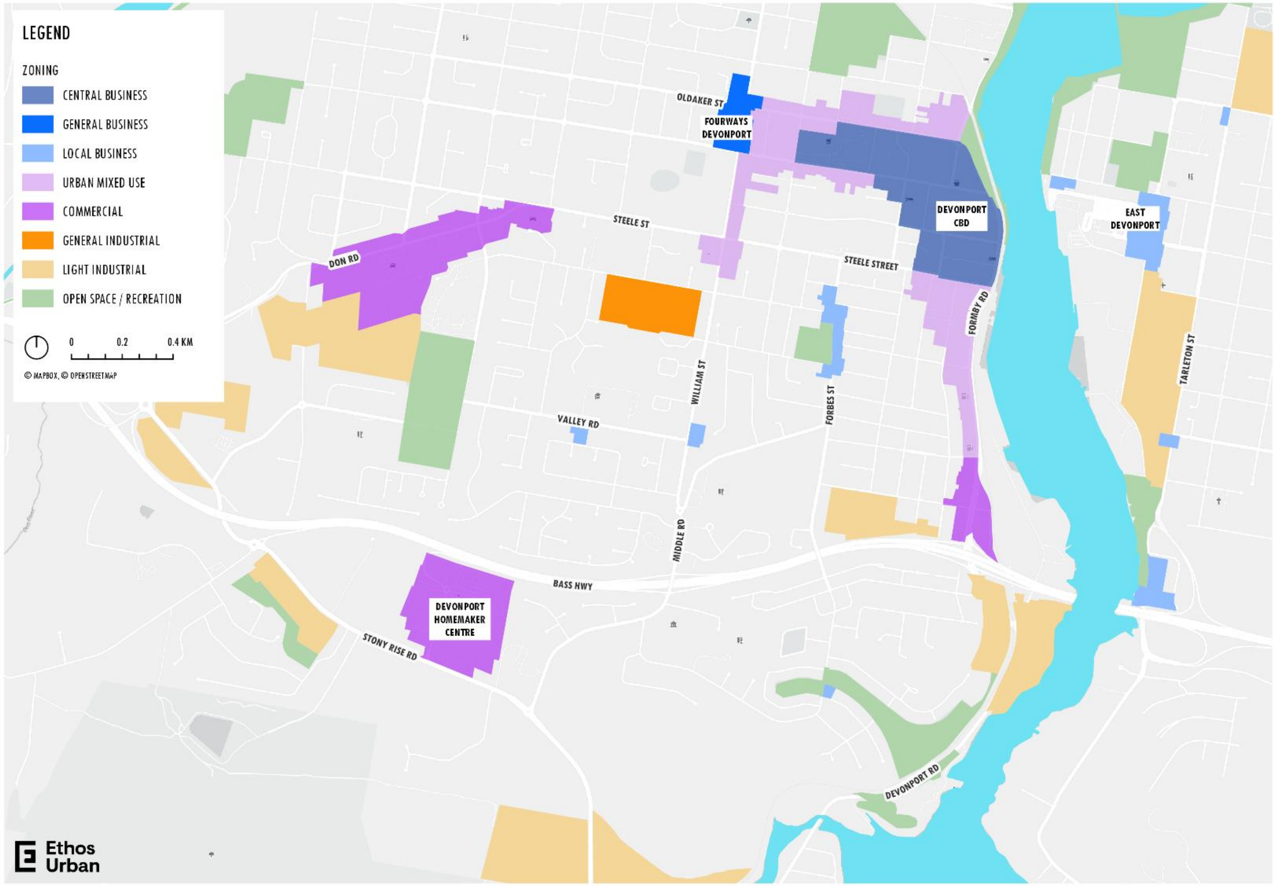
The Tasmanian Planning Scheme controls use and development of land throughout Tasmania, including in the Devonport municipality, through the application of zones, codes and various provisions. The key zones supporting the development of retail uses are as follows:

- **Central Business:** applies to primary centres throughout Tasmania, including the Devonport CBD. This zone allows for the concentration of higher order business, retail, administrative, professional, community, and entertainment functions.
- **General Business:** supports business, retail, administrative, professional, community, and entertainment functions for the main suburban and rural centres in Tasmania, including William Street (Fourways) in Devonport.
- **Local Business:** applies to centres supporting local areas, including Forbes Street in Devonport and East Devonport Village.
- **Urban Mixed Use:** provides for a mix of uses in urban locations, including residential, retail, community services, and commercial activities. In Devonport this zone applies particularly to areas to the north-west and south of the CBD.
- **Commercial:** supports retailing, service industries, storage and warehousing requiring large floor and outdoor areas, and high levels of vehicle access and parking. This zone applies to Don Road and the Homemaker Centre in Devonport.

There are also some lower order retail locations throughout Devonport's residential zones, providing very basic convenience retail to their immediate populations.

The zoning for the wider Devonport area is shown in Figure 2.6.

Figure 2.6: Devonport Land Zones



Source: Tasmanian Planning Scheme; Ethos Urban

2.8 Summary and Implications

- The Devonport Region has a diverse economy with Agriculture, Forestry & Fishing; Health Care & Social Assistance; and Construction being some of its key industries.
- Devonport's tourism sector plays a key role in the local economy which benefits from the presence of the Spirit of Tasmania terminal.
- The retail sector is constantly evolving reflecting an ongoing shift in demographics, changing consumer preferences, the growth of online and the impacts from the COVID-19 pandemic.
- Devonport's LIVING CITY is the largest urban renewal project undertaken in regional Tasmania. It is transforming Devonport by creating a cultural heart and opening the city up to the waterfront.
- The key zones in the Tasmanian Planning Scheme supporting the development of retail uses include Central Business, General Business, Local Business, Urban Mixed Use and Commercial.

3 Retail Catchment Analysis

This Chapter provides analysis of the catchment most relevant for retailing in the City of Devonport.

3.1 Retail Catchment Definition

It is important to recognise that the retail sector in Devonport operates in a regional context and that retailers in Devonport serve both local residents and those coming to shop in Devonport from further afield, including tourists and other visitors.

Having regard for the relatively small geographic size of the City of Devonport and its position as a key service centre for a substantial hinterland, it is critical that the shopping needs and patterns of these residents outside the municipality are also considered when determining retail need in Devonport.

Utilising mobile ping data from Near (see Appendix for more detail), the home location of people visiting the Devonport CBD has been identified. Near data, which tracks the location of mobile phones via apps, provides a representative sample of people visiting a certain locality. In this case, the data has been used to define a Retail Catchment for Devonport, based on the home location of patrons of the Devonport CBD and the level of visitation.

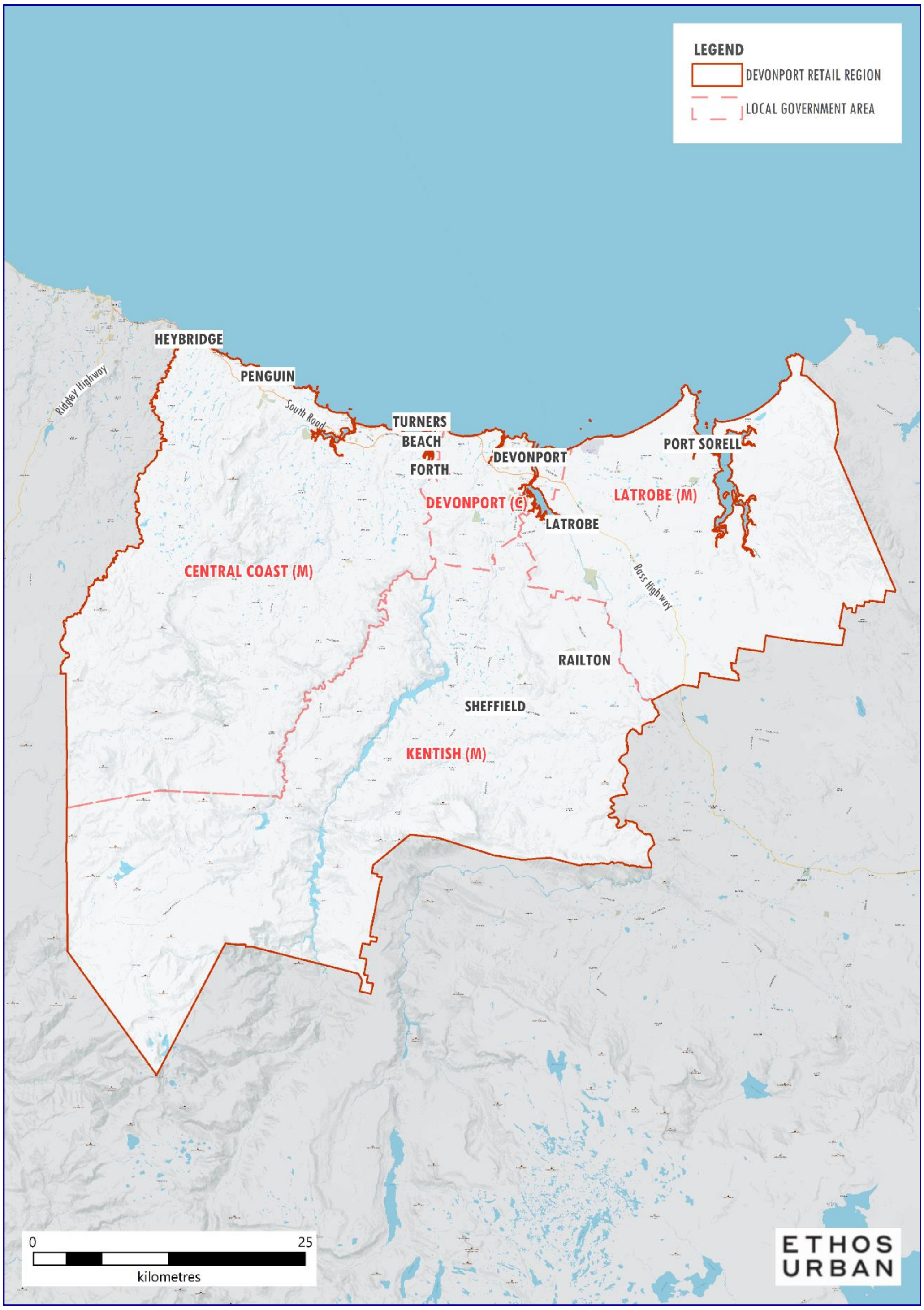
The data reveals that some 82% of visits to the Devonport CBD are from people residing in the municipalities of Devonport, Latrobe, Kentish and Central Coast. The combination of these areas is referred to as the **Devonport Retail Catchment** in this study. This analysis supports the previously identified Devonport Retail Catchment in the 2008 Retail Strategy.

The extent of the Devonport Retail Catchment is shown in Figure 3.1.

The retail sector in Devonport also has a role to play in serving tourists and other visitors to the area, in particular those utilising the Spirit of Tasmania ferry service. In this respect, many retailers in Devonport attract retail spending from visitors from across Tasmania and Australia, as well as a smaller share from international tourists (which was significantly impacted due to the COVID-19 pandemic).

It is important to appreciate that residents of the City of Devonport may spend a proportion of their retail expenditure outside the municipality; for example, in association with purchases made while at work, on holiday etc. In this regard, we note that while many employees travel to Devonport for work, a proportion of the local residents also travel outside the region for employment purposes, such as to Launceston and Burnie.

Figure 3.1: Devonport Retail Catchment



Source: Ethos Urban

3.2 Population Trends and Forecasts

The ABS 2021 Census was released in late June 2022. The data indicates that population growth in the area was higher than previously anticipated. Based on the new Census data, in mid-2021 the population of Devonport Retail Catchment is estimated at 69,690 persons including 26,920 residents in the City of Devonport.

Historic population growth has been strong in the Latrobe municipality over the years from 2016 to 2021, averaging +360 persons per annum. Development in the coastal town of Port Sorrell is driving some of this growth, which currently includes two significant residential developments – Calm Cove and Hawley Beach Estate.

After experiencing population declines between 2011 and 2016, population growth in the other municipalities rebounded with solid growth from 2016 to 2021, particularly in Devonport. This is confirmed by the number of new dwelling approvals in the area, as sourced from the ABS. Over recent years, from 2018 to 2021, the Devonport Retail Catchment has averaged approximately 410 new dwelling approvals per annum (see Table 3.2). Across the 2021 financial year, the region experienced a significant spike in new dwelling approvals, up +160 from the previous year.

In our view future growth in the Devonport Retail Catchment is projected to result in the population reaching 76,900 residents by 2036 including 28,800 persons in the City of Devonport.

The *Greater Devonport Residential Growth Strategy 2021-2041* was released by Devonport City Council in June 2022. It includes an aspirational target population of 30,000 by 2030 and 35,000 by 2040. Therefore, the projected rate of growth for Devonport adopted in this report could be considered conservative when compared with the aspirations of Council. It is considered important that a study such as this generally adopts a more conservative approach to ensure that the need for additional retail floorspace in the area is not overstated.

Historic population levels for the Devonport Retail Catchment have been estimated by using ABS Estimated Resident Population (ERP) data, which is considered the most accurate and up-to-date population data available in Australia. Population estimates to 2036 have been forecast using a range of sources including ABS New Dwellings Approval data; Nearmap Aerial Imagery; Cordell Connect; and other investigations of residential development undertaken by this office. The population estimates for the Devonport Retail Catchment from 2011 to 2036 are shown in Table 3.1.

Table 3.1: Retail Catchment Population Estimates and Projections, 2011-2036 (as at June)

Category	2011	2016	2021	2026	2031	2036
Population						
Devonport	25,750	25,130	26,920	27,420	28,020	28,820
Latrobe	10,280	10,930	12,710	13,710	14,810	16,060
Kentish	6,370	6,260	6,780	6,930	7,130	7,380
Central Coast	22,330	21,740	23,280	23,680	24,130	24,630
Devonport Retail Catchment	**64,730**	**64,060**	**69,690**	**71,740**	**74,090**	**76,890**
Average Annual Growth (no.)						
Devonport		-120	+360	+100	+120	+160
Latrobe		+130	+360	+200	+220	+250
Kentish		-20	+100	+30	+40	+50
Central Coast		-120	+310	+80	+90	+100
Devonport Retail Catchment		**-130**	**+1,130**	**+410**	**+470**	**+560**
Average Annual Growth (%)						
Devonport		-0.5%	+1.4%	+0.4%	+0.4%	+0.6%
Latrobe		+1.2%	+3.1%	+1.5%	+1.6%	+1.6%
Kentish		-0.3%	+1.6%	+0.4%	+0.6%	+0.7%
Central Coast		-0.5%	+1.4%	+0.3%	+0.4%	+0.4%
Devonport Retail Catchment		**-0.2%**	**+1.7%**	**+0.6%**	**+0.6%**	**+0.7%**

Source: ABS; Nearmap; Cordell; Ethos Urban

Table 3.2: New Residential Dwelling Approvals, 2018 to 2021 (as at June)

	2018	2019	2020	2021	Average (2018 to 2021)
Devonport	114	110	138	168	133
Latrobe	129	135	127	192	146
Kentish	22	31	33	50	34
Central Coast	82	86	78	129	94
Devonport Retail Catchment	**347**	**362**	**376**	**539**	**406**

Source: ABS Building Approvals; Ethos Urban

3.3 Socio-Economic Characteristics

Table 3.3 compares the socio-economic profile of residents in the Devonport Retail Catchment with Tasmania, as sourced from the recently released 2021 ABS Census. The main points drawn from the data for the Devonport Retail Catchment are as follows:

- **Median household income levels below the Tasmanian median.** Median household income levels across the Devonport Retail Catchment ($63,010) are -12.6% below the Tasmanian median ($72,070). The City of Devonport has the lowest median household income ($61,730) out of all municipalities in the Devonport Retail Catchment, while Latrobe Council has the highest ($65,550).

- **Older age profile**. The Devonport Retail Catchment has an older age profile (46.3 years) compared with Tasmania (41.6), with a higher proportion of the population aged over 65 years. The City of Devonport median age is the most aligned (42.4 years) with the Tasmanian average, with a strong share of the population between the ages of 20 to 34 years.

- **Family-orientated household composition aligned with the Tasmanian benchmark**. Family households comprise the majority of households in the Devonport Retail Catchment (68.0%), which is slightly above the Tasmanian benchmark (67.3%). Notably, the City of Devonport has an above average share of lone person households (31.9%), compared with the Devonport Retail Catchment (29.7%) and Tasmania (29.3%).

