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Southern Beaches Structure Plan

Economic Analysis | Retail, Commercial and Industrial

Prepared by Urban Enterprise for Era Advisory, on behalf of Sorell Council

April 2026 | Final Draft

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Acknowledgment of Country

We acknowledge the traditional custodians of the land on which we work and pay our respects to their Elders past and present.

Version Control

Issue:	Date:	Description:	Reviewed:
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1. Introduction

1.1. Background

Urban Enterprise was engaged by Era Advisory, on behalf of Sorell Council to prepare economic analysis to inform the preparation of the Southern Beaches Structure Plan.

The Structure Plan is intended to coordinate the strategic direction for land use, infrastructure, environmental management and place-making decisions across these villages, providing an integrated response to future growth and change.

Engagement

Urban Enterprise has been engaged to provide economic analysis to underpin the preparation of the Structure Plan, with a focus on demographic and economic analysis, and retail and employment land demand and supply.

The purpose of this report is to provide an evidence-based understanding of population, employment, retail and business land dynamics within the Southern Beaches. The findings are intended to inform the preparation of the Structure Plan, including implications for retail, commercial and industrial land use, activity centres and employment-related planning provisions.

The scope of the engagement includes:

- Preparation of a community, housing and economic profile;
- Retail needs assessment; and
- Commercial and industrial land assessment.

This report forms part of the technical background material supporting the Southern Beaches Structure Plan.

Assumptions and Limitations

The analysis adopts a planning horizon to 2046, consistent with State and regional population forecasts and the anticipated lifespan of the Structure Plan.

The analysis is based on a review of secondary data sources, including ABS Census and population estimates, dwelling approvals, retail spending data, land use and zoning analysis, population forecasts, and targeted stakeholder consultation.

Retail demand modelling incorporates defined trade areas, existing population forecasts and expenditure estimates to assess supportable floorspace over time.

The analysis is based on available data at the time of preparation. While recent datasets have been used where possible, some indicators, particularly Census data, reflect conditions as at 2021.

Residential land demand and supply have not been analysed as part of this engagement.

Forecasts and demand estimates should therefore be interpreted as indicative and subject to market conditions, infrastructure provision and future planning decisions.

Report Structure

The report is set out in the following chapters:

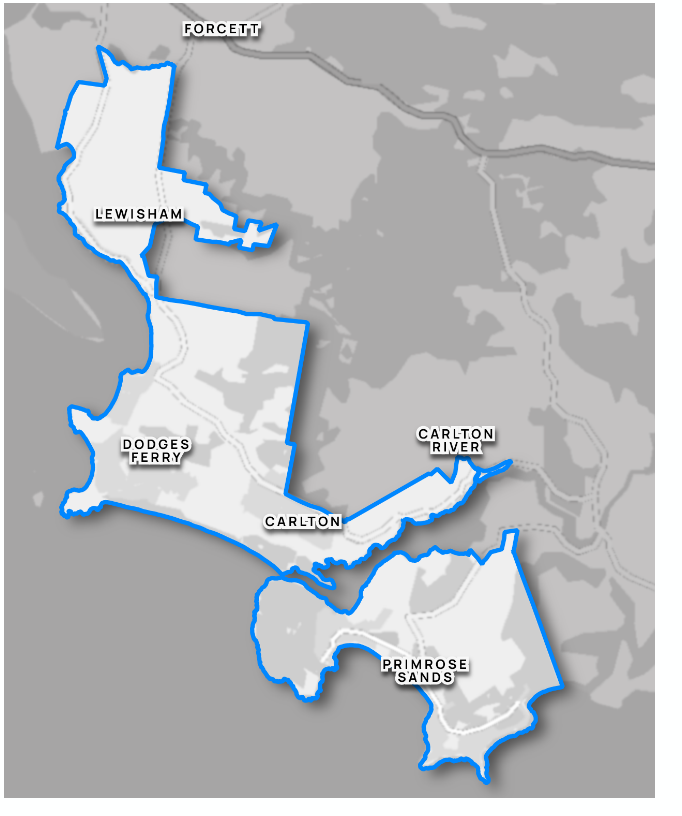
- Chapter 2 provides a community, housing and economic profile of the Southern Beaches.
- Chapter 3 outlines the relevant state, regional and local policy context.
- Chapter 4 reviews the existing supply of business and employment land.
- Chapter 5 assesses retail activity, demand and floorspace needs and implications for the Structure Plan.
- Chapter 6 considers commercial and industrial land demand and implications for the Structure Plan.

1.2. Study Area

The Southern Beaches is a collection of suburbs and settlements south of the Sorell township and within the Sorell Local Government Area (LGA).

The study area for the Structure Plan is shown at Figure 1, this includes the key settlements of Lewisham, Dodges Ferry, Carlton, Carlton River and Primrose Sands.

Figure 1: Study Area



2. Community, Housing and Economic Profile

2.1. Introduction

This Community, Housing and Economic Profile focuses on analysis of population, demographic and housing data related to the study area.

The analysis includes benchmarking against the Sorell Local Government Area (LGA) and the Greater Hobart Statistical Area where relevant.

Data Sources

The Community, Housing and Economic Profile is based solely on analysis of secondary data sources and does not include primary research or original data collection.

The Profile has been prepared through review and analysis of the following data sources:

- ABS Census of Population and Housing, 2011, 2016 and 2021.
- ABS Regional Population Estimates, 2023-24.
- Real Estate Institute of Tasmania Suburb Reports.

The most recent release of ABS Census data is from 2021, and therefore analysis of ABS population, demographic and economic data does not capture changes that have occurred since that time.

More recent datasets, including dwelling approvals and house prices have been used to provide additional more recent context where relevant and available.

2.2. Spatial Data Areas

A range of spatial data has been compiled and analysed relevant to the study area, including localities (suburbs) and Statistical Area 1 areas (SA1s). Further description of these areas is provided below:

- **Localities (Suburbs)** – Population and demographic data has been sourced for localities relevant to the study area, including Lewisham, Dodges Ferry, Carlton, Primrose Sands, Carlton River and Forcett (refer Figure 2). Analysis at the locality level enables detailed population and demographic profiling, as well as comparisons across areas relevant to the study area.

  While the Forcett township itself does not fall within the study area boundary, a portion of the broader Forcett locality overlaps with the study area and contains existing housing and population (as shown in Figure 2).

  It is noted that locality boundaries differ between 2011, 2016 and 2021; however, these variations are not considered to materially affect the analysis.

- **Statistical Area 1 (SA1s) –** Select population and dwelling approvals data has been compiled using aggregations of Statistical Area Level 1 (SA1) boundaries (refer Figure 3). The selected SA1s broadly align with the study area boundary, although parts of Carlton River and a small portion of land in the north-east of the study area fall outside the selected SA1 geography and are therefore not captured.

  Consistent with the locality analysis, the Forcett SA1 has been included as a portion of this area overlaps with the study area (noting that the Forcett township does not fall within the study area boundary).

Figure 2: Localities, 2021

Figure 3: SA1s, 2021

2.3. Population

Historic Growth

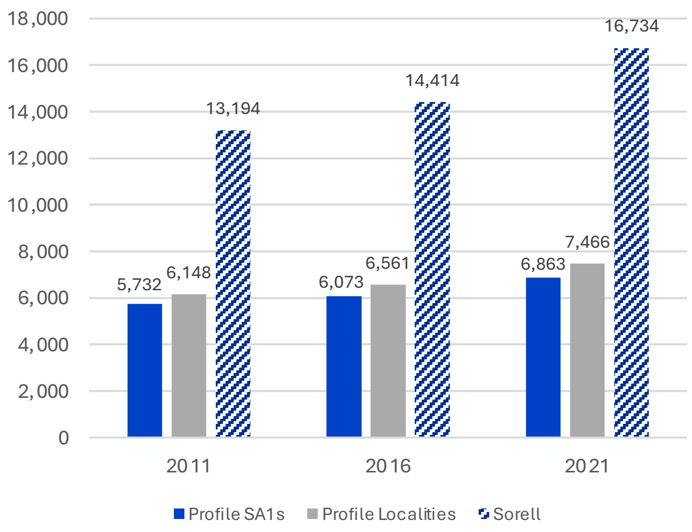
Historic population growth has been assessed for the profile area SA1s and Localities (see Figure 4).

In 2021, the SA1 profile area recorded a population of 6,863 residents, compared to 7,466 residents across the broader localities profile area.

The population of the SA1 profile area grew at an average rate of 2.5% p.a. between 2016 and 2021, compared to 2.6% p.a. for the locality profile area. This rate of growth was slightly less than that of the broader Sorell LGA over the same period (3% p.a.).

Dodges Ferry is the largest suburb by population in the Southern Beaches (2,646 residents), making up 35% of the area's population, followed by Carlton (18%) and Primrose Sands (16%). Carlton experienced the highest level of population growth between 2016 and 2021, increasing by close to 50 residents per year.

Figure 4: Usual Resident Population, 2011 - 2021



Source: ABS Census of Population and Housing, 2011, 2016 and 2021.

Table 1: Usual Resident Population, Localities and SA1s, 2016 - 2021

Locality	2016	2021		Change 2016-21		
	#	#	%	Total	AAG	AAGR %
Carlton (Tas.)	1,118	1,363	18%	245	49	4.0%
Carlton River	269	347	5%	78	16	5.2%
Dodges Ferry	2,471	2,646	35%	175	35	1.4%
Forcett	961	1,102	15%	141	28	2.8%
Lewisham (Tas.)	691	799	11%	108	22	2.9%
Primrose Sands	1,051	1,209	16%	158	32	2.8%
Total Localities	**6,561**	**7,466**	**100%**	**905**	**181**	2.6%
Total Localities (excluding Forcett)	5,600	6,364		764	153	2.6%
Total SA1s	**6,073**	**6,863**		**790**	**158**	2.5%
Total SA1s (excluding Forcett)	5,675	6,425		750	150	2.5%
Sorell LGA	14,414	16,734		2,320	464	3.0%

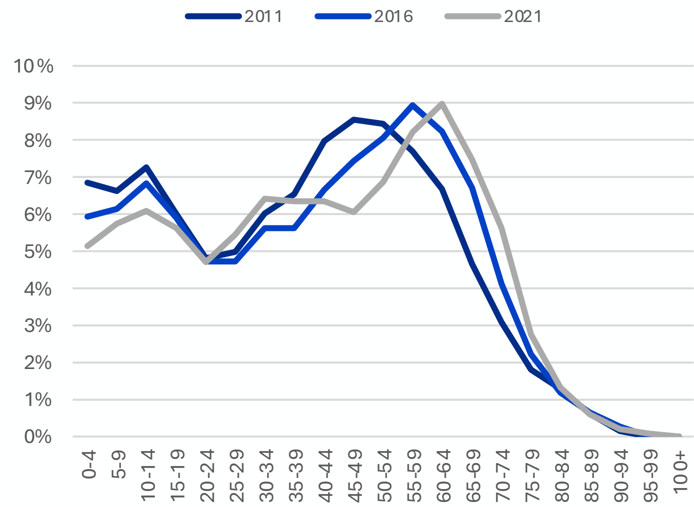
Source: ABS Census of Population and Housing, 2016 and 2021.

Age Profile

The age profile of residents in the profile area is weighted towards older age cohorts, including older working-age residents and pre-retirees, with over 40% of residents aged 50 years and over. The population aged between 2011 and 2021, reflected in a declining share of residents aged under 20 and an increasing proportion of residents aged over 60.

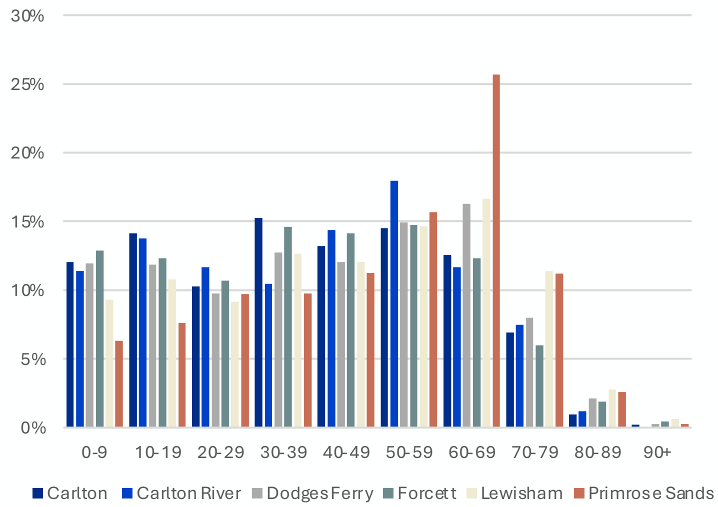
The age profile varies across the profile area localities, with Primrose Sands characterised by an older population profile, while Carlton and Carlton River have comparatively higher proportions of families and younger households, reflecting an overall younger age demographic.

Figure 5: Historic Age Profile Change, Total Localities, 2011 - 2021



Source: ABS Census of Population and Housing, 2011, 2016 and 2021.

Figure 6: Historic Age Profile, Localities, 2021



Source: ABS Census of Population and Housing, 2021

2.4. Households

Household Composition

In 2021, the most common household types in the profile area were couples with no children (29%), lone person households (26%), and families with children (24%) (Figure 7 & 8).

Between 2011-2021, the profile area experienced growth in couples with no children and a moderate decline in families with children, while other non-classifiable and visitor-only households also increased (Figure 7).

Compared to Greater Hobart, the profile area has a lower proportion of families with children, lone person households and group households, and a higher representation of couples with no children, as well as other non-classifiable and visitor-only households (Figure 8).

Household Size

The average household size across the profile area was 1.8 persons per dwelling in 2021, reflecting the area's older age profile and higher share of smaller households. Household sizes vary across suburbs, with larger households in Forcett (2.6 persons) and the smallest in Primrose Sands (1.1 persons), while most other suburbs average around 2.1 persons per dwelling (Table 2).

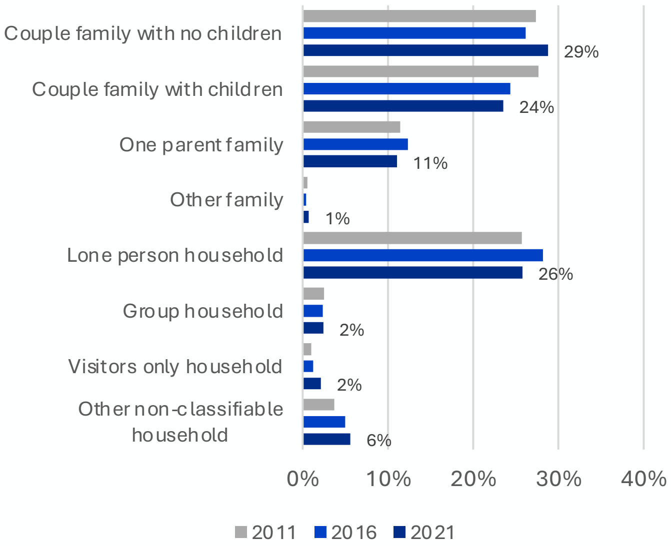
Household Income

The median weekly household income was $1,425 in 2021, slightly below Greater Hobart ($1,542). The lower median weekly income may reflect the older population, with lower levels of workforce participation (Table 2).

Tenure

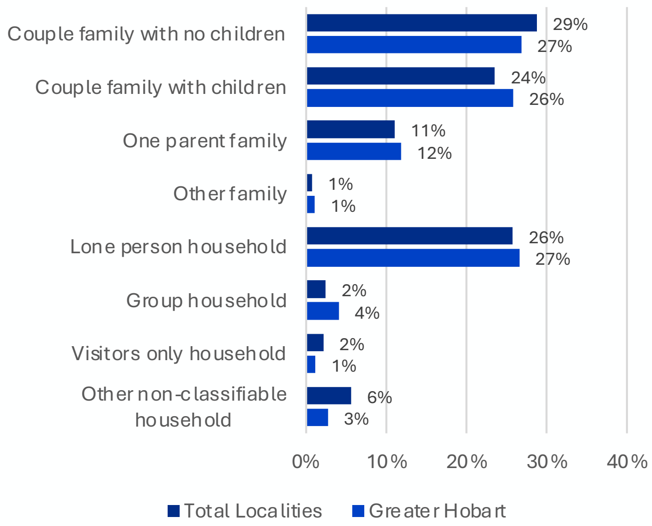
Home ownership (with or without a mortgage) is the dominant tenure type in the profile area. Compared to Greater Hobart, the area has a higher proportion of owner-occupiers and a lower share of rental households (Figure 9).