- **Tenure type across the Devonport Retail Catchment considerably varies across municipalities**. Most residents in the Devonport Retail Catchment own their dwelling outright or with a mortgage (74.1%) similar to the Tasmanian benchmark (71.5%), although there are substantial differences between the regions. The City of Devonport has the highest share of renters (31.9%) compared to Kentish (12.8%), Central Coast (20.5%), and Latrobe (22.6%).

The socio-demographic profile of the Devonport Retail Catchment is representative of an established regional centre, characterised by slightly lower incomes, older age structure, who on average own outright or have a mortgage on a detached dwelling.

Table 3.3: Socio-Economic Characteristics, 2021

Category	**Devonport**	**Latrobe**	**Kentish**	**Central Coast**	**Devonport Retail Catchment**	***Tasmania***
Income						
Median individual income (annual)	$32,790	$33,460	$31,640	$33,080	**$32,910**	*$37,030*
Variation from Tasmania median	*-11.5%*	*-9.6%*	*-14.6%*	*-10.7%*	***-11.1%***	*n.a.*
Median household income (annual)	$61,730	$65,550	$64,770	$62,530	**$63,010**	*$72,070*
Variation from Tasmania median	*-14.3%*	*-9.0%*	*-10.1%*	*-13.2%*	***-12.6%***	*n.a.*
Age Structure						
0-4 years	5.2%	4.5%	4.0%	4.3%	**4.6%**	*5.0%*
5-19 years	17.5%	15.8%	16.4%	16.8%	**16.9%**	*16.7%*
20-34 years	18.6%	14.4%	14.2%	15.0%	**16.2%**	*19.5%*
35-64 years	36.2%	38.0%	43.5%	38.8%	**38.1%**	*37.9%*
65-84 years	20.0%	24.8%	20.4%	22.2%	**21.6%**	*18.6%*
85 years and over	2.6%	2.6%	1.3%	2.9%	**2.6%**	*2.3%*
Median Age (years)	42.4	48.6	48.0	47.6	**46.3**	*41.6*
Country of Birth						
Australia	89.4%	90.1%	88.0%	91.2%	**90.0%**	*84.6%*
Other Major English Speaking Countries	4.9%	6.3%	7.3%	5.5%	**5.6%**	*6.2%*
Other Overseas Born	5.7%	3.6%	4.7%	3.3%	**4.4%**	*9.2%*
% speak English only at home	*94.9%*	*96.8%*	*96.6%*	*97.9%*	***96.4%***	*91.0%*
Household Composition						
Couple family with no children	28.3%	36.6%	36.7%	33.1%	**32.1%**	*30.1%*
Couple family with children	22.3%	24.0%	26.6%	24.0%	**23.6%**	*25.1%*
Couple family - total	50.6%	60.5%	63.3%	57.1%	**55.7%**	*55.2%*
One parent family	13.7%	10.0%	8.5%	11.0%	**11.7%**	*11.3%*
Family households - total	65.2%	71.2%	71.9%	68.6%	**68.0%**	*67.3%*
Lone person household	31.9%	26.9%	25.7%	29.6%	**29.7%**	*29.3%*
Group household	3.0%	1.9%	2.4%	1.7%	**2.3%**	*3.4%*
Dwelling Structure (Occupied Private Dwellings)						
Separate house	87.6%	93.6%	96.8%	90.6%	**90.5%**	*86.9%*
Semi-detached house, townhouse etc.	11.4%	5.0%	3.0%	7.8%	**8.3%**	*6.1%*
Flat, unit or apartment	0.2%	0.6%	0.0%	0.3%	**0.3%**	*6.4%*
Average household size	2.3	2.3	2.4	2.3	**2.3**	*2.4*
Tenure Type (Occupied Private Dwellings)						
Owned outright	36.0%	44.2%	48.6%	44.3%	**41.4%**	*37.8%*
Owned with a mortgage	31.2%	31.9%	37.0%	34.0%	**32.8%**	*33.7%*
Rented	31.9%	22.6%	12.8%	20.5%	**24.7%**	*26.8%*
Housing Costs						
Median monthly mortgage repayment	$1,213	$1,336	$1,269	$1,256	**$1,251**	*$1,365*
Variation from Tasmania median	*-11.2%*	*-2.1%*	*-7.1%*	*-8.0%*	***-8.3%***	*0.0%*
Median weekly rents	$250	$266	$225	$249	**$252**	*$301*
Variation from Tasmania median	-16.9%	-11.6%	-25.1%	-17.2%	**-16.4%**	*0.0%*

Source: ABS Census of Population and Housing 2021; Ethos Urban

3.4 Retail Spending Analysis

The following provides an analysis of the expected retail spending behaviour of residents in the Retail Catchment. Estimates of retail spending by residents have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey (HES), the ABS Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

The retail spending data is presented across four major spending categories:

- **Food, Liquor and Groceries (FLG)**, which includes fresh food, groceries and take-home liquor, including supermarket spending.
- **Food Catering**, which includes cafes, restaurants and takeaway food.
- **Non-Food**, which includes apparel, homewares and general merchandise.
- **Retail Services**, including hairdressers, beauty salons etc.

Estimates of average per capita retail spending in 2021 for Devonport Retail Catchment residents are shown in Table 3.4 and are compared with the average for Tasmania. Average per capita spending by residents in the Retail Catchment is estimated at $13,700 a year, which is -3.3% below the Tasmanian average. Conversely, per capita spending on FLG, the key category for supermarkets, by Retail Catchment residents is +0.5% above average for Tasmania. All spending estimates in this report are expressed including GST.

Table 3.4: Average Per Capita Retail Spending, 2021

Area	Food, Liquor and Groceries	Food Catering	Non-Food	Retail Services	Total Retail
Per Capita Spending ($2021)					
Devonport	**$6,200**	**$1,380**	**$5,480**	**$440**	**$13,500**
Latrobe	$6,420	$1,460	$5,810	$460	$14,150
Kentish	$6,310	$1,330	$5,460	$420	$13,510
Central Coast	$6,250	$1,410	$5,630	$460	$13,750
Devonport Retail Catchment	**$6,270**	**$1,400**	**$5,590**	**$450**	**$13,700**
Total TAS	*$6,240*	*$1,530*	*$5,920*	*$480*	*$14,170*
Variation from Total TAS average					
Devonport	**-0.6%**	**-9.8%**	**-7.4%**	**-8.3%**	**-4.7%**
Latrobe	2.9%	-4.6%	-1.9%	-4.2%	-0.1%
Kentish	1.1%	-13.1%	-7.8%	-12.5%	-4.7%
Central Coast	0.2%	-7.8%	-4.9%	-4.2%	-3.0%
Devonport Retail Catchment	**0.5%**	**-8.5%**	**-5.6%**	**-6.3%**	**-3.3%**

Source: MarketInfo; Ethos Urban

The total retail spending capacity of the Retail Catchment population is detailed in Table 3.5. It is calculated by multiplying the current and future population forecasts, with the per capita retail spending estimates outlined above. The spending forecasts are presented in constant $2021, i.e., excluding the effects of price inflation, though do include an allowance for real growth in per capita spending assumed to average around 0.9% per annum.

The total retail spending capacity of the Devonport Retail Catchment population is estimated at $939 million in 2021, including $431 million of FLG spending. Retail spending is projected to increase strongly over the forecast period to reach $1.18 billion at 2036, including $544 million of FLG spending.

Table 3.5: Devonport Retail Spending Capacity, 2021 - 2036 (Constant $2021)

Retail Category	2021	2026	2031	2036
Devonport				
FLG	$163.6m	$174.3m	$186.2m	$200.3m
Food Catering	$36.4m	$39.0m	$41.9m	$45.3m
Non-Food	$143.4m	$151.7m	$161.0m	$172.0m
Services	$11.7m	$12.5m	$13.4m	$14.5m
Total Retail	**$355.1m**	**$377.5m**	**$402.6m**	**$432.2m**
Latrobe				
FLG	$80.7m	$91.1m	$102.9m	$116.7m
Food Catering	$18.4m	$20.9m	$23.7m	$27.0m
Non-Food	$72.6m	$81.3m	$91.2m	$102.7m
Services	$5.8m	$6.5m	$7.4m	$8.5m
Total Retail	**$177.5m**	**$199.8m**	**$225.2m**	**$254.9m**
Kentish				
FLG	$42.3m	$45.3m	$48.7m	$52.7m
Food Catering	$9.0m	$9.6m	$10.4m	$11.3m
Non-Food	$36.3m	$38.6m	$41.2m	$44.3m
Services	$2.8m	$3.0m	$3.3m	$3.6m
Total Retail	**$90.4m**	**$96.5m**	**$103.6m**	**$111.9m**
Central Coast				
FLG	$144.0m	$153.2m	$163.2m	$174.3m
Food Catering	$32.5m	$34.8m	$37.3m	$40.0m
Non-Food	$128.7m	$135.9m	$143.9m	$152.5m
Services	$10.7m	$11.4m	$12.2m	$13.1m
Total Retail	**$315.9m**	**$335.3m**	**$356.6m**	**$379.9m**
Devonport Retail Catchment				
FLG	$430.6m	$463.8m	$501.1m	$544.0m
Food Catering	$96.3m	$104.3m	$113.2m	$123.6m
Non-Food	$381.0m	$407.5m	$437.3m	$471.6m
Services	$30.9m	$33.5m	$36.3m	$39.6m
Total Retail	**$938.9m**	**$1,009.0m**	**$1,087.9m**	**$1,178.8m**

Source: MarketInfo; Ethos Urban

3.5 Summary and Implications

- A Retail Catchment has been defined for the purposes of this study which includes the municipalities of Devonport, Latrobe, Kentish and Central Coast.
- The population of the Devonport Retail Catchment is estimated at 69,700 persons at June 2021, including 26,900 residents in the City of Devonport. Future growth in the Retail Catchment is projected to result in the population reaching 76,990 residents by 2036 including 28,800 persons in the City of Devonport.
- The projected rate of growth for the City of Devonport could be considered conservative when compared with the aspirations of Council, which has a target population of 30,000 by 2030 and 35,000 by 2040.
- Per capita retail spending by residents in the Devonport Retail Catchment is slightly below the average for Tasmania, though the Catchment is above average for spending on food, liquor and groceries (FLG).
- The retail spending capacity of this population is estimated at $939 million in 2021, including $431 million of FLG spending. Retail spending is projected to increase strongly over the forecast period to reach $1.18 billion at 2036.
- The growth in retail spending by residents in the Devonport Retail Catchment will create the need for additional retail floorspace in Devonport over time.

4 Consultation

As part of this Retail Study high-level consultation with key stakeholders, as identified by the City of Devonport, was undertaken. The objective of the consultation was to explore the key strengths and any major issues of concern facing the retail sector in Devonport.

In general terms, the feedback received is summarised as follows:

- The Devonport CBD generally works effectively, providing an appropriate mix of national brands and local operators. It provides a range of asset and building types that can accommodate most business needs. A key strength is the concentration of major supermarkets in the one area, as well as the LIVING CITY project.
- There is the opportunity to improve the presentation and quality of the existing retail offer to meet the expectations of the community, particularly the existing supermarket offers. This could be improved by capital investment with a focus on design, convenience, technology and sustainability. The uniqueness and range of different businesses in Devonport could be better recognised and promoted.
- Council could do more to support the retail sector which is facing a range of challenges. A central platform for retailers and stakeholders to share information and ideas should be implemented, as well as providing better information for tourists and other visitors on the retail/hospitality offer in Devonport.
- The provision of car parking and the walkability of the CBD is generally suitable, though there is some concern of a lack of convenient on-grade carparking, particularly near the major supermarkets. The reopening of the Mall to vehicular traffic should be considered subject to community consultation.
- The substantial and growing population base of the area creates the demand for additional retail facilities, including large format retail and showrooms, with some existing stores currently overcrowded and existing centres at capacity.
- There is a current lack of appropriate zoned land to accommodate additional retail stores, particularly outside of the CBD. In particular, the lack of neighbourhood centres to serve the suburbs of Devonport was raised as a concern.
- There is a need for further space to accommodate more large format retail and showroom uses. The CBD does not have sufficient or appropriate sites to accommodate these types of uses.
- The shift away from large format apparel is highlighted, with concern shown for the transition of these large format sites to differing uses, such as bulky goods, particularly given a lack of vehicle access.

In summary, the feedback received reflects that the Devonport CBD is generally an effective hub for retail activity, though the built form, quality of some shops, level of on-grade carparking and promotion activity could be improved. In the future, stakeholders discussed the need for additional retail facilities to serve the growing community, particularly additional large format retail uses and neighbourhood centres outside of the CBD.

5 Hierarchy of Retail Centres

This Chapter describes the current and likely future retail landscape of Devonport. Each retail centre in the municipality is detailed, while key centres located in the broader region are also outlined.

The location of major retailers in Devonport and the most relevant zones to retail are shown in Figure 5.1.

5.1 Existing Centres Overview

The Tasmanian Planning Scheme provides land use zones across the Devonport municipality. In terms of the zones which have an influence on the retail centre hierarchy in Devonport, the following provides a high-level overview:

- Central Business: This zone applies to primary centres and covers the Devonport CBD.
- General Business: This zone applies to main suburban and rural centres and covers Fourways.
- Local Business: This zone applies to centres supporting local areas, which covers numerous retail centres throughout Devonport.
- Urban Mixed Use: This zone provides for a mix of uses in urban locations including residential, retail, community and commercial use. Land surrounding the Devonport CBD and along William Street to the south of Fourways is located is this zone.
- Commercial: This zone provides for retailing, service industries, storage and warehousing requiring large floor areas. Land along Don Road, along Formby Road immediately north of the Bass Highway, and the Devonport Homemaker Centre is located in this zone.

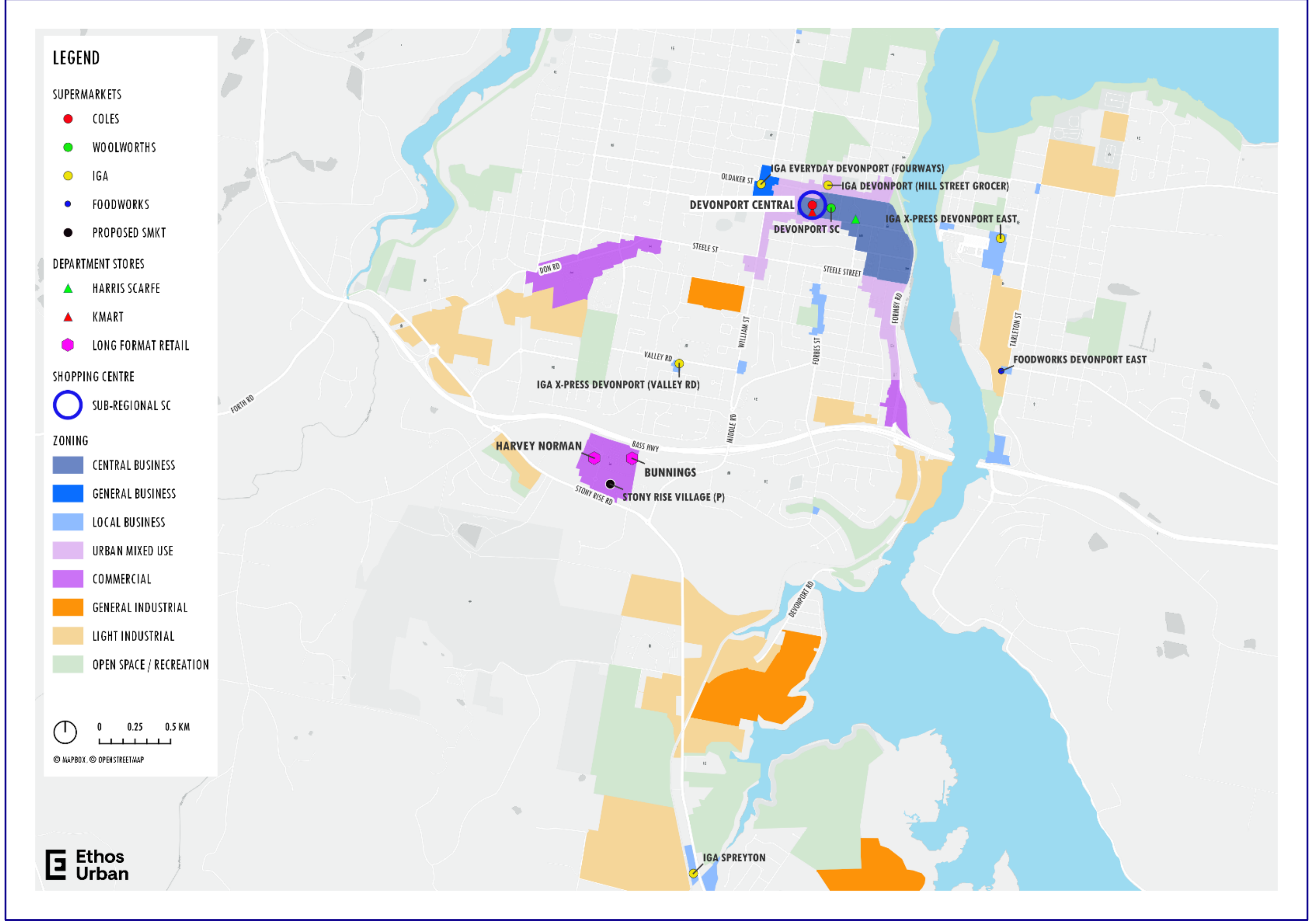
Devonport CBD

The Devonport CBD is the main business hub serving the wider surrounding region and provides a broad range of retail, commercial, entertainment, administrative and community uses. As discussed previously, it serves patrons throughout the defined Devonport Retail Catchment, which includes the municipalities of Devonport, Latrobe, Kentish and Central Coast. It also attracts some patronage from localities further afield such as Burnie and even Launceston, as well as serves tourists.