Figure 7: Household Composition Change, Total Localities, 2011 - 2021



Source: ABS Census of Population and Housing, 2011, 2016 and 2021

Figure 8: Household Composition, Total Localities compared to Greater Hobart, 2021



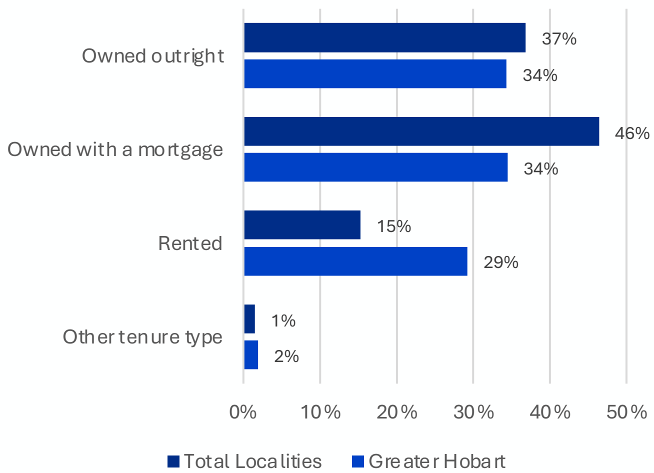
Source: ABS Census of Population and Housing, 2021

Table 2: Average household size and Median Weekly Household Income, Localities, 2021

Locality	Average Household Size	Median Household Income (Weekly)
Carlton (Tas.)	2.1	$1,425
Carlton River	2.1	$1,352
Dodges Ferry	1.9	$1,412
Forcett	2.6	$1,797
Lewisham (Tas.)	2.1	$1,648
Primrose Sands	1.1	$922
Total Localities	1.8	$1,425
Greater Hobart	*2.4*	*$1,542*

Source: ABS Census of Population and Housing, 2021

Figure 9: Tenure Type, Total Localities compared to Greater Hobart, 2021



Source: ABS Census of Population and Housing, 2021

2.5. Labour force

Resident Employment

In 2021, there were 3,508 employed residents in the profile area (46% of residents).

The Construction sector (15%) and Healthcare sector (15%) were the most common sectors of employment among residents. Public administration and safety (10%), education and training (9%) and retail trade (8%) were also key industries for employed residents (Table 3).

Compared to Greater Hobart, the profile area had a significantly higher proportion of residents employed in the Construction sector, and a slightly lower proportion of residents employed in Healthcare.

Qualifications

The profile area residents have a lower proportion of residents with a bachelor degree or higher compared to Greater Hobart, and a higher proportion with Certificate III and IV qualifications, typically associated with a higher proportion of skilled trades and service sector jobs (Figure 10).

Occupations

The profile area has a higher proportion of technicians and trades workers and labourers, and a lower proportion of professionals and managers compared to Greater Hobart (Figure 11).

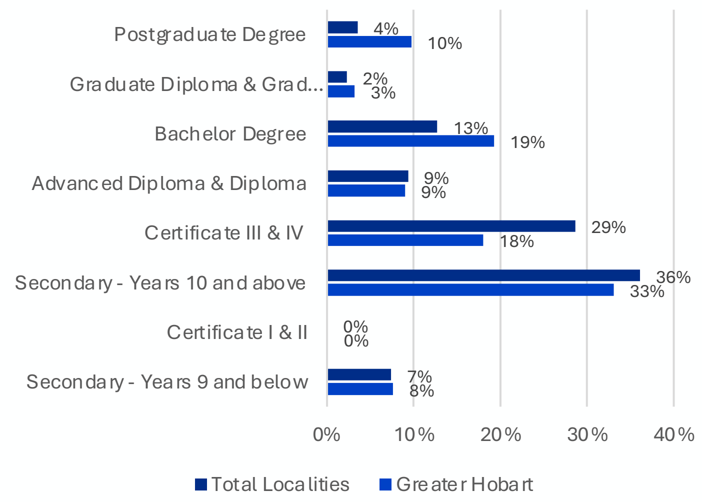
Table 3: Resident Employment by Industry Sector, Total Localities & Greater Hobart, 2021

Industries	Total Localities		Greater Hobart
	#	%	%
Construction	524	15%	9%
Health Care and Social Assistance	497	15%	17%
Public Administration and Safety	326	10%	10%
Education and Training	310	9%	11%
Retail Trade	285	8%	10%
Manufacturing	224	7%	5%
Accommodation and Food Services	204	6%	8%
Professional, Scientific & Technical Services	171	5%	7%
Other Services	156	5%	4%
Administrative and Support Services	136	4%	3%
Transport, Postal and Warehousing	123	4%	3%
Electricity, Gas, Water & Waste Services	90	3%	2%
Agriculture, Forestry and Fishing	89	3%	2%
Arts and Recreation Services	72	2%	2%
Wholesale Trade	58	2%	2%
Rental, Hiring and Real Estate Services	48	1%	1%
Financial and Insurance Services	45	1%	2%
Information Media & Telecommunications	23	1%	1%
Mining	15	0%	0%
Total*	**3,508**	**100%**	**100%**

Source: ABS Census of Population and Housing, 2021

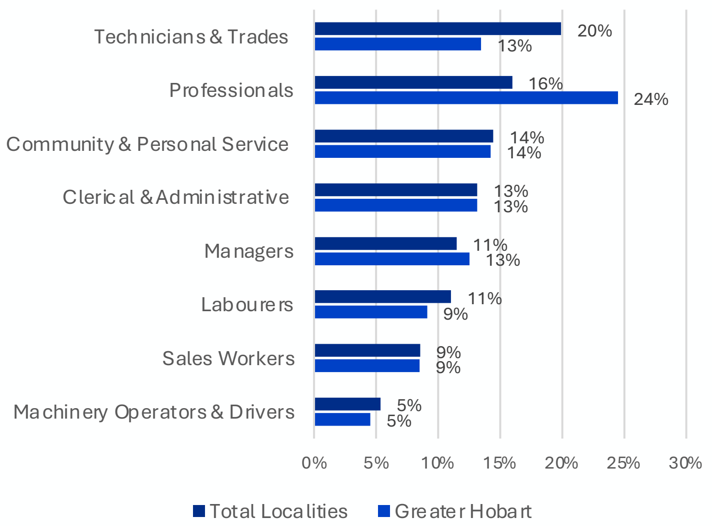
*Total jobs includes those that were not stated or inadequately described by industry sector. Percentages are calculated excluding not stated/inadequately described responses.

Figure 10: Highest Qualification, Total Localities & Greater Hobart, 2021



Source: ABS Census of Population and Housing, 2021

Figure 11: Resident Occupations, Total Localities & Greater Hobart, 2021



Source: ABS Census of Population and Housing, 2021

Place of Work

Table 4 provides Journey to work data, indicating the top 10 locations (at SA2 level) that the profile area residents commute to for work.

Many profile area residents commute outside the area for work. Around 20% of employed residents travel to Hobart for work, while 17% work within the Dodges Ferry – Lewisham area.

A further 14% are employed in the Sorell – Richmond area (encompassing the township of Sorell). The remaining employed residents primarily commute towards employment areas closer to Hobart, including locations along the Tasman Highway corridor and the northern suburbs.

2.6. Local Employment

Jobs

In 2021, there were approximately 688 local jobs in the profile area. Construction, education and training and accommodation and food services were the top three industries of local employment in the Southern Beaches (Table 5).

The profile area saw local jobs increase by 205 between 2016 and 2021. The largest growth industries included education and training (+36), accommodation and food services (+30) and professional, scientific and technical services (+30).

Table 4: Place of Work, Localities Residents, 2021

Top 10 SA2s	Total Localities	
	#	%
Hobart	694	20%
Dodges Ferry - Lewisham	573	17%
Sorell - Richmond	471	14%
POW No Fixed Address (Tas.)	267	8%
Cambridge	264	8%
Derwent Park - Lutana	141	4%
Mornington - Warrane	119	3%
Moonah	115	3%
Bellerive - Rosny	105	3%
Glenorchy	77	2%

Source: ABS Census of Population and Housing, 2021

Table 5: Total Localities Employment by Industry, 2021

Industries	Total Localities		Growth 2016 -21
	#	%	
Construction	111	17%	+22
Education and Training	90	14%	+36
Accommodation and Food Services	68	10%	+30
Professional, Scientific and Technical Services	58	9%	+30
Retail Trade	53	8%	-7
Health Care and Social Assistance	49	7%	+4
Manufacturing	45	7%	+17
Other Services	37	6%	+19
Agriculture, Forestry and Fishing	34	5%	+9
Administrative and Support Services	30	5%	+1
Transport, Postal and Warehousing	25	4%	+7
Arts and Recreation Services	19	3%	+14
Wholesale Trade	14	2%	+9
Electricity, Gas, Water and Waste Services	13	2%	+3
Public Administration and Safety	9	1%	+6
Rental, Hiring and Real Estate Services	7	1%	+4
Financial and Insurance Services	3	0%	+3
Mining	0	0%	+0
Information Media and Telecommunications	0	0%	+0
Total	**688**	**100%**	**+205**

Source: ABS Census of Population and Housing, 2021

2.7. Dwellings

Dwellings

In 2021, the profile area contained approximately 4,050 dwellings, representing around 50% of total dwellings within the Sorell LGA (Table 6). Between 2016 and 2021, dwelling stock increased by around 400 dwellings, equating to an average annual growth rate of 2.1% (approximately 81 dwellings per year), which was below the broader LGA growth rate of 2.7% per annum.

Dwelling Occupancy

Dwelling occupancy across the profile area increased between 2011-2021, rising from 73% in 2011 to 77% in 2021. Occupancy rates vary by suburb, with Primrose Sands historically recording lower occupancy levels, while Forcett, Carlton and Lewisham have generally experienced higher occupancy rates. Carlton River experienced the highest change in dwelling occupancy, growing from 66% in 2011 to 84% in 2021.

Bedrooms

Three-bedroom homes are the most common sized dwelling in the profile area , comprising 50% of all dwellings, followed by two-bedroom (23%) and four-bedroom homes (18%) (Figure 13).

Median House Prices

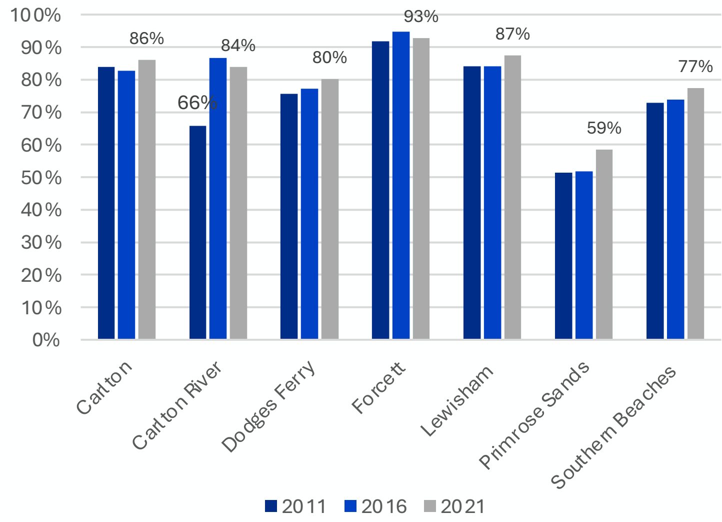
Figure 14 show median house prices for suburbs within the profile area over the past 20 years. Median house prices vary across suburbs, ranging from $488,000 in Primrose Sands to $850,000 in Lewisham. All suburbs have seen significant price growth over the past 20 years, with average annual growth accelerating over the last decade, particularly during the Covid-19 period.

Table 6: Historic Dwelling Growth, Localities, 2011 - 2021

Locality	2016	2021		Change 2016-21		
	#	#	%	Total	AAG	AAGR %
Carlton (Tas.)	549	643	16%	+94	+19	3.2%
Carlton River	127	164	4%	+37	+7	5.2%
Dodges Ferry	1,285	1,377	34%	+92	+18	1.4%
Forcett	356	420	10%	+64	+13	3.4%
Lewisham (Tas.)	335	366	9%	+31	+6	1.8%
Primrose Sands	989	1,078	27%	+89	+18	1.7%
Total Localities	**3,641**	**4,048**	**100%**	**+407**	**+81**	**2.1%**

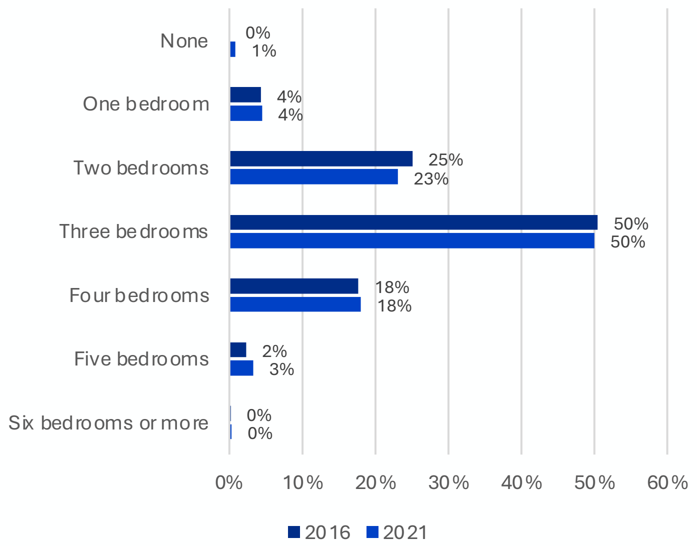
Source: ABS Census of Population and Housing, 2011, 2016 and 2021

Figure 12: Dwelling Occupancy Change, Total Localities, 2011 - 2021



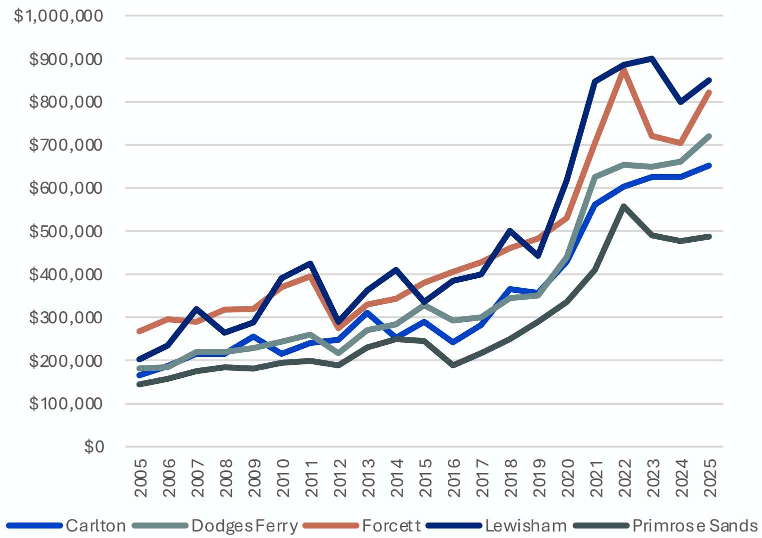
Source: ABS Census of Population and Housing, 2011, 2016 and 2021

Figure 13: No. of Bedrooms In Dwelling, Total Localities, 2016 - 2021



Source: ABS Census of Population and Housing, 2016 and 2021

Figure 14: Median House Price Growth, Localities, 2005 - 2025



Source: Real Estate Institute of Tasmania Suburb Reports, 2025

2.8. Dwelling Approvals

Table 7 shows historical dwelling approvals for the profile area localities.