The CBD is generally located centrally to the urban area of Devonport, though is separated from East Devonport by the Mersey River. Formby Road provides convenient access to the CBD from the Bass Highway to the south, though it can become congested particularly during peak periods.

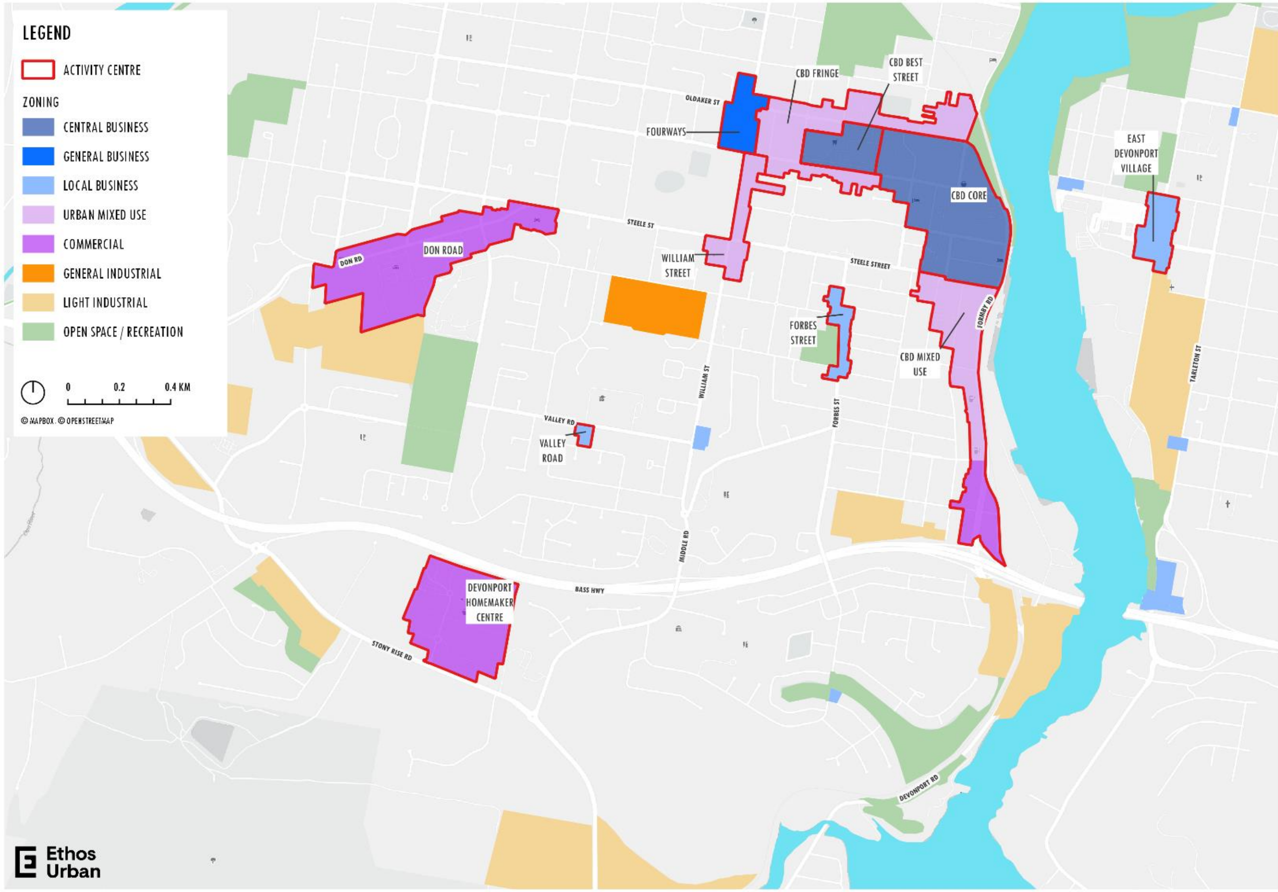
The Central Business zone generally extends from Steele Street in the south to Oldaker Street in the north, and from the Mersey River in the east to as far west as Gunn Street. For the purposes of this study, the area within the Central Business zone has been divided into CBD Core and CBD Best Street, to the east and west of Griffiths Street respectively. The land within the Urban Mixed Use Zone immediately north of the CBD Core (north of Oldaker Street) is referred to as the CBD Fringe, while the land south of the CBD within the Urban Mixed Use and Commercial zones is referred to as CBD Mixed Use. These areas are illustrated on Figure 5.2.

Figure 5.1: Major Retail Outlets and Relevant Zones



Source: Tasmanian Planning Scheme; Ethos Urban

Figure 5.2: Defined Retail Precincts and Relevant Zones



Source: Tasmanian Planning Scheme; Ethos Urban

CBD Core

The CBD Core provides a diverse range of retail shops and services, as well as a wide mix of non-retail shops, commercial office space, community uses and entertainment facilities.

Rooke Street Mall is the focus for retail activity in the CBD, and includes many national retailers typically present in regional cities throughout Australia (refer Chapter 7 for further detail). The Mall (and Rooke Street to the south) contains a range of apparel outlets including large Cotton On, Best & Less and Rivers outlets. The central spine also offers a diverse range of food options as well as a mix of non-food stores, convenience retail shops and services.

Traditional street-based retailing is also provided along the other streets in the area, particularly Stewart Street which includes a range of leisure (such as Toyworld and SportsPower), apparel and homewares stores. The former Target outlet at the intersection of Stewart Street and Rooke Street is now a large pharmacy. In terms of entertainment uses, the key anchor is a Reading Cinemas complex at the eastern end of Best Street.

The amount of commercial office space is also increasing in the CBD, which provides additional workers benefiting the retailers and other businesses in the area.

As detailed later in this Chapter, the CBD Core had a vacancy rate of 7.2% of retail floorspace as at April 2022 based on a field visit to Devonport at this time. This is slightly above the range of 4% to 6% which typically indicates a healthy centre. While some of the vacancies are located on Rooke Street Mall, the majority are situated on the secondary Stewart Street. Given the vacancies are mostly located in less prominent tenancies, this level of vacancy is not considered of concern for the CBD, which overall provides a vibrant and diverse retail offering.

The primary redevelopment areas of LIVING CITY are situated in the northern part of the CBD and are being progressively developed. The Paranaple Centre is complete and houses the Devonport Council offices, Devonport Library, customer service centre, a conference centre and a small Hudsons Coffee outlet. Some retail/entertainment facilities are provided in Market Square Pavilion, which includes Southern Wild Distillery, Firestorm Tacos & Bar as well as an events space. Additional retail uses are planned in the next stages of LIVING CITY.

CBD Best Street

This part of the CBD includes the major retail anchors of Kmart, Woolworths and Coles. These retailers, particularly the two major supermarkets, are understood to be trading strongly and appear to have ‘outgrown’ their current tenancies. The supermarkets could be better presented to effectively meet the expectations of consumers.

The supermarkets, and particularly the car parks, become congested during peak periods. This reflects that the supermarkets are the only major supermarkets located within Devonport. A range of food and beverage outlets and convenience retail shops are located within the Woolworths supermarket building.

CBD Fringe

The CBD Fringe precinct is defined as the area north of Oldaker Street, which has transformed significantly since 2008. The Hill Street Grocer (which replaced the former Home Timber and Hardware store) generally provides a high-quality offer of fresh produce, grocery products, homewares and a café. A liquor store, bar, medical centre, pharmacy and real estate agent are also located in the centre. A range of large format retail outlets are also located on the northern and southern sides of Oldaker Street.

CBD Mixed Use

A variety of commercial and retail uses are provided within the CBD Mixed Use precinct. The retail offer is a scattering of outlets, mostly located on Formby Road. The types of retail stores range from large format retail outlets (Godfreys, Choices Flooring, Carpet Court and Petbarn), food stores (No Frills Foodmarket) to some homeware/gift shops. A large Allgoods outdoor/camping outlet is located near the Bass Highway. Formby Road is a key north-south traffic route into the CBD from the south, and while it provides exposure to the retailers, access from the road is somewhat difficult given the amount of traffic.

Other Retail Centres

Fourways

The Fourways precinct extends along William Street, generally from around Oldaker Street to Best Street. It offers a village centre atmosphere with a wide collection of stores including a mix of national brands and independent operators. A number of arcades and pedestrian walkways provide convenient connectivity from William Street to a car park on Kempling Street. IGA X-press and The Reject Shop are located in the northern part of the centre. There are some tenancies of lower quality, though overall the centre functions well as a convenience shopping precinct for local residents.

East Devonport

East Devonport is separated from the balance of Devonport by the Mersey River, though can be easily accessed via the Bass Highway. A large port, including a terminal for the Spirit of Tasmania ferry, as well as a range of industrial uses, is located in East Devonport.

The retail offer is concentrated in East Devonport Village, while a scattering of retail uses are also provided along Tarleton Street to the south. The retail facilities in East Devonport serve both local residents as well as visitors using the Spirit of Tasmania.

East Devonport Village is centred around Wright Street and provides a relatively wide range of convenience retail outlets including an IGA X-press supermarket at the northern end near Thomas Street, some convenience retail shops on Wright Street and a range of cafes and services provided on Murray Street.

The various parts of the centre are not well integrated, with its walkability impacted by the presence of various large vacant blocks and some residential homes. The current layout of the centre in effect separates the retailers at the northern end near Thomas Street with the shops located on Murray Street. This impacts on the overall vibrancy of the centre. A field visit of the area revealed a vacancy rate of 17.5%, which is somewhat concerning. The vacancies are generally located in the northern part of the centre.

In the balance of East Devonport, a FoodWorks supermarket, bakery and café are located near the intersection of Tarleton Street and Torquay Road. A selection of other freestanding retailers are located along Tarleton Street including a liquor store on Riverview Avenue to the south and Peter & Una Seafoods to the north.

Given that the Spirit of Tasmania terminal is to be relocated to the south, Council should consider how to support and reinvigorate East Devonport Village during the transition period, as well as review if additional retail shops are needed closer to the new terminal.

William Street

A range of retail stores and some commercial uses are located along William Street and Steele Street to the south of the Fourways precinct. The majority of the retailers are fast food outlets and casual restaurants, and include some leading national brands such as KFC, Hungry Jack's and Zambrero. A large Cellarbrations liquor store is located in the south, which replaced the Robert Fergusson showroom (which was the former Retravision outlet).

Valley Road

A small strip centre is located opposite Tas TAFE on Valley Road. It consists of an IGA X-press supermarket, a TerryWhite Chemmart pharmacy, a medical centre, a hairdresser and a takeaway food outlet. The centre serves the top-up food and convenience shopping needs of residents in the immediate local area. It is located on a prominent site and is well placed to continue its role in serving the convenience needs of residents, students and local workers.

Spreyton

Spreyton is a satellite suburb of Devonport located in the southern part of the Devonport municipality some 5km from the Devonport CBD. A range of retail and some commercial uses are dispersed along Mersey Main Road, a key traffic route linking Devonport with Latrobe and other localities to the south. The traffic route can become relatively busy in peak periods.

A well-presented Supa IGA supermarket serves the grocery needs of residents, while a selection of fresh food stores, takeaway food outlets, a liquor store and some arts/crafts/gifts stores are also provided. As of April 2022, there were a number of vacant tenancies, though overall the current retailers appear to be performing well. The centre would benefit if the existing shops and services were better connected and integrated.

Other

Various other small retail centres (such as along Forbes Street) and numerous other freestanding retail shops are located throughout Devonport. The far majority of the shops are small casual restaurants/takeaway food stores and retail services such as hairdressers and beauty salons. These retailers serve mostly localised catchments, catering to the convenience needs of residents.

Large Format Retail/Commercial Precincts

Don Road

A range of showroom retail and commercial uses are located on Don Road in the western part of Devonport. The centre provides a range of large format retail outlets including a Becks Mitre 10 hardware store, RSEA Safety as well as flooring, furniture and electrical stores. Other retail shops are mostly cafes and casual restaurants serving the daytime workforce as well as residents in the evenings. The commercial uses include car dealerships, auto parts outlets, Reece Plumbing, amongst other businesses. Overall, the centre works well as a retail/commercial precinct serving the trade sector as well as residents, providing an ad hoc mix of businesses that require large footprints and likely lower rents.

Devonport Homemaker Centre

Opening in 2013, the Devonport Homemaker Centre is understood to be performing well. It is located on the Bass Highway, which ensures it is convenient to access from across Devonport and the surrounding region. The major anchors are Harvey Norman and Bunnings, together with BCF, Sleep n Style, Supercheap Auto, Autobarn and Shiploads Discount Store, while Anaconda recently opened. A service station component includes BP, McDonalds and Subway.

The centre effectively serves the homemaker/large format retail needs of residents throughout the region, which was identified in the 2008 Retail Strategy as a key component of the retail sector that was underrepresented in Devonport.

Other Outside Devonport City

Port Sorell

Two retail nodes are located in Port Sorell. A small village centre is provided on Club Drive and includes a Supa IGA supermarket, food outlets and some convenience retail shops. The second retail node is located on Alexander Street and includes a neighbourhood shopping centre, anchored by a Woolworths supermarket, and a nearby Mitre 10 hardware store.

Latrobe

Latrobe provides a relatively extensive retail strip centre of street-based shops along Gilbert Street. It includes two small supermarkets (IGA Xpress and Hill Street Grocer), The Reject Shop, a range of food and beverage outlets and a mix of convenience shops. The strip centre is well-presented and would be effectively serving the daily convenience shopping needs of surrounding residents.

Sheffield

Sheffield includes a small cluster of shops and services along Main Street. It is anchored by a small IGA supermarket and provides a number of cafes and casual restaurants. The retail offer is sufficient for local residents to undertake daily convenience shopping, however those residents would need to regularly travel into Devonport to undertake more extensive shopping trips.

Ulverstone

A significant cluster of retail shops and services are provided in the Ulverstone Town Centre. This includes three supermarkets (Coles, Woolworths and IGA), a number of non-food anchor retailers (such as Harris Scarfe), an extensive provision of street-based retailing as well as various large format retail outlets (such as a Becks Mitre 10 hardware store).

Proposed Centres

Stony Rise Village (proposed centre)

A new neighbourhood shopping centre is proposed to be developed immediately south of the Devonport Homemaker Centre on Friend Street with a development application recently lodged. According to media reports, the 7,500 sq.m centre is to be anchored by a 4,000 sq.m Woolworths supermarket, and has an expected opening date in 2024. If approved, the centre has the potential to serve the convenience retail needs of residents in southern Devonport.

5.2 Existing Retail Provision

The existing provision of retail and vacant floorspace at the various centres located throughout the City of Devonport is based on a survey of the area undertaken on 12 and 13 April 2022. The survey involved recording the name, type and size of every shop in the municipality. The provision of retail floorspace by key retail category is detailed in Table 5.1.

In total there is an estimated 84,840 sq.m of occupied retail floorspace across the various centres in Devonport. Close to half is provided within, or near, the Devonport CBD, while the other largest centres in terms of retail floorspace are Devonport Homemaker Centre, Don Road and Fourways.

According to this information there was a total of 3,480 sq.m of vacant shopfront floorspace which would be suitable for retail uses. This reflects a vacancy rate of 3.9%, which is considered low and healthy for a regional city. However, some centres have vacancy rates over 10.0%, including Devonport East Village, Fourways and Forbes Street, which should be closely monitored to ensure the level of vacancy does not increase further.

Table 5.2 details the number of retail outlets across the various centres in Devonport.

Table 5.1: Existing Retail Floorspace – City of Devonport, April 2022

Centre	FLG	Food Catering	Non-Food	Large Format Retail	Services	Total Occupied	Vacant	Total	Vacancy Rate
CBD									
CBD Core	1,020	3,840	14,590	0	1,510	**20,960**	1,620	**22,580**	7.2%
CBD Best Street	6,680	270	5,590	0	240	**12,780**	0	**12,780**	0.0%
CBD Fringe	1,680	230	360	2,260	0	**4,530**	0	**4,530**	0.0%
CBD Mixed Use	210	0	1,580	1,310	0	**3,100**	0	**3,100**	0.0%
Total CBD	**9,590**	**4,340**	**22,120**	**3,570**	**1,750**	**41,370**	**1,620**	**42,990**	**3.8%**
Devonport East									
Devonport East Village	540	360	1,500	0	240	**2,640**	560	**3,200**	17.5%
Balance	1,090	300	0	0	0	**1,390**	0	**1,390**	0.0%
Total Devonport East	**1,630**	**660**	**1,500**	**0**	**240**	**4,030**	**560**	**4,590**	**12.2%**
Other Retail Centres/Shops									
Fourways	1,330	860	3,190	0	890	**6,270**	740	**7,010**	10.6%
William Street	1,000	1,190	80	0	0	**2,270**	0	**2,270**	0.0%
Forbes Street	160	130	0	0	380	**670**	80	**750**	10.7%
Valley Road	530	80	320	0	80	**1,010**	0	**1,010**	0.0%
Spreyton	1,580	380	680	0	0	**2,640**	280	**2,920**	9.6%
Other	330	700	300	0	460	**1,790**	0	**1,790**	0.0%
Total Retail Centres	**4,930**	**3,340**	**4,570**	**0**	**1,810**	**14,650**	**1,100**	**15,750**	**7.0%**
Large Format Retail/Commercial Precincts									
Homemaker Centre	0	330	0	16,080	0	**16,410**	0	**16,410**	0.0%
Don Road	0	640	1,200	6,540	0	**8,380**	200	**8,580**	2.3%
Total LFR Precincts	**0**	**970**	**1,200**	**22,620**	**0**	**24,790**	**200**	**24,990**	**0.8%**
City of Devonport	**16,150**	**9,310**	**29,390**	**26,190**	**3,800**	**84,840**	**3,480**	**88,320**	**3.9%**

Source: Nearmap; Ethos Urban (April 2022)

Table 5.2: Existing Number of Retail Outlets – City of Devonport, April 2022

Centre	FLG	Food Catering	Non-Food	Large Format Retail	Services	Total Occupied	Shop Vacant	Total
<u>CBD</u>								
CBD Core	7	30	66	0	16	**119**	13	**132**
CBD Best Street	3	3	4	0	2	**12**	0	**12**
CBD Fringe	3	2	2	3	0	**10**	0	**10**
CBD Mixed Use	1	0	4	4	0	**9**	0	**9**
Total CBD	**14**	**35**	**76**	**7**	**18**	**150**	**13**	**163**
<u>Fourways</u>								
Total Fourways	**9**	**8**	**15**	**0**	**10**	**42**	**6**	**48**
<u>Devonport East</u>								
Devonport East Village	3	3	4	0	3	**13**	5	**18**
Devonport East Balance	4	2	0	0	0	**6**	0	**6**
Total Devonport East	**7**	**5**	**4**	**0**	**3**	**19**	**5**	**24**
<u>Retail Centres/Shops</u>								
William Street	1	7	1	0	0	**9**	0	**9**
Forbes Street	2	2	0	0	4	**8**	1	**9**
Valley Road	1	1	1	0	1	**4**	0	**4**
Spreyton	4	3	2	0	0	**9**	3	**12**
Other	3	6	2	0	5	**16**	0	**16**
Total Retail Centres	**11**	**19**	**6**	**0**	**10**	**46**	**4**	**50**
<u>Large Format Retail Precincts</u>								
Homemaker Centre	0	2	0	6	0	**8**	0	**8**
Don Road	0	4	3	4	0	**11**	1	**12**
Total LFR Precincts	**0**	**6**	**3**	**10**	**0**	**19**	**1**	**20**
Total City of Devonport	**41**	**73**	**104**	**17**	**41**	**276**	**29**	**305**

Source: Ethos Urban (April 2022)

5.3 Change in Retail Provision Since 2008

The current provision of retail floorspace within the various retail centres in Devonport has been compared with the results from the floorspace audit undertake for the previous 2008 Retail Strategy. There are some differences in the reporting of the floorspace figures since the previous study, such as separating out total food into fresh food/liquor (including supermarkets) and food catering (i.e. cafes, restaurants and takeaway food outlets) and separating out large format retail/homemaker floorspace from total non-food floorspace.

The estimated retail floorspace figures as at 2008, based on the new categories, is provided in the **Appendix**. The retail floorspaces figures at 2008 in this report differ slightly from the figures quoted in the 2008 Retail Strategy due to inclusion of some additional tenancies and some tenancy size revisions.

There has been a substantial change to the retail landscape in Devonport since the time of the previous Retail Strategy in 2008. Most notably the following changes have occurred:

- The Devonport Homemaker Centre opened in 2013, which accommodates a number of leading national large format retailers including Harvey Norman and Bunnings. The relocation of the Harvey Norman from the CBD is primary reason for the large decline in large format retail floorspace in the CBD Core precinct.
- A range of new retail facilities were developed at the fringe of the Devonport CBD including the Hill Street Grocer and several large format retail stores on Oldaker Street, as well as some large format retail stores on Formby Road.
- An IGA supermarket was developed in Spreyton, replacing a former dated store on a nearby site.

The change in retail floorspace in each centre by category is detailed in Table 5.3

Table 5.3: Change in Retail Floorspace – City of Devonport, 2008 - 2022

Centre	FLG	Food Catering	Non-Food	Large Format Retail	Retail Services	Total Occupied	Vacant	Total
CBD								
CBD Core	560	1,210	-130	-1,930	-160	**-450**	1,140	**690**
CBD Fringe	1,680	230	360	-520	0	**1,750**	0	**1,750**
CBD Mixed Use	210	0	0	910	-80	**1,040**	0	**1,040**
CBD Best Street	210	120	190	0	190	**710**	0	**710**
Total CBD	**2,660**	**1,560**	**420**	**-1,540**	**-50**	**3,050**	**1,140**	**4,190**
Devonport East								
Devonport East Village	0	-200	-170	0	-80	**-450**	360	**-90**
Devonport East Balance	-100	0	0	0	0	**-100**	0	**-100**
Total Devonport East	**-100**	**-200**	**-170**	**0**	**-80**	**-550**	**360**	**-190**
Retail Centres/Shops								
Fourways	470	310	-765	0	-70	**-55**	80	**25**
William Street	1,000	370	-920	0	0	**450**	0	**450**
Forbes Street	80	-50	-100	0	380	**310**	80	**390**
Valley Road	0	-60	120	0	10	**70**	-70	**0**
Spreyton	530	200	600	-400	-160	**770**	280	**1,050**
Other	75	140	25	0	0	**240**	0	**240**
Total Retail Centres	**2,155**	**910**	**-1,040**	**-400**	**160**	**1,785**	**370**	**2,155**
Large Format Retail Precincts								
Homemaker Centre	0	330	0	16,080	0	**16,410**	0	**16,410**
Don Road	-480	390	-1,600	1,200	-80	**-570**	200	**-370**
Total LFR Precincts	**-480**	**720**	**-1,600**	**17,280**	**-80**	**15,840**	**200**	**16,040**
Total City of Devonport	**4,235**	**2,990**	**-2,390**	**15,340**	**-50**	**20,125**	**2,070**	**22,195**

Source: Nearmap; Ethos Urban

5.4 Summary and Implications

- The Devonport CBD is the main business hub serving the wider surrounding region and provides a broad range of retail, commercial, entertainment, administrative and community uses. The CBD, including the mixed-use areas that surround the retail core, provides an estimated 41,370 sq.m of retail floorspace.
- A broad range of other centres are located throughout Devonport including Fourways, Don Road, Devonport Homemaker Centre, Spreyton, Devonport East Village, William Street and various other small centres.
- According to a floorspace survey undertaken for the purposes of this study, there is an estimated 84,840 sq.m of occupied retail floorspace in the City of Devonport as at April 2022.
- The vacancy rate of retail floorspace is estimated at 3.9% overall, which is considered low and healthy for a regional city. However, some centres have vacancy rates over 10.0% which should be monitored.
- Since 2008, the amount of retail floorspace in Devonport has increased by an estimated 22,200 sq.m. Some of the most notable changes include the development of the Devonport Homemaker Centre and additional retail uses on the fringe of the CBD including Hill Street Grocer and some new large format retail outlets.

6 Retail Turnover and Demand Analysis

This Chapter provides detailed analysis of estimated retail turnover, escape spending and retail floorspace demand.

6.1 Retail Turnover

In order to prepare an analysis of escape spending and floorspace demand in the City of Devonport, it is necessary to examine the extent to which sales at local retail facilities are attributable to residents in Devonport.

An estimate of total retail sales for centres located in the City of Devonport has been prepared using industry benchmarks and our own judgement of likely trading performance based on observations made during the field visit as well as discussions with industry stakeholders.

Total turnover at all retail facilities in the City of Devonport is estimated at $504.5 million, including an estimated $295.8 million in retail turnover at shops located in the Devonport CBD and surrounds (being CBD Core, CBD Fringe, CBD Mixed Use, and CBD Best Street). This information is shown in Table 6.1.

An estimate of the share of sales that can be attributed to spending by residents of Devonport has also been determined, based on an assessment of the catchment areas served by each centre, the types and scale of retailers in each centre, an analysis of visitors as sourced from Near (refer Appendix) and the consultant's judgement of the overall trading patterns for retail facilities in Devonport.

The analysis found that retail outlets in the City of Devonport generate approximately $295.4 million of retail turnover which can be attributed to residents in the municipality, representing approximately 59% of total retail sales in Devonport. The balance, or 41% of retail turnover in Devonport, is estimated to be derived from spending by non-residents, primarily those living in the balance of the Devonport Retail Catchment, although also including tourists and other visitors. This analysis finds that retailers in Devonport generate $209.1 million of retail sales from residents outside Devonport, referred to as captured spending.

Table 6.1: Devonport Turnover Estimates by Centre, 2021

Centre	Total Sales ($m)	Est. % of Sales by Residents of Devonport	Total Sales to Residents of Devonport ($m)
CBD Core	$117.7	54%	$63.4
CBD Fringe	$28.3	57%	$16.0
CBD Mixed Use	$13.9	52%	$7.3
CBD Best Street	$136.0	62%	$84.3
Fourways	$37.8	76%	$28.7
William Street	$14.7	80%	$11.7
Forbes Street	$3.5	80%	$2.8
Valley Road	$6.9	78%	$5.4
Homemaker	$55.1	40%	$22.2
Don Road	$31.5	42%	$13.3
Devonport East Village	$15.0	67%	$10.0
Devonport East Balance	$13.7	63%	$8.7
Spreyton	$20.2	69%	$14.0
Other	$10.3	74%	$7.6
Total City of Devonport	**$504.5**	**59%**	**$295.4**

Source: Various sources; Ethos Urban

6.2 Escape Spending

Escape spending refers to the extent to which retail spending by residents in a particular region is directed to retail facilities located outside the region. A high level of escape spending typically indicates a relative lack of retail facilities in the area and may indicate latent demand for additional retail floorspace. It may also suggest that the range and type of retail facilities in a region are not meeting the needs of local residents, and that residents are therefore shopping outside the catchment to meet their needs.

In general terms, a usual outcome of reducing escape spending (thereby increasing local retail sales activity), is the creation of local jobs, particularly for young people who make up the majority of retail staff. This mostly leads to increased wages and salaries, and a stimulus to the local economy. Therefore, lowering the level of escape spending in an area benefits the local economy.

The broad analysis of escape spending presented here is based on estimates of available spending by City of Devonport residents (Chapter 3) and estimates of existing sales at retail outlets in Devonport that are attributable to local residents (refer previous Table 6.1).

The escape spending analysis indicates that as at 2021 there is escape spending by Devonport residents equivalent to $60 million (refer Table 6.2). In order words, $60 million of retail expenditure of residents in Devonport is being directed to retail facilities located outside Devonport. This represents approximately 17% of the total available retail spending by residents of Devonport.

This estimated level of escape spending is considered to be in-line with expectations of a dynamic retail sector, with the current provision of retail facilities able to largely meet the needs of the local community. It is noted that the level of escape spending in Devonport has declined since the time of the 2008 Retail Strategy, when it was estimated at 21%. The substantial drop is mostly attributed to the development of new retail facilities in the area over the past 14 years.

Escape spending in non-food retail product categories is estimated at 22%. This reflects the 'comparison shopping' nature of much of non-food retailing, and the willingness of consumers to travel further in order to undertake major shopping trips for products such as apparel, homewares and whitegoods. The level of escape spending in the non-food category has reduced significantly since the 2008 Retail Strategy, mostly reflecting the development of the Devonport Homemaker Centre.

The estimate of escape spending on food items is also in-line with normal expectations of a healthy retail sector, with a figure between 10% and 15% of available spending on food considered standard. This reflects the fact that people typically direct most of their grocery shopping to the closest major supermarket facility.

As expected, there is negligible escape spending in the retail services category, which is usually undertaken at the very local level.

Table 6.2: Escape Spending from the City of Devonport, 2021 ($2021)

Factor	Food	Non-Food	Services	Total
Total Sales ($m)	$261.9	$227.4	$15.2	$504.5
Sales to Devonport Residents ($m)	$173.2	$111.5	$10.8	$295.4
Available Spending by Residents ($m)	$200.0	$143.4	$11.7	$355.1
Escape Spending ($m)	**$26.9**	**$32.0**	**$0.9**	**$59.7**
Escape Spending as % of Available Spending	13%	22%	8%	17%

Source: Ethos Urban

Overall, the analysis presented in Table 6.2 shows that there may be some minor scope to reduce levels of escape spending from the City of Devonport. While escape spending of 17% is within acceptable levels for a healthy retail sector such as in the City of Devonport, the analysis identifies a possible opportunity in the non-food sector to retain a higher share of local retail expenditure. It is noted that if the current provision of retail floorspace remains unchanged in Devonport, escape spending would likely increase over time from current levels due to growth in population and retail spending. Thus, a certain level of new retail development is required to maintain escape spending at current levels.

6.3 Retail Floorspace Demand and Supply Analysis

The demand for new retail floorspace in Devonport is created as a result of a range of factors including the following:

- Any current unmet demand for retail floorspace in the area created by the existing residents and visitors.
- Population growth in the region, which generates additional demand for retail goods and services over time.
- Opportunities for additional spending captured from outside the region, including from tourists and other visitors.
- Opportunities to increase the share of resident spending that is captured by retail facilities in the region (i.e. reducing escape spending).

These factors form the basis for the following assessment of the opportunity for new retail development in the City of Devonport over the period to 2036. An indicative assessment of future retail floorspace need is useful in identifying the magnitude of new development which needs to be accommodated by retail and strategic planning policy.

When forecasting the need for additional retail floorspace a retail spending model is often applied, in which projections of available spending and broad estimates of average trading levels are used to calculate the quantum of retail floorspace that a population can support.

The adopted retail spending model in this study takes into account the provision and sales of the current retailers, the estimated current level of escape spending, the likely level of sales captured from beyond Devonport and the projection of population growth in the region.

It is important to recognise that there is always a degree of uncertainty associated with forecasting over longer-term time periods, and this constraint applies in the following analysis of future retail floorspace need. The following analysis is intended as a broad guide of the potential for new retail floorspace over the forecast period. It should be viewed as indicative and not as a strictly defined limit or allocation of retail floorspace in Devonport over that period.