Between 2015 and June 2025 (year to date), approximately 460 dwellings were approved in the profile area. Between 2015 and 2024, approvals averaged around 45 dwellings per year, peaking at 60 in 2021 during the period of Government homebuilding incentives and policy stimulus.

The suburbs of Dodges Ferry, Primrose Sands and Carlton have seen the highest level of approvals over the last decade, with Lewisham and Forcett seeing fewer over this period.

Figure 15 shows total dwelling approvals over the past decade across the profile area. Dwelling approvals have trended downward in recent years (2022, 2023, and 2024). Between 2015 and 2021 (inclusive), there was an average of 48 dwellings approved per annum, which dropped to an average of 36 dwelling approvals between 2022 and 2024 (inclusive.). This decline could be reflective of increasing land and housing supply constraints, or also demand limitations associated with more challenging economic conditions in recent years.

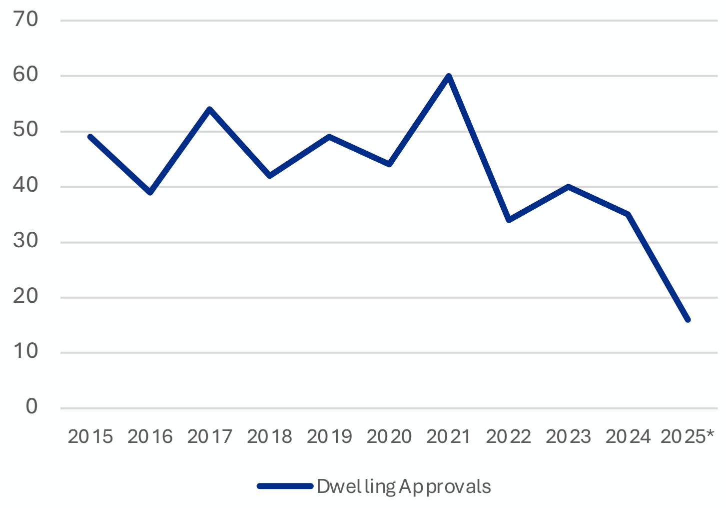
Table 7: Dwelling Approvals by SA1s (collated), 2015 – 2025 YTD.

SA1s*	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025^	Ave. 2015 - 24	Total 2015-25^
Carlton	9	14	16	11	13	9	16	4	11	2	4	11	109
Dodges Ferry	11	9	21	11	14	16	22	10	12	17	2	14	145
Forcett	4	2	0	1	2	0	0	0	0	3	1	1	13
Lewisham	7	5	7	5	8	7	5	5	6	5	4	6	64
Primrose Sands	18	9	10	14	12	12	17	15	11	8	5	13	131
Dwelling Approvals	49	39	54	42	49	44	60	34	40	35	16	45	462

Source: ABS Dwelling Approvals, 2015 – 2025 (^YTD to June 2025)

*Collation of SA1s that have approximate alignment to the suburb/locality.

Figure 15: Dwelling Approvals Trend, SA1s (collated), 2015 – 2025 YTD.



Source: ABS Dwelling Approvals, 2015 – 2025 (YTD to June 2025)

2.9. Key Points

- There is no exact statistical area that aligns to the study area boundary, however, analysis of SA1 data shows as of 2021, the population was in the order of 6,863 residents, whilst the broader locality profile area recorded a population of 7,466 residents. The majority of residents are concentrated around Dodges Ferry and Carlton.
- The area has experienced high population growth in recent years (circa 2.5% p.a. between 2016-2021). This growth may have somewhat moderated more recently due to a slowdown in residential dwelling approvals (which may be reflective of supply constraints and/or changes in economic and housing delivery conditions in recent years).
- The population is relatively older and ageing, reflected in a high proportion of couple-only and lone-person households, and a lower average household size.
- Around half of residents are employed, with strong representation in construction and trades, health care, public administration, and education and training, consistent with the workforce which has a high proportion of people with vocational and skilled trade qualifications.
- The area functions primarily as a residential settlement, with most residents commuting outside the study area for employment. Hobart is the most common employment destination. Approximately 17% of residents work locally, with a further 14% employed within Sorell.
- Dwelling growth broadly tracked population growth between 2016 and 2021. Dwelling occupancy rates increased by around 5% between 2011 and 2021, indicating growth in the permanent resident population, potentially accelerated during the pandemic alongside house price growth.
- There is a mismatch between household size and dwelling stock, with a prevalence of three-bedroom dwellings alongside a high share of lone-person households.
- Dwelling approvals have averaged approximately 45 per annum over the past decade, however approvals declined notably between 2022 and 2024, and this trend appears to have continued through the first half of 2025.

3. Strategic and Policy Context

3.1. Introduction

The following provides a summary of policy and strategy relevant to retail, commercial and industrial needs.

3.2. State Policy

Tasmanian Planning Policies (TPPs)

The Tasmanian Planning Policies are the highest-level land use planning policies in the state, coming into effect on 1 July 2026.

They set out common land-use planning aims to be applied consistently across the state, covering issues such as sustainable development, environmental protection, community wellbeing, liveability, and the effective integration of land use and infrastructure. Key policies and points include:

1.0. Settlement

Settlement requires that sufficient land is allocated to meet the community's needs for housing, commerce, recreation, open space and community facilities. When applied in their entirety, the TPPs support the planning system to deliver future development in a coordinated, cost effective and environmentally responsible way.

Relevant headline policy areas and objectives include:

- **1.1. Growth** - To plan for settlement growth that allocates land to meet the existing and future needs of the community and to deliver a sustainable pattern of development.
- **1.2. Liveability** - To improve the liveability of settlements by promoting a pattern of development that improves access to housing, education, employment, recreation, nature, health and other services that support the wellbeing of the community.
- **1.3. Social Infrastructrue** - To support the provision of adequate, accessible and inclusive social infrastructure to promote the health, education, safety and wellbeing of the community.
- **1.4. Settlement Types** - To plan for the sustainable use and development of settlements that have particular characteristics or values.
- **1.5. Housing** - To provide for a sufficient supply of diverse housing stock, including social and affordable housing, that is well-located and well-serviced to meet the existing and future needs of Tasmanians.
- **1.6. Design** - To create functional, connected and safe urban spaces that positively contribute to the amenity, sense of place and enjoyment experienced by the community.

4.0 Sustainable Economic Development

Sustainable Economic Development focuses on identifying and supporting our economic advantages, to deliver economic growth in a socially and environmentally responsible way.

The policy supports economic activity through the planning system by embedding the following principles:

- allocating sufficient land in appropriate locations to support various economic activities;
- protecting allocated land from incompatible use and development;
- supporting the efficient use of infrastructure and coordinated delivery of new infrastructure, including digital infrastructure;
- identifying and supporting emerging and innovative industries;
- promoting diversification to strengthen the resilience of the economy; and
- protecting the resources and values that are relied on for sustainable economic development.

Relevant headline policy areas and objectives include:

- **Tourism** - To promote the sustainable development of the State's tourism industry.
- **Industry** - To protect industrial land, facilitate sustainable industrial use and development and ensure there is sufficient availability of suitable industrial land to meet the existing and future needs of Tasmania.
- **Business and Commercial** - To promote business and commercial activities at a scale and intensity suited to the location to support diverse economic and employment opportunities and strengthen the State's economy.

Statewide Industrial Land Strategy (2025)

The *Statewide Industrial Land Study (2025)* identifies a projected shortfall of industrial land within the Southern Region, with Sorell LGA specifically experiencing a significant deficit. While the report notes that Tasmania demonstrates an overall statewide surplus of industrial land over a 20-year horizon, supply is unevenly distributed and constrained in key urban LGAs.

The Study forecasts a requirement of approximately 12–15 hectares of additional industrial land for Sorell over the next 20 years. The report notes that Sorell has no vacant zoned industrial land available. This results in a projected shortfall of approximately 12–14 hectares under low and high growth scenarios.

The Study attributes this constraint in part to infrastructure servicing limitations, noting that long-term wastewater solutions, including expansion of the Penna treatment plant, are required to address industrial land shortages in Sorell.