It is further noted that the projected population growth for the City of Devonport adopted in this report are conservative when compared with the aspirations of Council. If a higher rate of population growth is realised, then the demand for retail floorspace would increase.

The current situation of retail floorspace demand and supply is detailed in Table 6.3, which is based on the following inputs and assumptions:

- The total retail spending capacity of residents in Devonport at 2021 is estimated, as detailed in Chapter 3.
- A proportion of spending by residents in Devonport realistically able to be retained in the area is adopted. These are based on the current escape spending rates as detailed previously in Table 6.2.
- The potential sales that retailers in Devonport are expected to be able to capture from residents outside Devonport, including visitors, is estimated. This is based on the analysis

provided in Table 6.1, though with beyond spending increasing slightly to allow for additional spending captured from visitors to Devonport.

- An average trading level for existing retailers, based on industry averages and observations of current performance, is applied.

The above metrics provide an estimate of demand for retail floorspace in Devonport. The estimated demand is then compared with the existing supply to determine if there is an oversupply or undersupply of retail floorspace in Devonport. It is noted again that this analysis should be viewed as indicative and is based on the key assumptions adopted. Nevertheless, it does provide an indication of how effectively the current provision of retail uses is meeting the expected demand.

The retail floorspace demand analysis indicates that there is a **current shortfall of retail floorspace in the order of 10,000 sq.m in Devonport**.

In terms of retail floorspace by category, there is considered a need for the following:

- 4,400 sq.m of floorspace dedicated to food outlets including potentially a supermarket.
- 5,450 sq.m of non-food floorspace including potentially new large format retail outlets.
- 160 sq.m of retail services, which includes hairdressers/beauty salons and the like.

This analysis indicates that overall the scale of retail floorspace in Devonport broadly meets the needs of customers, though there is potential for some additional retail floorspace to be supported.

Table 6.3: Retail Floorspace Analysis, City of Devonport, 2021

Item	Food	Non-Food	Retail Services	Total
Devonport Retail Spending 2021 ($m)	$200.0	$143.4	$11.7	$355.1
Spending Potentially Retained (%)	90%	80%	95%	86%
Potential Spending Retained ($m)	$180.0	$114.7	$11.1	$305.8
Est. Share of Sales from Beyond Devonport (%)	35%	55%	30%	44%
Retail Sales Available for Devonport Retailers ($m)	$276.1	$253.3	$15.8	$545.2
Average Trading Level ($ per sq.m)	$9,250	$4,150	$4,000	$5,749
Retail Floorspace Demand (sq.m)	29,850	61,030	3,960	94,840
Current Retail Floorspace (sq.m)	25,460	55,580	3,800	84,840
Est. Retail Floorspace Shortfall (sq.m)	**4,390**	**5,450**	**160**	**10,000**

Source: MarketInfo; Ethos Urban

The analysis of future retail floorspace need created by population growth is detailed in the following Tables 6.4 to 6.5.

The amount of retail spending that can realistically be retained in Devonport is firstly detailed in Table 6.4, which is based on the following inputs and assumptions:

- The total retail spending capacity of residents in Devonport from 2021 to 2036 is estimated, as detailed in Chapter 3. It is reiterated that all retail spending estimates in this report are quoted in 2021 dollars, i.e. excluding retail price inflation.
- The proportion of spending by residents in Devonport realistically able to be retained in the LGA, as opposed to escaping the area, is applied as previously examined.
- The potential sales that retailers are expected to be able to capture from residents outside Devonport including visitors is estimated, again as previously applied.

- The resultant figures provide the total estimated retail spending from residents and visitors available to retailers in Devonport assuming an adequate range and provision of retail stores and services.

The analysis in Table 6.5 then converts the potential increase in retained retail spending into estimated additional retail floorspace need, based on the following inputs and assumptions.

- The estimated increase in retail spend captured from residents and visitors for each 5-year period is calculated based on the figures in Table 6.4. It is important to note that not all new retail spending will necessarily be directed to new retail facilities. A small share of the growth will be directed to existing retailers in Devonport. Therefore, new retail development potential is based on an assumption that 80% of the increase in new retail spending would be available to new retail developments.
- An average trading level for new retailers is then applied. The figures quoted are for 2021-2026, with the average trading levels expected to increase slightly over time.
- Applying the average trading levels to the increase in retail spending provides estimated demand for additional retail floorspace in Devonport for the various periods. Note these figures represent the net increase in supportable retail floorspace and that, in some instances, new retail development may replace existing retail facilities.
- The analysis finds that population growth in the region is expected to create the demand for an additional 13,950 sq.m of retail floorspace. The total estimated additional retail floorspace considered supportable in Devonport over the forecast period to 2036 is then calculated by adding the current estimated shortfall of retail floorspace in Devonport with the estimated additional retail floorspace need over the forecast period.

This analysis finds that there is the potential need for a further approximately **24,000 sq.m of retail floorspace** in Devonport by 2036 to effectively serve the needs of residents and visitors. It is noted that this figure does not include an allowance for parts of some retail premises which are focussed on serving the needs of the trade or non-household sector, which would slightly add to the demand for retail floorspace in Devonport. Though it is noted that premises dedicated to serving the trade sector are considered ‘non-retail’ and are therefore excluded from this analysis.

It is also noted that if a stronger rate of population growth occurs in Devonport than projected, then the assessed need for additional retail floorspace may be higher the above estimate.

Table 6.4: Indicative Retail Spending Retained, Devonport, 2021 – 2036 ($m)

Item	Food	Non-Food	Retail Services	Total
Devonport Retail Spending				
2021	200.0	143.4	11.7	355.1
2026	213.3	151.7	12.5	377.5
2031	228.1	161.0	13.4	402.6
2036	245.6	172.0	14.5	432.2
Growth in Retail Spending 2021 to 2036	+45.6	+28.6	+2.8	+77.0
Retention of Retail Spending				
Est. Share of Retail Spending Retained	90%	80%	95%	86%
Potential Retained Spending in Devonport				
2021	180.0	114.7	11.1	305.8
2026	191.9	121.4	11.9	325.2
2031	205.3	128.8	12.7	346.9
2036	221.1	137.6	13.8	372.5
Growth in Retained Spending 2021 to 2036	+41.0	+22.9	+2.7	+66.6
Plus Retail Spend from Beyond Devonport				
Est. Proportion of Spend from Beyond Devonport	35%	55%	30%	44%
Est. Spend Available to Devonport Retailers				
2021	276.1	253.3	15.8	545.2
2026	294.4	268.0	17.0	579.3
2031	314.9	284.4	18.2	617.5
2036	339.0	303.8	19.7	662.5
Potential Growth in Retail Spend 2021 to 2036	+62.9	+50.5	+3.8	+117.3

Source: MarketInfo; Ethos Urban

Table 6.5: Indicative Additional Retail Floorspace Supportable, Devonport, 2021 – 2036

Item	Food	Non Food	Retail Services	Total
Sales Available to New Retail Facilities @80% of Growth ($m)				
2021-2026	14.6	11.7	0.9	27.3
2026-2031	16.4	13.2	1.0	30.6
2031-2036	19.3	15.5	1.2	36.0
Total 2021 - 2036	**50.3**	**40.4**	**3.1**	**93.8**
Additional Supportable Retail Floorspace				
Ave. Sales for New Retail F'space 21-26 ($ per sq.m)*	*10,000*	*4,500*	*4,250*	*6,670*
Additional Floorspace Demand (sq.m)				
2021-2026	1,460	2,610	210	4,280
2026-2031	1,570	2,800	230	4,600
2031-2036	1,770	3,170	250	5,190
Total Additional Retail Demand 2021 - 2036	**4,800**	**8,580**	**690**	**14,070**
Est. Retail Floorspace Shortfall (sq.m)				
As at 2021 (refer Table 6.3)	**4,390**	**5,450**	**160**	**10,000**
Est. Additional Supportable Floorspace (sq.m)				
Up to 2036	**9,190**	**14,030**	**850**	**24,070**

* Average trading levels for retailers are assumed to increase at 0.8 – 0.9% per annum.

Source: MarketInfo; Ethos Urban

6.4 Potential Retail Development Outcomes

The proceeding analysis finds that there is currently a retail floorspace shortfall of approximately 10,000 sq.m in Devonport, and this shortfall would increase to approximately 24,000 sq.m by 2036 if no further retail facilities are developed.

The actual development opportunities arising from this retail floorspace shortfall are difficult to predict and will be largely determined by property market dynamics and the response of the retail industry. However, in general terms the following opportunities are evident:

- An expansion in the provision of food outlets, including additional supermarket floorspace and a wider provision of food & beverage outlets (food catering).
- A large provision of non-food specialty space and some additional large format retail outlets.
- A minor increase in the provision of retail services.

The future opportunities are considered by retail type in the remainder of this Chapter.

Discount Department Store

Discount department stores (such as Target, Big W, Harris Scarfe and Kmart) are important anchor tenants for major retail centres such as the Devonport CBD, and serve a broad role as a sub-regional destination for a wide range of primarily non-food product categories. At present, the Devonport CBD contains Kmart and Harris Scarfe outlets.

The discount department store sector continues to face a generally challenging trading environment, particularly with the growth in online sales constraining the total market share achieved by the sector. In terms of operators, Kmart continues to actively look for opportunities, while Big W and Target have generally been focused on closing underperforming stores.

Given the population of the Devonport region, and that Devonport already includes Kmart and Harris Scarfe outlets, there is considered limited opportunity for a new discount department store in Devonport over the forecast period.

Supermarkets/neighbourhood centres

Supermarkets are important anchor retailers and generally attract high levels of customer traffic to a locality. There are currently two full-line supermarkets (with full-line generally considered to be at least 3,000 sq.m in size) in Devonport, as well as two in Ulverstone and one in Port Sorell. Therefore, five full-line supermarket are currently provided within the Devonport Retail Catchment.

A general benchmark often considered in the property industry is the provision of one major supermarket operator for every 8,000 to 10,000 people. The Devonport Retail Catchment contains a population of approximately 69,700 residents. On this broad measure there is demand for at least another full-line supermarket currently, and potentially another supermarket in the medium term.

This measure is also supported by the understanding that the Coles and Woolworths supermarkets in the Best Street precinct are trading very strongly, thereby indicating a need for additional supermarket floorspace.

Overall, there is considered to be an opportunity for a new full-line supermarket in Devonport currently. There is also considered to be the opportunity at the present time to refurbish and potentially expand the existing Coles and Woolworths supermarkets on Best Street to better serve the needs of customers and meet modern consumer expectations.

In the medium term, there is considered to be the need for further supermarket floorspace in Devonport as the population of the region increases. This could be in the form of expansions of existing stores or the development of new supermarkets.

Homemaker/large format retail

The Devonport Homemaker Centre opened in 2013 and additional retailers have opened at the centre over time. The centre is currently fully leased. Given the analysis in the report and observation of the current market, there is considered to be the opportunity for some additional large format retail outlets in Devonport. Ideally the new stores would be located near the Devonport Homemaker Centre or on Don Road.

Devonport CBD

The Devonport CBD is generally preforming well and additional retail floorspace is considered supportable currently and in the future. More detailed recommendations for the CBD are provided in Chapter 7, though in general terms a range of mostly food and convenience retail is supportable at LIVING CITY, as well as other small scale new and refurbished retail facilities throughout the CBD and surrounding mixed-use areas.

Other

The assessed shortfall in retail floorspace indicates the opportunity for some additional retail at the various activity centres throughout Devonport. The mix and provision of retail uses at all centres needs to continually to be updated to meet the changing needs of the consumer. Recommendations for new retail facilities at the other centres in Devonport is provided in the following Chapter 7, though there is considered a particular need for further retail facilities in East Devonport and Spreyton.

6.5 Summary and Implications

- An analysis of retail turnover suggests that retailers in Devonport overall generate around 41% of sales from people living outside the City of Devonport.
- Spending by residents of Devonport directed to retail facilities outside of the Local Government Area (escape spending) is estimated at 17% of total spending. This estimated level of escape spending is considered to be in-line with expectations of a healthy retail sector, indicating that the existing retail facilities are largely meeting the needs of the local community.
- A retail floorspace demand and supply analysis indicates a current shortfall of 10,000 sq.m of floorspace in Devonport. This shortfall of retail floorspace is expected to increase to approximately 24,000 sq.m by 2036 if no retail facilities are developed over the forecast period.
- There is considered to be an opportunity for a new full-line supermarket, additional food & beverage outlets, some non-food/convenience retail shops and more large format retail stores to serve the needs of the local community and visitors.

7 National Retailer Gap Analysis

This Chapter provides a high-level gap analysis of leading national retailers.

Table 7.1 lists the key national retailers currently present in Devonport, as well as identifies if the retailer is located at other regional cities of a similar scale to Devonport.

Table 7.2 details some leading national retailers located in the other selected regional cities though are not in Devonport.

The cities examined are located in the eastern mainland states of Australia, and some retailers may not currently have a presence in Tasmania. This list of retailers should be used as a broad guide only of the types of retailers that could potentially be supportable in Devonport.

Furthermore, this analysis does not suggest that national retailers are preferred over independent operators. It is simply an analysis of the types of leading retailers that are typically located in other regional cities. For the majority of retail precincts, it is important that a mix of national and independent operators are accommodated to ensure that the needs and preferences of shoppers are met.

Table 7.1: Leading National Retailers Located in Devonport

Town	Devonport	Gladstone	Tamworth	Traralgon–Morwell	Warragul	Bowral–Mittagong	Orange	Dubbo	Nowra–Bomaderry	Bathurst	Warrnambool
Postcode	7310	4680	2340	3844/3840	3820	2576/2575	2800	2830	2541	2795	3280
State	TAS	QLD	NSW	VIC	VIC	NSW	NSW	NSW	NSW	NSW	VIC
Retailer											
The Reject Shop	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Bunnings	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Super Cheap Auto	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
EB Games	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Harvey Norman	Y	Y	Y	Y	Y	-	Y	Y	Y	Y	Y
Just Jeans	Y	Y	Y	Y	-	Y	Y	Y	Y	Y	Y
Priceline	Y	-	Y	Y	Y	Y	Y	Y	Y	Y	-
Kmart	Y	Y	Y	Y	Y	-	Y	Y	Y	Y	Y
Rivers	Y	Y	Y	Y	-	Y	Y	Y	Y	Y	Y
Strandbags	Y	Y	Y	Y	-	Y	Y	Y	Y	Y	Y
Best & Less	Y	Y	Y	Y	-	-	Y	Y	Y	Y	Y
Petbarn	Y	Y	Y	-	Y	Y	Y	Y	Y	Y	-
Cotton On	Y	Y	Y	Y	-	Y	Y	Y	Y	-	Y
Sussan	Y	-	Y	Y	-	Y	Y	Y	Y	Y	Y
Jay Jays	Y	Y	Y	Y	-	-	Y	Y	Y	Y	-
Spendless Shoes	Y	Y	Y	Y	-	-	-	Y	Y	Y	Y
Toyworld	Y	-	Y	Y	Y	-	Y	-	-	Y	Y
Mitre 10	Y	-	-	-	-	Y	Y	Y	Y	Y	Y
Kathmandu	Y	-	Y	Y	-	-	Y	-	-	-	Y
Harris Scarfe	Y	-	-	Y	-	-	-	-	-	-	Y
Factorie	Y	-	-	Y	-	-	-	Y	-	-	-
Jeanswest	Y	-	-	Y	-	-	-	-	-	-	Y

Source: Ethos Urban

Table 7.2: Gap Analysis of Leading National Retailers

Town	Devonport	Gladstone	Tamworth	Traralgon–Morwell	Warragul	Bowral–Mittagong	Orange	Dubbo	Nowra–Bomaderry	Bathurst	Warrnambool
Postcode	7310	4680	2340	3844/3840	3820	2576/2575	2800	2830	2541	2795	3280
State	TAS	QLD	NSW	VIC	VIC	NSW	NSW	NSW	NSW	NSW	VIC
Retailer											
Aldi	-	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Dan Murphys	-	Y	Y	Y	-	Y	Y	Y	Y	Y	Y
Spotlight	-	Y	Y	Y	-	Y	Y	Y	Y	Y	Y
Officeworks	-	Y	Y	Y	-	Y	Y	Y	Y	Y	-
The Athlete's Foot	-	Y	Y	Y	-	Y	Y	Y	Y	-	Y
Fantastic Furniture	-	-	Y	Y	-	-	Y	Y	Y	Y	Y
Barbeques Galore	-	-	Y	Y	-	Y	-	Y	Y	-	Y
Pillow Talk	-	Y	Y	-	-	Y	Y	-	Y	Y	-
Michael Hill	-	-	Y	-	-	Y	Y	Y	-	Y	Y
Rockmans	-	-	Y	Y	-	Y	-	-	Y	Y	Y
Adairs	-	-	Y	-	Y	Y	Y	-	-	-	Y
Betta Electrical	-	Y	-	Y	-	Y	Y	-	-	Y	-
Forty Winks	-	-	Y	Y	Y	-	-	-	Y	-	Y
Bed Bath N' Table	-	-	-	-	-	Y	Y	Y	-	Y	Y
Katies	-	Y	Y	Y	-	-	-	-	Y	-	Y
Sportscraft	-	-	Y	-	-	Y	Y	Y	-	-	Y
JB Hi-Fi	-	-	Y	Y	-	-	-	Y	-	Y	-
Rebel Sport	-	-	-	Y	-	Y	-	-	-	-	Y
Lincraft	-	Y	-	-	-	Y	-	-	-	-	Y
Snooze	-	-	-	Y	-	-	-	Y	-	-	Y
Sunglass Hut	-	Y	Y	-	-	-	-	Y	-	-	-
Lorna Jane	-	-	Y	-	-	-	Y	-	-	-	-
Smiggle	-	-	-	Y	-	-	-	-	-	Y	-
Witchery	-	-	Y	-	-	Y	-	-	-	-	-

Source: Ethos Urban

8 Strategic Direction for Devonport Retailing

This Chapter provides a number of key recommendations to assist Council in guiding retail development in Devonport.

Devonport is an important regional centre serving a large rural and semi-rural hinterland, with the retail sector performing an important role in ensuring that Devonport acts as the retail and business hub serving north-western Tasmania.

Retailing provides vital economic activity which contributes to jobs and incomes, and has an important social role in the delivery of goods and services. It also contributes to the built environment and can provide an important sense of place for the community.

New retail development provides investment into the local economy and contributes to job creation and economic development. It can also provide the flexibility to accommodate change and innovation in the retail sector. An appropriate provision and mix of retail uses maximises the opportunity of retaining retail spending by local residents, as well as attracting spending from residents in the broader surrounding region and other visitors such as tourists.

Recommendation 1: Continue to support the primacy of the Devonport CBD

The Devonport CBD plays an important role in serving the wide range of needs of the surrounding regional catchment as well as tourists. This role should be maintained and enhanced through appropriate retail and other commercial development, with an aim of continuing to improve the vibrancy and attractiveness of the CBD.

The Devonport CBD needs to constantly evolve to meet the latest market conditions and the changing demands and expectations of shoppers and other users. Some buildings and retail tenancies in the CBD are aging, of low quality and poorly presented, and need to be improved to modern standards. In particular, some arcades in the CBD require investment with a focus on increasing visitation levels to support the retailers and businesses.

It is important that there is an ongoing process of improvement in urban design and retail function, which ensures that the attractiveness of the CBD as a place to visit and shop is maintained and improved. An integrated approach to development which includes both the public and private sectors has the potential to significantly improve the appeal of the older street-based parts of the Devonport CBD. As an example, King Street, which includes a number of vacancies and vacant sites, and lacks the vibrancy of other parts of the CBD, should be a key focus for redevelopment with improved public amenity.

It is important to ensure that the current planning controls and mechanisms for the Devonport CBD are suitable to facilitate and encourage appropriate development. Development within the CBD needs to continue, to ensure it remains relevant for the community and meets the needs of consumers. Increasing the mix and intensity of development will concentrate activity within the CBD and contribute to its vibrancy, benefiting the retail sector and other businesses.

Mixed-use developments with a range of retail, commercial and residential uses, which are generally lacking at present in the CBD, should be encouraged. Facilitating the development of more commercial space will increase the number of workers in the CBD, while high-density housing will attract more residents. Ongoing private investment is considered vital for the ongoing success of the Devonport CBD.

Council should continue to focus on increasing activity and attracting patrons to the CBD including local residents, local workers and visitors. The Devonport CBD should be promoted as a key destination for shopping and business activity, as well as an attractive place to visit for tourists, and take advantage of its central location and well-established retail sector. It needs to continue to provide a unique experience and offer a broad range of retail types across food, convenience shopping, entertainment and higher-order comparison shopping facilities. A good quality and diverse retail offering in the CBD will assist in maximising the retail spend in the area, which in turn will support a broad retail offering. Ensuring that the retail offer and opening times meet the expectation of tourists is considered critical.

Overall, it is important to continue to recognise the Devonport CBD as a key destination for business and shopping for the Devonport community and visitors. Its unique character and diversity of businesses should be valued and celebrated. It should also be promoted as a suitable place for retail, commercial and mixed-use developments, with a focus on regional-level retail, commercial, community and administrative functions. It is vital that private and public investment in the CBD continues so that it can evolve to meet the changing needs of the community.

Actions

- Ensure that all major retail development proposed in Devonport outside of the CBD be properly assessed to ensure the primacy of the Devonport CBD is protected.
- Ensure the planning controls and mechanisms for the Devonport CBD are suitable so that appropriate redevelopment opportunities which respond to market demand are encouraged.
- The ongoing evolution of the Devonport CBD should be supported by actively seeking an ongoing program of new developments and redevelopments of existing buildings subject to appropriate heritage and urban design guidelines.
- Encourage intensive mixed-use developments across the CBD which accommodate a mix of retail, commercial and residential uses as well as optimise urban design outcomes. Supporting commercial office developments and attracting commercial office businesses to the CBD should be a focus.
- Encourage property owners to invest in maintaining and improving the quality and presentation of their buildings.
- Examine ways to improve the night-time economy in the CBD, such as encouraging more clustering of restaurants as well as investing in improved lighting and streetscapes.
- Promote the Devonport CBD as a convenient and vibrant place to shop and undertake business. Implement programs to engage residents and attract visitors and tourists such as marketing campaigns and hosting events. Rooke Street Mall, as well as the unique and diverse range of other shopfront business throughout the CBD, should be celebrated.
- Continue to improve the walkability of the CBD, though also ensure it is easy to access by public transport and by car. Ensure that wide consultation is undertaken before deciding if cars should return to Rooke Street Mall.
- Encourage mixed-use developments with increased intensity on sites within the Urban Mixed Use zone that surrounds the CBD, though ensuring the primacy of the CBD is always protected. Retail development which requires car access from Formby Road should be carefully assessed given the traffic route can become congested during peak periods.
- Encourage retail offerings to meet the expectation of tourists and other visitors, including through appropriate opening times of businesses.
- Build on the success of LIVING CITY and encourage developments in the CBD to take advantage of river frontage.

Best Street Precinct

A key strength of the CBD is the concentration of several national retailers in the one location on Best Street, creating a key destination for retail activity. However, there has been limited capital investment in some the buildings on Best Street, which could be improved to meet the expectation of today's consumer.

There are considered opportunities for more intensive development of some sites in the precinct which could provide commercial and residential uses as well as a more integrated and pedestrian friendly shopping environment. The car parking serving the two major supermarkets could be improved with better connectivity.

Actions:

- Encourage capital investment in the key private buildings and adjoining car parks that accommodate retail uses.
- Encourage more intense developments which cater to the needs of the community and optimise urban design outcomes.
- Support appropriate redevelopment and expansion of the two major supermarkets.

LIVING CITY - CBD Extension

LIVING CITY is emerging as a vibrant extension of the Devonport CBD and effectively connects the CBD with the Mersey River. Many parts of the precinct have now been completed such as a new car park, Market Square Pavilion, Council offices, service centre, library, arts centre and open space, while the hotel is nearing completion.

The next stage of LIVING CITY – Stage 3 on Fenton Way – has the potential to continue to lift visitation levels to the CBD and further increase activity in the area. The retail precinct of the project has the opportunity to provide a broad range of shops and other businesses that can become a key destination for retail and service activity in the area.

Actions:

Promote LIVING CITY as a key destination for retail and business activity in the Devonport CBD, which is easily accessible and provides a strong connection with the established parts of the CBD including Rooke Street Mall. The retail offer of Stage 3 would ideally provide a market vibe and is recommended to include the following:

- A blend of national brands and local operators, to maximise the customer base served by the retail precinct though also ensuring a unique offering.
- A range of fresh food stores which can showcase the local produce of the region.
- A cluster of causal restaurants which can activate the area during the day as well as in the evening to support the nigh-time economy of the CBD. Ideally, the restaurants would provide a diverse range of cuisines at various price points to cater for a diverse customer base.
- A number of destination retailers and businesses to ensure patrons are consistently attracted to the precinct. Ideally, the operators would focus on promoting retail as an experience rather than just a place to shop.
- An opportunity for pop up stores, which could be leased on short term contracts.

In general terms, Stage 3 of LIVING CITY on Fenton Way is not considered an appropriate location for large homemaker type retailers, which are recommended to be located in a homemaker precinct. The retail offer should be specifically tailored to the needs of the community and visitors, and where appropriate provide uses which promote and celebrate Devonport.

Recommendation 2: Better define a retail centre hierarchy for Devonport

The Tasmanian Planning Scheme outlines a number of zones which provide for retail facilities including Central Business (Devonport CBD), General Business (Fourways), Local Business (various centres), Urban Mixed Use and Commercial (Homemaker Centre, Don Road and part of Formby Road). While these zones provide high-level guidance of the types of uses encouraged, it is recommended that a clearer retail centre hierarchy is defined that describes the specific role, function and theme of each centre in the City of Devonport. It is noted that at present East Devonport Village as well as the three shops at the intersection of North and William Street are both in the Local Business zone, despite the vastly different roles they serve.

A clearly defined retail centre hierarchy can be an important tool in describing the role of centres and guiding the type and extent of retail provision in each centre. The retail centre hierarchy should reflect that different sized centres perform varying roles in retailing and related activities.

An appropriately defined hierarchy would assist in planning for the efficient delivery of retail and business services, and would provide greater certainty for stakeholders including Council, developers, property owners and businesses. It would also provide an important reference point in assessing applications for retail developments in the various zones. It is noted that the lack of a clearly defined retail centre hierarchy can result in ad hoc and reactive decision-making which increases uncertainty for stakeholders and can result in sub-optimal development outcomes.

Actions:

- Clearly define a retail centre hierarchy to assist in guiding the appropriate scale and type of new retail development in each centre, as well as assist in assessing development applications.
- Once defined, maintain and support the retail centre hierarchy. If any changes to the nominated retail activity centre hierarchy are required, it would need to be clearly justified and consistent with the policy objectives of Council.

Recommendation 3: Support appropriate retail development

The provision of an appropriate level of retail facilities for residents and visitors is important to drive economic activity and investment, support existing businesses and create jobs. If a sufficient level of retail facilities are not provided to serve the needs of the community, retail expenditure will escape Devonport to the detriment of existing businesses and residents.

It is important that policies facilitate appropriate development to maximise investment and economic activity in Devonport. New retail development provides the opportunity to accommodate change and innovation in the retail sector. It also increases the opportunity of retaining additional retail spending in the municipality by residents as well as maximising the retail spending by visitors including tourists.

This is particularly important as the retail sector in the City of Devonport also serves residents of the adjoining municipalities. Tangible economic benefits are available to Devonport associated with ensuring that spending by City of Devonport residents and residents of the surrounding municipalities is retained locally, rather than escaping to other major regional cities.

A planning process for retail development in Devonport which identifies and facilitates appropriate development will support private investment and maximise economic activity. Where practical, new retail developments are recommended to integrate with established transport and community infrastructure to ensure efficient and sustainable outcomes.

Actions:

- Support, facilitate and encourage appropriate development for new or expanded retail facilities, as well as the redevelopment of existing facilities, while ensuring developments are in accordance with the retail centre hierarchy and Council's strategic planning objectives.

Recommendation 4: Promote development which consolidates activity in established centres and reduces fragmentation

The clustering of retail and business activity in well-defined centres contributes to the vibrancy and commercial viability of shops and other businesses in a centre. A fragmented retail offer unnecessarily dilutes activity and vibrancy, is less convenient for consumers and can result in inefficient use of land and infrastructure

Important benefits can be gained from providing a broad range of facilities at activity centres. The concentration of a mix of uses in an activity centre contributes to sustainability and improved efficiencies by reducing the need for multiple trips associated with shopping, business activity, education and community interaction. Reducing trips also leads to a reduction in private car use and urban congestion and improves pedestrian safety.

Actions:

- Support the consolidation of retail, community, entertainment, and other business development within the hierarchy of activity centres in Devonport. This includes identifying key development sites within established centres that can potentially accommodate retail and commercial facilities. East Devonport Village and Spreyton are two examples which would benefit substantially from a consolidation of retail and business facilities.
- Retail development outside the defined activity centres should be discouraged, though it is noted that new centres may need to be created at times subject to the needs of the community.

Recommendation 5: Support the ongoing operation and evolution of activity centres in Devonport

There are numerous activity centres located throughout Devonport as detailed in Chapter 5 of this study. It is recommended that Council better define the roles of all activity centres in Devonport, and assist in supporting and promoting the centres as destinations for shopping and business activity. Council should also aim to strengthen the centres by encouraging appropriate development that reinforces the defined role of each centre.

The various smaller centres, such as along Valley Road and Forbes Street, should also be recognised as important contributors to the retail network at the local level. The centres provide convenience retail shops and services for local residents and workers, including within a walkable catchment.

Actions:

- Define the role and theme of each activity centre, as well as provide a vision and aspirations for future development.
- Promote and celebrate the unique characteristics of each activity centre in Devonport, with a focus on increasing activity as well as encouraging appropriate investment and development.
- Encourage ongoing private investment in the quality and presentation of retail and shop tenancies.
- Contribute public investment to improve the presentation and vibrancy of centres through inputs such as streetscaping and hosting events.

- Consult and work with existing businesses and retailers to ensure their voices are heard and their needs met where appropriate.

Further recommended actions for specific centres are provided following.

Don Road

A range of retail and commercial uses are provided on Don Road, which benefits from high exposure and relatively convenient accessibility from the surrounding region. Don Road is considered an appropriate location for an ad hoc mix of customer serving businesses which require relatively large footprints. It is recommended that Council define the role of the Don Road precinct more clearly and assist in strengthening the centre by encouraging more tenants which contribute to the defined role of the centre.

It is considered appropriate for Don Road to function, and be better known as, a key large format retail precinct, secondary to the Devonport Homemaker Centre. Other commercial uses which require large areas should also be supported. Don Road is a suitable location for a diverse mix of facilities which serve the needs of both businesses and residents.

Actions:

- Develop a vision for the Don Road precinct and ensure appropriate controls are in place to support this vision.
- Encourage the ongoing evolution of the Don Road precinct with a focus on providing a mix of commercial and retail uses that require large footprints. Fine grain retail outlets, such as small shops, should be discouraged, though a provision of food outlets to mostly serve workers and visitors to the precinct should be provided.

Large Format Retail and Homemaker Centre

The Devonport Homemaker Centre provides a range of national retailers and is understood to be trading well. The centre is important as it assists in retaining homemaker expenditure in Devonport, which was escaping the municipality before the development of the centre. In particular, the level of escape spending in the non-food category has reduced significantly since the 2008 Retail Study, partly reflecting the development of the centre.

As the resident population of Devonport and the surrounding region continues to grow, there will be a need for additional large format retail outlets in Devonport. The demand analysis reveals that there is currently a shortfall of 4,600 sq.m of non-food retail floorspace, increasing to 13,000 sq.m by 2036, some of which would be appropriately served by new large format retail outlets.

In addition, as demonstrated in the gap analysis provided in Chapter 7, there are several national large format retailers who typically operate stores in regional cities with a similar population base to Devonport that do not currently have a presence in the area.

Actions:

- Liaise with developers and retailers to ensure that there is sufficient land available to accommodate the development of large format retail facilities at appropriate locations.
- Support and facilitate the development of additional large format retail outlets at appropriate locations subject to the market need being demonstrated.

Fourways

Fourways is generally a well presented, vibrant and active centre that provides a wide mix of retail shops and services. It performs well as a village hub serving the convenience shopping and service needs of the local community. However, some of shops appear somewhat dated which impacts on the overall ambience of the centre.