The Study does not allocate a specific industrial land requirement to the Southern Beaches. However, it identifies the need to prioritise retention of employment land in Dodges Ferry, while balancing rural-industrial uses with servicing challenges.

3.3. Regional Policy

Southern Tasmania Regional Land Use Strategy

The Southern Tasmania Regional Land Use Strategy (STRLUS) sets the long-term strategic direction for land use and development across Southern Tasmania (including the Sorell LGA). First created in 2011 and most recently amended in 2025 (currently still in draft form), the strategy is being updated to reflect changing regional conditions, such as population growth, housing pressures, and shifts in the planning system, to ensure it continues to shape a resilient, well-planned future for the region

The STRLUS spatially applies the TPPs including through identifying areas of growth for housing, business or industry into the future.

The draft STRLUS proposes a suite of regional strategies and statements of intent. Those most relevant to this assessment include:

1. **Growth management** - Cities, towns and villages grow sustainably and efficiently. Our communities are supported as they grow and change, and are diverse, connected and productive.
2. **Sustainable Economic Growth** - Planning facilitates investment and supports a diverse, sustainable, and resilient economy underpinned by the region’s unique environment, qualified and skilled workforces, infrastructure capacity, and accessible employment and economic precincts.

Role and Function of Towns and Villages

Whilst the study are presents a largely contiguous settlement, sub-locations are individually identified and classified in the draft STRLUS (see Table 8).

Dodges Ferry is classified as a ”Town”, with its role and function identified as a satellite, tourist destination and transforming.

Calton Beach, Lewisham and Primrose Sands are identified as ”Villages”, with their role and function nominated as satellite and tourist destination (Carlton), satellite (Lewisham) and tourist destination and transforming (Primrose Sands).

The draft STRLUS notes that “residential development to support population growth outside Metropolitan Hobart is to be prioritised in towns that have a nominated growth boundary”, this includes parts of the study area a shown in Figure 16.

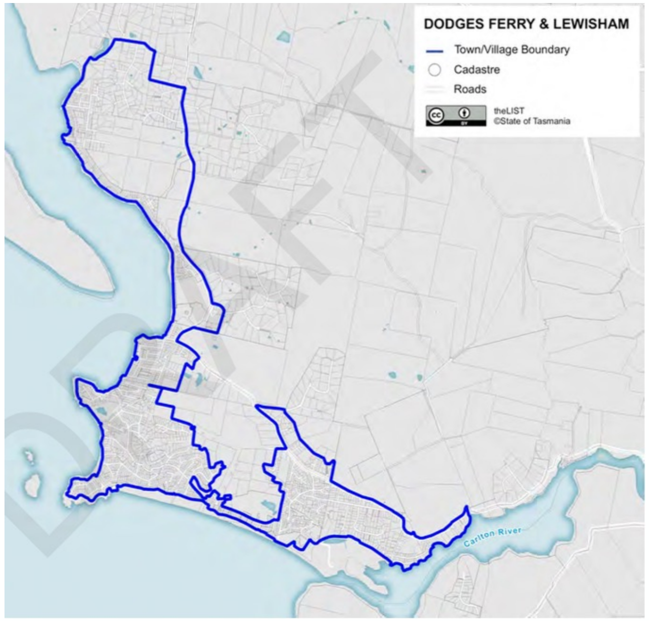
The STRLUS includes guidance on residential development and growth (noting this is not a focus of this report). For tourist destination town and villages, the draft STRLUS notes that proposed growth should address the needs of permanent residents and accommodation for visitors, primarily within town or village boundaries or within existing residential or village zoned land.

Table 8: Role and Function of Towns and Villages

Location	Classification	Role and Function
Carlton Beach	Village	• Satellite • Tourist Destination
Dodges Ferry	Town	• Satellite • Tourist Destination • Transforming
Lewisham	Village	• Satellite
Primrose Sands	Village	• Tourist Destination • Transforming

Source: STRLUS, Draft, 2025

Figure 16: Dodges Ferry and Lewisham (area with nominated boundary as per STRLUS)



Source: STRLUS, Draft, 2025

Activity Centres

The draft STRLUS identifies Activity Centre classifications, as summarised in Table 9.

Sorell is identified as a District Centre (see Figure 17). No Activity Centre classification is provided for towns within the Study Area. The plan notes that neighbourhood centres, rural centres and local centres are determined by Local Governments.

Table 9: Activity Centre Classification (Draft STRLUS)

Characteristic	Description	Relevant to Study Area
Hobart CBD	The primary hub for Tasmania, the region and metropolitan Hobart, providing a comprehensive range of services and facilities in terms of business, government administration, leisure, entertainment, tourism facilities and services and public transport.	
Principal Centre	Principal centres offer a broad range of services and facilities including business and government offices, to serve the surrounding sub-region or region with a focus on retail and commercial sectors.	
District Centre	Primarily offers convenience goods, services, and some community facilities to the surrounding districts.	Sorell
Service Hub	Similar to District Centres but located outside of the Metropolitan Urban Boundary and generally service rural areas. They primarily offer convenience goods, services and some community facilities to the surrounding areas.	
Neighbourhood Centre	Cater to the immediate and surrounding suburb's daily needs and services.	
Rural Centre	Cater to their surrounding rural communities and may often be associated with a Tourist Destination towns or village function. Rural Centres may be of a similar scale to Neighbourhood Centres but will have a reduced public transport service.	
Local Centre	Provide access to some basic goods and services to support the community in its immediate area or a broader rural context.	
Specialist Centre	Focused on specific activities. Ideally situated along or adjacent to a public transport corridor and positioned between existing activity hubs.	

Source: STRLUS, Draft, 2025 (summarised)

Figure 17: Activity Centre Classification Map

Source: STRLUS, Draft, 2025

SERDA Strategic Plan 2025-2030

The SERDA Strategic Plan 2025–2030 establishes a collaborative, infrastructure-led approach to regional economic development, prioritising investment in transport, employment land, workforce development and tourism to support sustainable growth across South East Tasmania.

SERDA Infrastructure Strategy (2024)

The SERDA Economic Infrastructure Strategy identifies priority regional infrastructure, including:

- High priorities: airport, roads and bridges, land and housing, health, education and childcare,
- Medium priorities: recreation, irrigation, wastewater, water, energy.
- Low priorities: digital.

Notes in relation to the **Southern Beaches** include:

- Dodges Ferry school redevelopment ($25 Million) and Dodges Ferry Swimming Pool ($2.5 million) noted as infrastructure projects.
- Water and sewerage to southern beaches not planned for the foreseeable future.
- The Southern Beaches area is attractive to retirees and families taking advantage of the beach lifestyle.
- The Dodges Ferry Primary School has enrolled 80 new kinder students in each of the past three years, taking enrolments to well over 550 students.

Notes related to **Sorell** and relevant to this assessment include:

- Proposed investment in manufacturing and warehousing at 139 Main Road, Sorell ($20 million) and the Ningana Aged Care in Sorell ($20 million).
- Look to grow the provision of childcare in the high growth and younger populated areas of the SERDA region (including Sorell).
- Sorell is not currently well served with an industrial precinct to retain jobs in that region.

3.4. Local Policy and Strategy

Sorell Council Strategic Plan 2019-2029

Relevant objectives of the Sorell Strategic Plan include to:

- Facilitate regional growth; and
- Ensure a liveable and inclusive community.

Key measures of success relevant to facilitation of **regional growth** include:

- Provision of necessary infrastructure and management of assets.
- Increased business investment.
- Increased employment opportunities, with local jobs for local people.
- A contemporary planning model that facilitates diversified growth.
- The area is recognised a s a destination to visit.

Key measures of success relevant to ensuring a **liveable and inclusive community** include:

- Maintaining the 'community, coast and country' lifestyle.
- Sustained community health and wellbeing.
- Improved access to regional services.

Sorell Planning Scheme

The Tasmanian Planning Scheme – Sorell took effect on 21 December 2022. This planning scheme comprises the State Planning Provisions, which provide consistency on use and development standards across the state, and the Local Provisions Schedule (LPS), which provides the zoning, overlays and planning rules specific to the Sorell local government area (LGA).