Actions:

- Improve the attractiveness and amenity of the centre through a range of direct and indirect actions such as investing in streetscaping, hosting events and encouraging private investment in shopfronts.
- Promote the centre as a highly convenient destination for daily shopping and community activity.
- Encourage development where it is consistent with the convenience role of the centre and optimises urban design outcomes.

East Devonport

East Devonport includes a Village Centre centred around Wright Street and a small cluster of shops on Tarleton Street. Strategic planning for retail development in East Devonport could be improved to provide a more structured approach to retail development in this part of Devonport and to encourage better integration of retail facilities in the area.

East Devonport Village contains a variety of retail shops and services, and should continue to be supported as the main destination for retail and commercial activity in East Devonport. The future relocation of the terminal for the Spirit of Tasmania further to the south may impact the centre to some degree. Therefore, the centre may need additional support during this transition period.

A number of vacant sites are located throughout East Devonport Village which creates a fragmentation of the retail facilities, with the shops near Thomas Street particularly being disconnected with the facilities on Murray Street. There is considered to be an opportunity to create a stronger, more connected centre with a village atmosphere that responds to the needs of local residents as well as visitors.

At present East Devonport does not provide a strong gateway into Tasmania for Spirit of Tasmania customers and visitors. There is considered to be an opportunity for the provision of retail uses throughout East Devonport to better showcase Northern Tasmania including its attractions as well as local produce and crafts.

The Tarleton Street precinct is more ad hoc in nature, though a small cluster of shops is located at the intersection with Torquay Road including a FoodWorks supermarket. Once the terminal for the Spirit of Tasmania is relocated, there may be an opportunity for additional retail and commercial uses in this locality.

There is considered to be a benefit in formally recognising East Devonport Village as a centre of a higher-order than Local Business in the planning scheme. This may encourage investment and development in the locality, to better respond to the needs of the community.

Actions:

- Implement a more structured approach to guide retail development in East Devonport Village to allow the centre to better fulfil its potential as a village centre serving the needs of residents and visitors to East Devonport.
- Recognise East Devonport Village as a centre of a higher-order than Local Business in the planning scheme to assist the centre in effectively catering to the needs of the community.
- Encourage and support development at East Devonport Village that improves the integration and connection of existing retail and business facilities.
- Promote East Devonport Village and support the traders where practical during the relocation of the terminal for the Spirit of Tasmania.

- Support new development and additional retail facilities along Tarleton Street where the market need for such uses is established, particularly once the terminal for the Spirit of Tasmania is relocated to the area.

Spreyton

Retailers and businesses in Spreyton primarily serve the area of Devonport to the south of the Freeway, as well as residents of the adjacent Latrobe and Kentish municipalities. There has been some rural residential development occurring in Spreyton and the areas to the south.

The Spreyton centre currently lacks integration, with retailers and businesses dispersed along Mersey Main Road. A strategic plan for Spreyton that focuses on improving the integration and clustering of businesses is recommended. A traffic plan for Spreyton would also be useful, as the level of traffic along Mersey Main Road, particularly during peak periods, is affecting the ultimate performance of the centre.

Actions:

- Better define the role of the Spreyton centre as a key neighbourhood centre serving the communities of Spreyton and the surrounding localities.
- Seek to improve the current fragmentation of facilities by supporting the integration and clustering of retail and commercial uses where practical.
- Review and better manage the high levels of vehicle traffic along Mersey Main Road.

Recommendation 6: Assess major retail development applications against appropriate criteria, including for developments outside established centres

The analysis undertaken for this study indicates that the future population and retail spending growth projected for the City of Devonport and the surrounding region will result in the need for expansions of existing activity centres and potentially the creation of new centres. In particular, the floorspace demand analysis in this study finds that there is a potential need for an additional 24,000 sq.m of retail floorspace in Devonport by 2036.

It is recommended that Council support major retail development applications where there is a clear demonstrated need and a market gap for the proposed development. Council would need to be satisfied that the proposed development would not have an adverse impact on the retail centre hierarchy of Devonport nor on the primacy of the Devonport CBD.

When assessing the need for new or expanded retail facilities, Council should request evidence that the additional retail floorspace is needed and will not have an adverse effect on the viability of any existing centre. This evidence should include an appropriate assessment of retail demand compared with retail supply, as well as consider the likely trading impacts on existing and approved centres from the proposed development. It should also provide analysis of the likely contribution to Net Community Benefit from the proposed development, which considers a range of factors such as community choice, job creation, activity centre vibrancy and centre implications.

While retail development should be encouraged to be provided in existing centres on land which is appropriately zoned, on occasion it may be appropriate for new retail development to be provided outside established centres. In some cases, a site may need to be rezoned to facilitate the development. Planning for new retail centres requires careful consideration to ensure that the market need for new retail facilities is balanced against the need to maintain the healthy operation of the existing retail centre hierarchy.

For any rezoning, Council would need to be completely satisfied that the proposed use cannot be accommodated within the existing centre hierarchy or on other appropriately zoned land.

Furthermore, the applicant must demonstrate that the proposed location is consistent with the urban context of the surrounding area, and that the proposed development would not impact on the local character and amenity.

For any site to be rezoned, it is preferred that it is located adjected or close to an existing activity centre. Council would also need to be satisfied to a high degree that the rezoning and proposed development would not have any adverse impact on the retail centre hierarchy of Devonport and particularly the primacy of the Devonport CBD.

Actions:

- Support retail development applications where the proponent clearly establishes the retail need and market gap for the development, and where any adverse impacts on the retail centre hierarchy are within acceptable limits.
- For any major retail development or rezoning application, economic/planning analysis showing the market need, impact analysis and as assessment of Net Community Benefit should be requested. The analysis should be appropriately detailed, transparent and verifiable.

9 Conclusion

Devonport is an important regional centre serving a large rural and semi-rural hinterland, with the retail sector performing an important role in ensuring that Devonport acts as the retail and business hub serving north-western Tasmania. Over the past decade, there has been substantial change to the retail landscape in Devonport including the development of the Devonport Homemaker Centre, the opening of Hill Street Grocer and a provision of a range of new large format retail stores near the Devonport CBD.

Another critical change in Devonport is the commencement of LIVING CITY, the largest urban renewal project undertaken in regional Tasmania. LIVING CITY is transforming Devonport by creating a cultural heart, opening the city up to the waterfront, and further establishing the city as a key destination for business activity and visitors.

There is an estimated 84,840 sq.m of occupied retail floorspace across the various centres in Devonport. Close to half is provided within, or near, the Devonport CBD. The other largest centres in terms of retail floorspace are Devonport Homemaker Centre, Don Road precinct and Fourways. The vacancy rate of retail floorspace in Devonport is estimated at 3.9%, which is considered low and healthy for a regional city.

Since 2008, the time of the previous Retail Strategy prepared for the City of Devonport, the amount of occupied retail floorspace has increased by just over 20,000 sq.m. This is largely attributed to the development of new large format retail outlets, particularly at the Devonport Homemaker Centre.

Escape spending, which is a measure of retail spending by residents in a particular region being directed to retail facilities located outside the region, is estimated at a healthy 17% for Devonport. This has declined significantly since 2008, when it was estimated at 21%.

A retail floorspace demand analysis undertaken for this study finds that there is a current shortfall of retail floorspace in the order of 10,000 sq.m in Devonport. This estimated retail floorspace shortfall is estimated to increase to approximately 24,000 sq.m by 2036 if no retail development occurs over that period.

A vibrant retail sector is important for a thriving community, and the provision and scale of retail facilities needs to continually change to meet the requirements and preferences of the community. New retail development is important as it provides investment into the local economy and contributes to job creation. It can also provide the flexibility to accommodate change and innovation in the retail sector.

Devonport contains numerous activity centres with the existing retail facilities largely meeting the needs of the local community and visitors. Though it is important that activity centres evolve as the demands and needs of the community change. The following are some recommendations to assist Council in guiding retail development in Devonport:

- Continue to support the primacy of the Devonport CBD.
- Better define a retail centre hierarchy for Devonport.
- Support appropriate retail development.
- Promote development which consolidates activity in established centres and reduces fragmentation.
- Support the ongoing operation and evolution of activity centres in Devonport.
- Assess major retail development applications against appropriate criteria, including for developments outside established centres.

Appendix

Mobile Ping Data

Visitors to the Devonport CBD have been analysed using mobile phone ping data from Near, which provides home/evening location details and number of visits for customers.

Information on the evening location of visitors to the Devonport CBD is detailed in Table A1, including the average number of visits. The data is for the period from January 2021 to March 2022, therefore, restrictions due to the COVID-19 pandemic over this period would have impacted the results, particularly the proportion of international visitors.

The data shows that some 82% of visits to the Devonport CBD were from people residing in the Devonport Retail Catchment. The majority of customers live in Devonport, though there is also a significant proportion from the surrounding municipalities of Latrobe, Kentish and Central Coast.

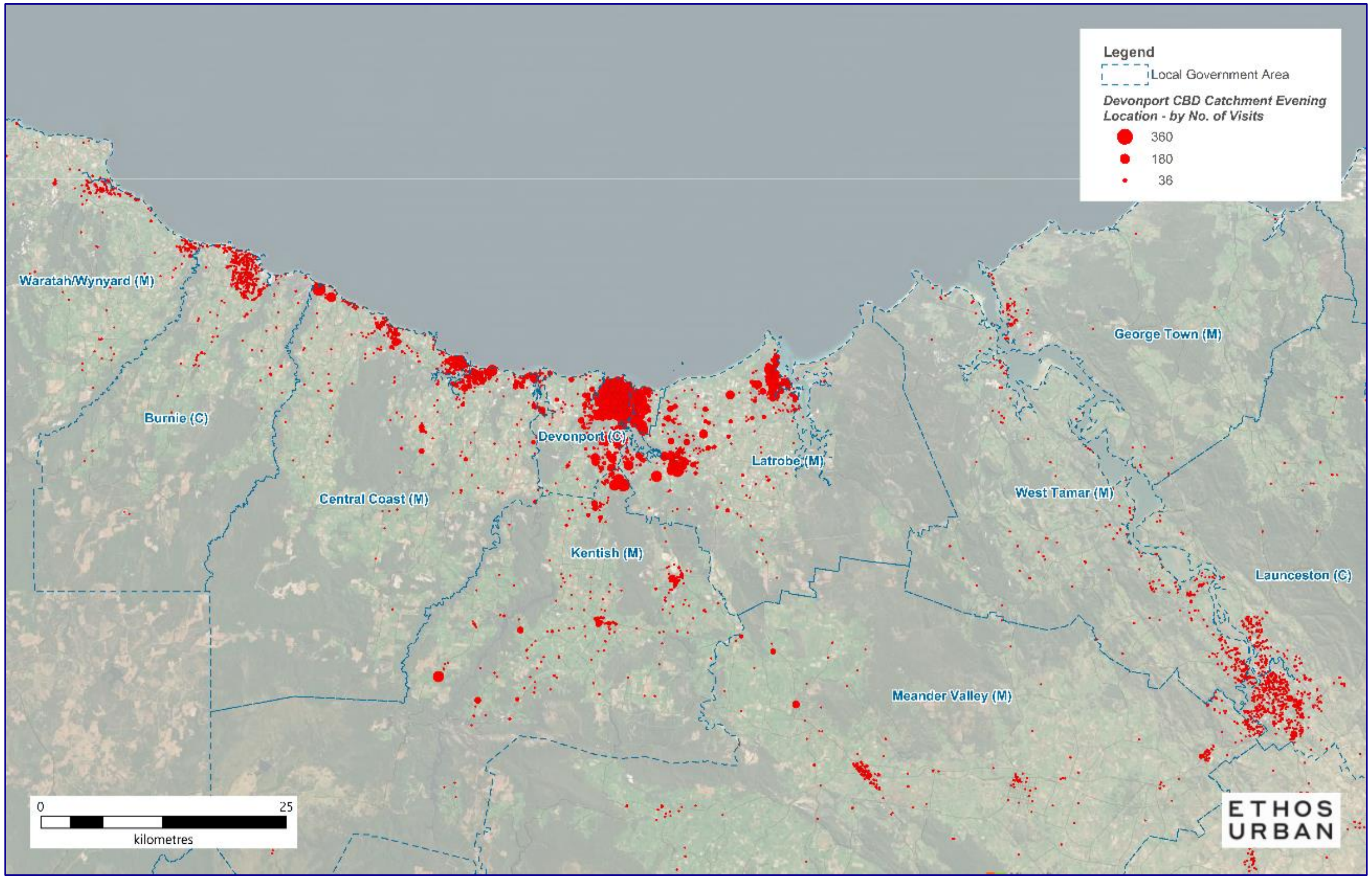
Figure A1 shows the evening locations of visitors to the Devonport CBD.

Table A1: Proportion of Visits and Visitors to Devonport CBD by Home Location

Area	Visitors % of total	Visits % of total	Average No. of Visits
Devonport	22.0%	53.6%	18
Latrobe	7.5%	14.3%	14
Kentish	2.7%	4.4%	12
Central Coast	8.3%	9.4%	8
Devonport Retail Catchment	**40.6%**	**81.7%**	**15**
Launceston and Surrounds	8.8%	2.9%	2
Burnie and Surrounds	6.5%	3.2%	4
Balance of Tasmania	15.5%	5.2%	2
Tasmania	**71.3%**	**92.8%**	**9**
Victoria	14.1%	3.6%	2
New South Wales	6.2%	1.3%	2
Balance of Australia	8.1%	2.1%	2
Australia	**99.7%**	**99.9%**	**7**
International	0.3%	0.1%	2
Total	**100.0%**	**100.0%**	**7**

Source: Near; Ethos Urban

Figure A1: Devonport CBD - Evening Location of Visitors



Source: Near; Ethos Urban

Retail Floorspace Type and Provision as at 2008

The following Table A2 provides a summary of the type and provision of retail floorspace in Devonport as at 2008, based on the 2008 Retail Strategy. Some of the categories have been amended to allow for a better understanding of the types of retail uses provided in each centre.

Table A2: Retail Floorspace Provision – City of Devonport, 2008

Centre	FLG	Food Catering	Non-Food	Large Format Retail	Retail Services	Total Occupied	Shop Vacant	Total	Vacancy Rate
Devonport CBD									
CBD Core	460	2,630	14,720	1,930	1,670	**21,410**	480	**21,890**	2.2%
CBD Best Street	6,470	150	5,400	0	50	**12,070**	0	**12,070**	0.0%
CBD Fringe	0	0	0	2,780	0	**2,780**	0	**2,780**	0.0%
CBD Mixed Use	0	0	1,580	400	80	**2,060**	0	**2,060**	0.0%
Total Devonport CBD	**6,930**	**2,780**	**21,700**	**5,110**	**1,800**	**38,320**	**480**	**38,800**	**1.2%**
Fourways									
Total Fourways	**860**	**550**	**3,955**	**0**	**960**	**6,325**	**660**	**6,985**	**9.4%**
Devonport East									
Devonport East Village	540	560	1,670	0	320	**3,090**	200	**3,290**	6.1%
Devonport East Balance	1,190	300	0	0	0	**1,490**	0	**1,490**	0.0%
Total Devonport East	**1,730**	**860**	**1,670**	**0**	**320**	**4,580**	**200**	**4,780**	**4.2%**
Other Retail Centres/Shops									
William Street	0	820	1,000	0	0	**1,820**	0	**1,820**	0.0%
Forbes Street	80	180	100	0	0	**360**	0	**360**	0.0%
Valley Road	530	140	200	0	70	**940**	70	**1,010**	6.9%
Spreyton	1,050	180	80	400	160	**1,870**	0	**1,870**	0.0%
Other	255	560	275	0	460	**1,550**	0	**1,550**	0.0%
Total Retail Centres	**1,915**	**1,880**	**1,655**	**400**	**690**	**6,540**	**70**	**6,610**	**1.1%**
Large Format Retail Precincts									
Homemaker Centre	n.a.	n.a.	n.a.	n.a.	n.a.	**n.a.**	n.a.	**n.a.**	n.a.
Don Road	480	250	2,800	5,340	80	**8,950**	0	**8,950**	0.0%
Total LFR Precincts	**480**	**250**	**2,800**	**5,340**	**80**	**8,950**	**0**	**8,950**	**0.0%**
Total City of Devonport	**11,915**	**6,320**	**31,780**	**10,850**	**3,850**	**64,715**	**1,410**	**66,125**	**2.1%**

Source: Retail Strategy 2008 (Essential Economics)

Draft Retail Activity Centre Hierarchy – Devonport LGA

Activity centres provide the focus for services, employment and social interaction in cities and towns[1] and typically form part of a larger network of locations within a city, town, or region which includes larger centres supported by smaller complementary centres.