The following zones are currently used in the Sorell LPS as relevant to the retail, commercial and industrial assessment:

- **Village** – the purpose of the Village Zone is to:
  - Provide for small rural centres with a mix of residential, community services and commercial activities.
  - Provide amenity for residents to the mixed use characteristics of the zone.
- **Local Business** – the purpose of the Local Business Zone is to:
  - Provide for business, retail, administrative professional, community and entertainment functions which meet the needs of a local area.
  - Ensure that the type and scale of use and development does not compromise or distort the activity centre hierarchy.
  - Encourage activity at pedestrian levels with active frontages and shop windows offering interest and engagement to shoppers.
  - Encourage residential and visitor accommodation use if it supports the viability of the activity centre and an active street frontage is maintained.
- **Light Industrial** - the purpose of the Light Industrial Zone is to:
  - Provide for manufacturing, processing, repair, storage and distribution of goods and materials where off-site impacts are minimal or can be managed to minimise conflict with, or unreasonable loss of amenity to, any other uses.
  - To provide for use or development that supports and does not adversely impact on industrial activity.

Sorell Land Supply Strategy (2019)

The Sorell Land Supply Strategy (prepared in 2017 and updated in 2019) assessed the supply, demand and projected future requirements for residential, commercial and industrial land across the municipality over a 20-year planning horizon.

The Strategy reinforces a clear settlement hierarchy within the Sorell LGA, identifying Sorell township as the primary location for residential population growth, commercial development and employment land.

In the Southern Beaches area, the Strategy recommended limited and discrete commercial zoning expansions. These included expansion of the Dodges Ferry Commercial Precinct westward to Old Forcett Road; identification of an indicative area for potential long-term zoning expansion within the Dodges Ferry shopping precinct; rezoning of land at Primrose Sands Road (since completed); and expansion of the Local Business Zone to the north-east in Lewisham.

Since publication of the Strategy, the rezoning of 579 Primrose Sands Road appears to be the only rezoning within the study area aligned with the recommendations.

3.5. Key Points

- The Southern Beaches functions as a satellite, residential and lifestyle-oriented area, with Dodges Ferry designated as a Town and other settlements operating as small Villages with local and visitor-serving roles.
- Retail and commercial activity is intended to be local-scale, focused on day-to-day convenience, services and tourism-related uses, with higher-order retail continuing to be concentrated in Sorell (District Centre) and Greater Hobart.
- State and regional policy discourages retail development that would compete with Sorell, reinforcing incremental growth within existing centres, particularly Dodges Ferry, rather than new or expanded retail precincts.
- The Statewide Industrial Land Strategy identifies industrial land shortages in Sorell LGA, but prioritises retention and efficient use of existing employment land (not expansion) in areas like Dodges Ferry, given infrastructure constraints.
- Industrial activity in Southern Beaches is expected to remain limited and local-serving, supporting small-scale trades, storage and service-industrial uses.
- Infrastructure limitations, particularly lack of planned sewerage servicing, are a constraint on development within Southern Beaches, reinforcing low-intensity, targeted retail and employment uses.

4. Business and Employment Land Supply Context

4.1. Introduction

The following outlines the existing business and employment land context within the Southern Beaches, providing an overview of land supply, business precincts, floorspace provision and recent development activity.

4.2. Land Supply Context

Business Precincts

Figure 18 shows land zoned for business across the Local Business; Village; and Light Industrial zones.

The supply context considers business precincts within the study area and also immediately adjacent to the study area (in the case of the Josephs Road light industrial site).

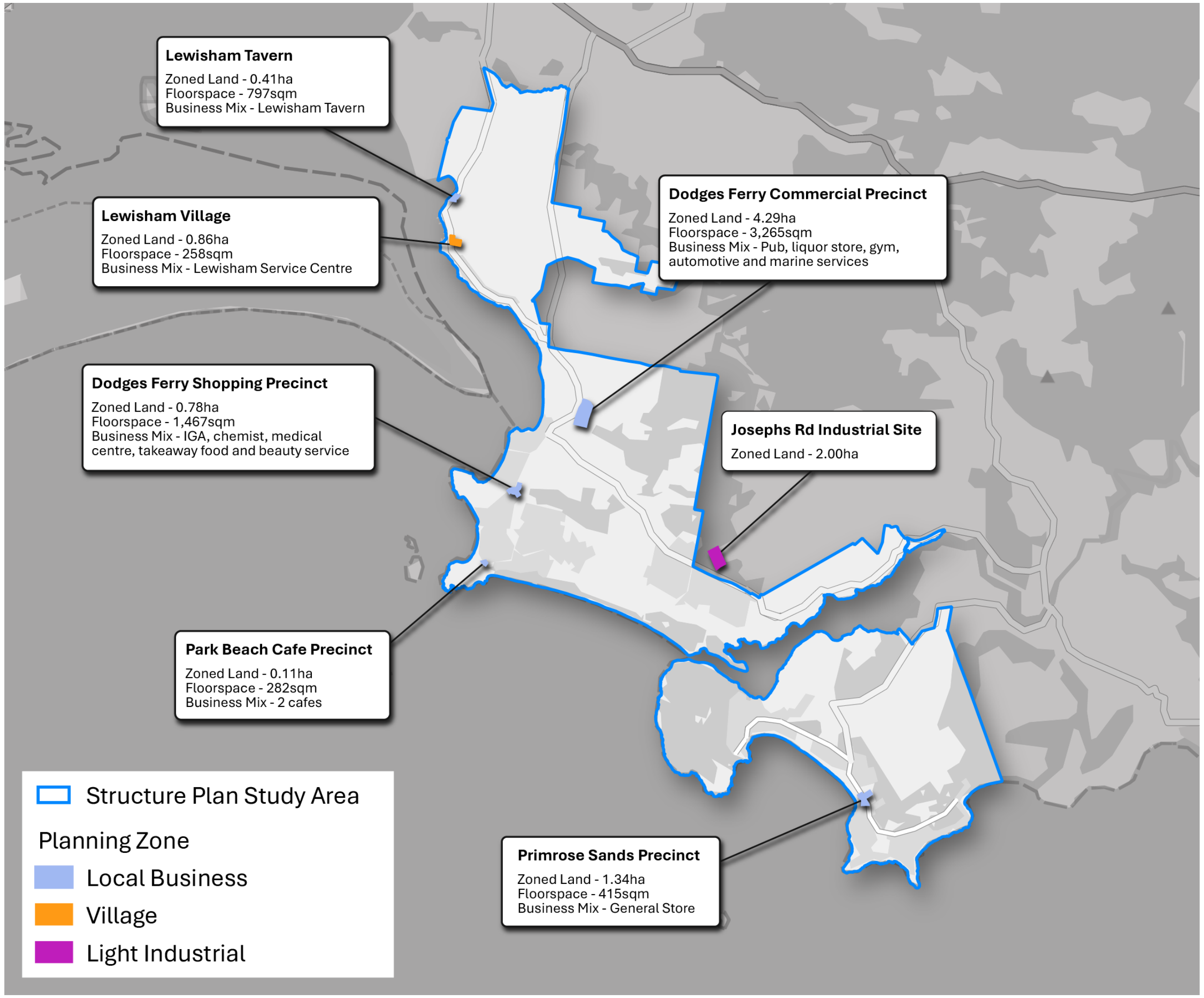
Th **Local Business Zone** is applied at five locations, including:

- **Lewisham Tavern;**
- **Dodges Ferry Commercial Precinct** (retail - pub, liquor store, commercial - gymnasium, and light industrial uses - automotive, boat servicing and storage).
- **Dodges Ferry Shopping Precinct** (IGA supermarket and specialty stores).
- **Park Beach Café Precinct** (two cafés).
- **Primrose Sands Precinct** (Primrose Sands General Store).

The **Village Zone** is applied at **Lewisham Village,** supporting the Lewisham Service Centre. Two residential properties are also located in this precinct.

The **Light Industrial Zone** is applied at a site on **Josephs Road**, located outside but adjacent to the study area, this site is occupied by a dwelling and open-air storage areas.