Commented [MS1]: Just trying to reduce the number of times the word 'centre' is used in this sentence.

The preparation of a retail activity centre hierarchy represents a key recommendation from the Devonport Retail Study 2022 recently commissioned by Council.

The purpose of a retail activity hierarchy is to define and describe the specific role, function and theme of each retail centre in the Devonport local government area. This represents a common practice approach and effective means of planning for future growth and will assist to guide and inform decision making around investment, land use planning, and economic development in a logical and justifiable way in accordance with the desired role and function of each centre and their attributes[2]. It further aims to promote efficiencies and foster a complementary relationship between activity centres, rather than creating undesirable duplication or competition between centres.

The Tasmanian Activity Centre Network[3] identifies the following key benefits of establishing an activity centres network:

(a) Provides certainty for businesses, investors and residents by clearly articulating the future role and function of centres and the likely investment that will occur in them;
(b) Recognises and enhances the complementary roles centres play in an activity centre network;
(c) Supports the clustering of similar activities and in doing so promotes competition, productivity, economic efficiencies between businesses, economic activity and other benefits of agglomeration;
(d) Reduces competition for resources between different centres by identifying strategic opportunities for greater efficiency and cooperation between them;
(e) Reduces the need for car journeys and reliance on the private car through a collocation of activities within higher order activity centres;
(f) Avoids ad-hoc development by focussing growth in appropriate activity centres ; and
(g) Informs decisions around the distribution of new infrastructure and development in a manner which supports sustainable development, access to services, and a vital and viable network of centres.

Following the information presented above, an example draft retail activity centre hierarchy for the Devonport local government area is presented in **Table 1** below. This draft hierarchy aims to identify the existing retail centres and their respective functions and attributes. It does not include centres where industrial uses represent the main activity (including areas of land zoned Light Industrial or General Industrial), nor does it seek to identify minor 'corner shop' type of retail environments.

Table 1: Example draft Retail Activity Centre Hierarchy for the Devonport LGA.

1	Primary Activity Centre		
Role	The major strategic centre and primary activity hub which provides a wide range of services and facilities also servicing a broader sub-regional catchment. Represents the priority centre for regional investments in economic and social infrastructure. Regional centre for higher order retail, commercial, entertainment and administrative activity.		Devonport CBD and immediate surrounds (including Fourways)
Core Functions			
	Employment	Provides a focus for employment at the sub-regional level. Retailing represents a major industry, complimented by a range of business and professional services including office and administration, and hospitality.	

[1] *Southern Tasmania Regional Land Use Strategy 2010-2035*.
[2] *Tasmanian Activity Centre Network*, Hill PDA Consulting (February 2014).
[3] *Ibid*.

1

	Retail and commercial Provision	Sub-regional shopping facilities with a range of major supermarkets, department stores, and a range of speciality shops.	
	Government services and community infrastructure	The centre is a focus for the location of government administrative services and facilities for the Federal and State Government, city council administration offices and also a range of specialised medical/health practitioners and related support services. Urban public spaces provide a focus for community facilities and events.	
	Residential	Opportunities for higher density residential use and mixed use development such as apartments and the like.	
	Entertainment and culture	A range of dining and entertainment options including markets, bars, cafes, restaurants, art galleries, and cinema.	
	Transport and access	Centre accommodates the key bus interchange, car parking, centralised road network and links to shared pathway.	
Planning scheme zone designations		Includes land within the Central Business Zone, General Business Zone and Urban Mixed Use Zone.	
Catchment		Catchment of regional significance across at least three adjacent LGAs (Latrobe, Central Coast, Kentish).	
2	**Local Suburban Centre**		
Role	To serve daily needs of surrounding community and provide a focus for day-to-day convenience needs within a community.		
Core Functions			
	Employment	May include a mix of retail, community and local health services and small scale business and professional services generally servicing the local suburban area.	East Devonport Spreyton
	Retail and commercial provision	Should include at least one supermarket complimented by a range of retail shops with a mixture of range and convenience.	
	Government services and community infrastructure	Local community services that may include post office, health services (including GPs) and childcare facilities.	
	Residential	Some residential may be interspersed/integrated throughout centre.	
	Entertainment and culture	May include some dining and entertainment options.	
	Transport and access	Predominately serviced by private transport. Walking connectivity from surrounding residential suburbs. Public transport links through suburban services.	
Planning scheme zone designations		Includes land within the Local Business Zone.	
Catchment		Generally serves a suburban level catchment but may attract a wider catchment on an occasional basis.	
3	**Peripheral Activity Centre**		
Role	Provides for a mixture of activity types suited for peripheral environments. Generally located at the periphery of urban centres and may also include linear activity strips along major arterial/collector roads.		William Street south of Fourways Linear strips along Don Road and Formby Road
Core Functions			
	Employment	Employment generally characterised by a mixture of retail and service activities that benefit from high levels of passing traffic in private vehicles.	
	Retail and commercial provision	Activity may be characterised by a genuine mix of use and development depending on the locality – although service industry, drive-through takeaway stores, and speciality bulky goods type stores may represent a predominant activity.	

2

	Government services and community infrastructure	May be some opportunity but limited focus for government or community infrastructure.	
	Residential	Depending on the locality, there may be some opportunity for residential development to be interspersed.	
	Entertainment and culture	May be some opportunity but limited focus for entertainment and culture infrastructure.	
	Transport and access	Located on major arterial routes, most retail and service activities benefit from high levels of private transport. Most businesses/services have car parking on site.	
Planning scheme zone designations		Includes land within the Urban Mixed Use Zone and Commercial Zone.	
Catchment		Generally serves a municipal level catchment although the location of these centres along major arterial roads may also capture a broader catchment.	
4	**Local Neighbourhood Centre**		
Role	Services the convenience needs of a local area predominantly at a localised neighbourhood scale.		
Core Functions			
	Employment	Employment options are generally focussed around convenience type activity.	Valley Road Forbes Street Southern East Devonport
	Retail and commercial provision	A focus on daily convenience needs which may include a grocery/convenience store, convenience related speciality shops such as a newsagent, pharmacy, gift store, bakery, salon, or the like. May also include some small scale food establishments including cafes and take away shops.	
	Government services and community infrastructure	May include some small scale local community services (such as GP, dentist, child health clinic, or the like).	
	Residential	Some residential may be interspersed throughout centre.	
	Entertainment and culture	No specific focus for entertainment and culture.	
	Transport and access	Walking connectivity from surrounding residential suburbs. Public transport links through suburban services. Predominately serviced by private transport.	
Planning Scheme zone designations		Includes land within the Local Business Zone.	
Catchment		Generally serves a local neighbourhood level catchment but may occasionally attract a wider suburban catchment.	
5	**Specialist Centre**		
Role	To provide for activity of a specialised nature including as defined through a unique local provision under the planning scheme (such as a specific area plan or particular purpose zone).		Devonport Homemaker Centre
Core Functions			
	Employment	Dependent on specific characteristics of the specialist centre.	
	Retail and commercial provision	Should reflect the specific purpose or defined character of the specialist centre.	
	Government services and community infrastructure	Unless otherwise identified as the specific purpose, limited opportunity for government services or community infrastructure use and development	
	Residential	Limited opportunity for residential use and development.	
	Entertainment and culture	Unless otherwise identified the specific purpose, there is limited opportunity for entertainment and culture	
	Transport and access	As required by specific purpose characteristics.	

Planning scheme zone designations	Includes land with a specific area plan overlay or a particular purpose zone to provide for a specific range of use and development.	
Catchment	Sub-regional catchment across at least three adjacent LGAs (Latrobe, Central Coast, Kentish) or as determined by the needs of specific purpose.	

Current and Previous Minutes Resolutions - August 2022					
Meeting Date	**Res No.**	**Item**	**Status**	**Assignees**	**Action Taken**
26/04/2022	22/71	Renaming of Don Reserve Hall	In progress	Governance Officer	Application to rename the parkland adjacent to the Don Memorial Hall, 'John Luck Park' lodged with Place Names Tasmania. The name, John Luck Park, has completed its required advertising period on the Place Names Tasmania website and has now been referred to the Place Names Advisory Panel (along with any submissions received) for deliberation.
23/05/2022	22/92	Disposal of portion of Public Land - Mersey Bluff	In progress	Governance Officer	21 day public notification process concluded Friday 21 June 2022, with all public notification requirements met. No public submissions were received during the notice period. Council Officers met with representatives from the Office of Aboriginal Affairs and Parks (Crown Land) to discuss progressing the transfer process.
27/06/2022	22/121	Signage Strategy 2022-2027	Completed	Infrastructure & Works Manager	Public consultation commenced July 12th.
27/06/2022	22/126	Partnership Agreements	Completed	Community Services Manager	Partners have been notified. Awaiting return of signed agreements
25/07/2022	22/141	Confirmation of Previous Minutes	Completed	Governance Officer	Minutes of the Council meeting held on 27 June 2022 confirmed.
25/07/2022	22/142	Responses to Questions Raised at Prior Meetings	Completed	Governance Officer	Responses to questions from the June 2022 Council meeting noted
25/07/2022	22/143	Questions on Notice from the Public	Completed	Executive Coordinator	Completed
25/07/2022	22/144	Regional recycling collection and processing	Completed	Executive Manager City Growth	Correspondence provided to Dulverton WM confirming the Council resolution.
25/07/2022	22/145	Devonport Open Space Strategy 2022-2032	Completed	Executive Coordinator	Strategy released for public consultation.
25/07/2022	22/146	Mobile Vending Guidelines	Completed	Executive Coordinator	Guidelines endorsed and available on the website.
25/07/2022	22/147	Sporting Event Sponsorship	Completed	Community Services Manager	All recipients have been notified via letter.
25/07/2022	22/148	Devonport Youth Advisory Group Terms of Reference	Completed	Community Services Manager	TOR finalised with endorsement date, to be included in Corporate Document Register.
25/07/2022	22/149	Election Caretaker Period Policy	Completed	Executive Coordinator	Policy adopted and is now available on Council's website.
25/07/2022	22/150	E-scooter Trial	In progress	Executive Manager City Growth	EOI document in development to appoint operator, with proposed trial start in October 2022.
25/07/2022	22/151	Workshops and Briefing Sessions held since the last Council Meeting	Completed	Governance Officer	Report received and information noted
25/07/2022	22/152	Mayor's Monthly Report	Completed	Governance Officer	Report received and noted
25/07/2022	22/153	General Manager's Report	Completed	Governance Officer	Formal notification of General Manager's appointment as Proxy Delegate for Owner's Representatives meetings provided to TasWater.
25/07/2022	22/154	Highfield Park Master Plan 2018-2028 - Year Four Status Update	Completed	Governance Officer	Report received and status of actions noted
25/07/2022	22/155	Cemetery Strategy 2011-2030 - Year Eleven Status	Completed	Governance Officer	Report received and status of actions noted
25/07/2022	22/156	General Management, People & Finance and Corporate Services Report - May and June 2022	Completed	Governance Officer	Report received and noted
25/07/2022	22/157	Convention and Arts Report - May and June 2022	Completed	Governance Officer	Report received and noted
25/07/2022	22/158	Community Services Report - May and June 2022	Completed	Governance Officer	Report received and noted
25/07/2022	22/159	Elected Members Expense Report to 30 June 2022	Completed	Governance Officer	Report received and noted
25/07/2022	22/160	Unconfirmed Minutes Devonport City Council Audit Panel	Completed	Governance Officer	Report received and noted

Minutes of the Planning Authority Committee of the Devonport City Council held in the Aberdeen Room, Level 2, paranaple centre,137 Rooke Street, Devonport on Monday 8 August 2022 commencing at 5:15 PM

Present	Cr A Rockliff (Mayor) in the Chair Cr J Alexiou Cr P Hollister Cr L Murphy Cr L Perry
Councillors in Attendance	Cr L Laycock
Council Officers:	General Manager, M Atkins Deputy General Manager, J Griffith Executive Manager - People & Finance,K Peebles Development Services Manager, K Lunson Senior Town Planner, C Milnes
Audio Recording:	All persons in attendance were advised that it is Council policy to record Council meetings, in accordance with Council's Digital Recording Policy. The meeting was live streamed via YouTube.

1 APOLOGIES

The following apology was received for the meeting.

Cr S Milbourne Leave

2 DECLARATIONS OF INTEREST

The following Declarations of Interest were advised:

Councillor	Item No	Reason	Remain in meeting? Yes/No	If remaining, reason/s for decision
Cr L Murphy	4.1	Engaged in real estate industry	Yes	Is not known to the proponent nor had any known dealings with proponent
Cr J Alexiou	4.1	Owns property close to applicant	No	

3 DELEGATED APPROVALS

3.1 PLANNING APPLICATIONS APPROVED UNDER DELEGATED AUTHORITY

PAC22/10 RESOLUTION

MOVED: Cr Murphy
SECONDED: Cr Perry

That the list of delegated approvals be received.

FOR: Cr Alexiou, Cr Hollister, Cr Murphy, Cr Perry and Cr Rockliff
AGAINST: Nil

CARRIED 5 / 0

4 DEVELOPMENT REPORTS

4.1 PA2022.0112 - 24 CAMERAY STREET EAST DEVONPORT - RESIDENTIAL (SINGLE DWELLING)

Cr J Alexiou left the meeting at 5:17pm.

PAC22/11 RESOLUTION

MOVED: Cr Perry
SECONDED: Cr Murphy

That the Planning Authority, pursuant to the provisions of the *Tasmanian Planning Scheme – Devonport 2020* and Section 57 of the *Land Use Planning and Approvals Act 1993*, approve application PA2022.0112 and grant a Permit to use and develop land identified as 24 Cameray Street, East Devonport for the following purposes:

- Residential (single dwelling)

Subject to the following conditions:

1. The Use and Development is to proceed generally in accordance with the submitted plans referenced as Proposed Residence, Drawing No. A100-A105 & A124, Rev A, dated 01/09/2021 by n+b design, copies of which are attached and endorsed as documents forming part of this Planning Permit.
2. Stormwater collected from this work, including surface water from the driveway &/or any paved areas, is to be drained into the existing property stormwater pipe in accordance with the National Construction Code.
3. Stormwater discharge from the proposed development is to be hydraulically detailed and designed by a suitably qualified hydraulic engineer, for all storm events and for a suitable range of storm durations to identify peak discharge flows up to 20-year ARI only. As part of their design, the hydraulic engineer is to limit stormwater discharge from the proposed development, by utilising a combination of pipe sizing and/or on-site detention, to that equivalent to only 50% of the development site being impervious. There is to be no uncontrolled overland flow discharge from the proposed development to any of the adjoining properties, for all the above nominated storm events. All design calculations are to be submitted for approval by the City Engineer prior to any subsequent building permit applications.

Note: The following is provided for information purposes.

The development is to comply with the requirements of the current National Construction Code. The developer is to obtain the necessary building and plumbing approvals and provide the required notifications in accordance with the *Building Act 2016* prior to commencing building or plumbing work.

Hours of Construction shall be: Monday to Friday Between 7am - 6pm, Saturday between 9am -6pm and Sunday and statutory holidays 10am - 6pm.

During the construction or use of these facilities all measures are to be taken to prevent nuisance. Air, noise and water pollution matters are subject to provisions of the *Building Regulations 2016* or the *Environmental Management and Pollution Control Act 1994*.

No burning of any waste material is to be undertaken on site. All waste material is to be removed and disposed of at a licensed refuse waste disposal facility.

In regard to condition 3 the applicant should contact Council's Infrastructure & Works Department – Ph 6424 0511 with any enquiries.

Enquiries regarding other conditions can be directed to Council's Development Services Department – Ph 6424 0511.

FOR:	Cr Hollister, Cr Murphy, Cr Perry and Cr Rockliff
AGAINST:	Nil

CARRIED 4 / 0

5 CLOSURE

Cr J Alexiou returned to the meeting at 5:19pm.

There being no further business on the agenda the Mayor declared the meeting closed at 5:19pm.

Confirmed

Chairperson