Figure 18: Zoned Land Supply Context Map



Source: Urban Enterprise, 2025

Land Supply

Across the study area there was a total of 9.8ha of zoned property identified for business use, including 6.94ha of land in the Local Business Zone, 2ha of land in the Light Industrial Zone and 0.86ha of land in the Village Zone (see Table 10).

Table 10: Zoned Land Supply

Zone	Zoned Property Land (ha)*
Local Business	6.94
Village	0.86
Light Industrial	2.00
Total	9.80

Source: Urban Enterprise, 2025

*Excludes roads and footpaths

Vacant Supply

Majority of land supply was identified as occupied (8.05 ha). There was 1.75ha of vacant land supply in the Local Business Zone, which included three sites in the Dodges Ferry Commercial Precinct and two sites in the Primrose Sands Commercial Precinct. The site on the north-east side of Primrose Sands Road was recently rezoned to Local Business through a planning scheme amendment. See Figures 19 and 20.

There is also a partially vacant zoned site for local business within the Dodges Ferry Shopping Precinct, however, this site appears to be an extension of a residential block and appears heavily vegetated and therefore has not been counted as vacant supply.

Table 11: Occupied and Vacant Land

Zone	Vacant (ha)	Occupied (ha)	Total (ha)
Local Business	1.75	5.19	6.94
Village	-	0.86	0.86
Light Industrial	-	2.00	2.00
Total	1.75	8.05	9.8

Source: Urban Enterprise, 2025

Zoned land supply for business is geographically dispersed across the study area, with a concentration of sites in Dodges Ferry. Business precincts are generally small-scale reflecting the localised role of employment land in the study area. Whilst overall availability of vacant business-zoned land is limited, a small number of key vacant sites present some opportunity for development and the creation of new business premises.

Figure 19: Vacant Sites Dodges Ferry Commercial Precinct

Source: Urban Enterprise, 2025 (aerial via Landchecker, 2025)

Figure 20: Vacant Sites Primrose Sands Commercial Precinct

Source: Urban Enterprise, 2025 (aerial via ListMap)

4.3. Business Mix

Summary

The Southern Beaches area has a limited and localised business base, reflecting its role as a predominantly residential and lifestyle-oriented coastal area, where most residents rely on larger centres such as Sorell or Hobart for higher-order retail and employment.

Retail and commercial activity is generally concentrated in Dodges Ferry, in the Dodges Ferry Shopping Precinct and the Dodges Ferry Commercial Precinct.

The Dodges Ferry Shopping Precinct comprises a small IGA supermarket (Hill Street Grocer), pharmacy, medical centre, takeaway food and beauty service.

The Dodges Ferry Commercial Precinct supports a Pub, convenience/drive through liquor store, gymnasium, automotive and marine servicing and storage businesses. A new swim centre is also under development adjacent to this precinct.

Beyond this, businesses are typically scattered and small-scale, including cafés, service centres, tavern and a general store/service centre at Primrose Sands Precinct.

The overall offer is geared toward local day-to-day convenience, local and visitor needs, rather than destination retail.

A landscape supplies business is also located in Lewisham, however, is not within a commercial zone. This business consists primarily of open yard storage areas for goods and materials.

Floorspace

Table 12 summarises floorspace across retail, commercial and industrial businesses.

Overall, there was a total of 6,276 sqm of floorspace identified in the study area with the majority within retail businesses.

Table 12: Retail, Commercial and Industrial Floorspace

	Floorspace Estimate (sqm)	%
Retail	3,898	62%
Commercial	831	13%
Industrial	1,547	25%
Total	**6,276**	**100%**

Source: Urban Enterprise, 2026

*note, a landscape supplies business is also located in Lewisham, however, is not within a commercial zone. The site is within the Low Density Residential Zone, and covers an area of 1.695ha. Building floorspace is estimated at ~300sqm. If included, this brings total industrial floorspace to 1,847 sqm.

4.4. Recent Development Activity

The following provides a summary of recent development and investment activity relevant to retail, commercial, industrial and visitor accommodation across the study area between 2019 and 2025, based on review of Council permit data.

Visitor Accommodation

Visitor accommodation is the predominant form of 'commercial in nature' type development that has been observed. The majority of applications relate to:

- Change of use from an existing dwellings to visitor accommodation;
- Visitor accommodation operating within part or all of a dwelling; or
- Secondary residences or ancillary structures repurposed for short-stay use.

The data indicates that visitor accommodation has become an established and ongoing land-use, rather than a temporary or emerging trend.

Most visitor accommodation approvals are located within established residential areas, particularly observed in Primrose Sands, Dodges Ferry and Lewisham. The main observation is the incremental conversion of residential housing stock to visitor accommodation, rather than the construction of purpose-built visitor accommodation buildings.

A small number of visitor accommodation developments are evident, particularly in the Carlton River area. These include multi-unit cabins, pods or villas on larger landholdings.

There has generally been a consistent and sustained level of visitor accommodation activity over the period, albeit, primarily relating to residential dwellings.

Commercial and Retail Uses

Commercial and retail development activity is limited in volume and generally small in scale, reflecting the limited supply of commercial and retail premises across the study area. Where present, activity has included:

- Café and food service fit-outs;
- Bottle shop and small retail tenancies;
- Minor alterations, signage, or upgrades to existing commercial premises;
- Fitness centres;
- Examples of home-based businesses (beauty services, yoga, gym, spa).

These uses are typically confined to existing commercial areas. Activity largely reflects adaptation and refurbishment of existing premises. There is little evidence of new commercial floor space creation over the period.

Commercial and retail approvals have generally occurred sporadically and show no discernible trends over the period.

Industrial Activity

There was very little evidence of industrial development activity observed in the data. Identified activity relevant to industrial included small-scale marine sales and servicing activities and similar niche operations.

This reflects limited industrial land supply and the areas specialised or location-specific role.

4.5. Development Proposals

Recent developments or development proposals relevant to retail, commercial and industrial land are summarised below.

Dodges Ferry Warehouse Units

Council has recently approved a six lot subdivision for warehousing/commercial storage in Dodges Ferry, adjacent to the existing Dodges Ferry Commercial Precinct.

It is proposed that five of the lots would be used for development, and lot six the balance of land.

The development is proposed to incorporate two commercial units of 189 sqm each at the corner of Old Forcett Road and proposed new access road, as well as eighteen (18) commercia/warehouse units of 330 sqm each. The development would result in a total net leasable area (NLA) of 6,318 sqm, significantly increasing commercial and industrial floorspace in the study area.

4.6. Stakeholder Observations

Urban Enterprise undertook targeted engagement with select local businesses. Key observations and themes are summarised below:

- Stakeholders reported limited availability of commercial premises, constraining new business establishment and expansion. Only a small number of vacant sites were noted.
- It was noted that a lack of available commercial premises has resulted in some home-based businesses, including professional services, health, personal care, and small-scale trades.
- Parking limitations were widely highlighted, particularly in precincts near cafes and popular beaches, where patrons often have to park on narrow streets. Poor pedestrian connectivity and traffic speed concerns, especially around families with children and prams, were also raised as barriers to business growth and public safety.
- Stakeholders identified gaps in medical services and health, childcare, hospitality, and co-working facilities. Businesses that align with the local lifestyle, such as fitness, wellbeing, and boutique tourism offerings, were seen as most likely to succeed.
- Limitations in digital connectivity, water and sewerage provision, public transport, and local footpaths were highlighted as constraints on growth and business viability. Addressing these gaps was noted as important to support local economic and community development.
- There was some noted tension between growth pressures and the need for development.

4.7. Key Points

- There is limited and dispersed business land supply for business across the study area, with land primarily in the Local Business Zone and concentrated in Dodges Ferry, with a small Light Industrial site at Josephs Road (outside but adjacent to the study area). The majority of land supply is already occupied, with around 0.9 ha of vacant land remaining in the Local Business Zone, across a small number of sites in Dodges Ferry and Primrose Sands, limiting realistic opportunities for new business establishment or expansion.
- Business activity is highly localised and small-scale, reflecting the area's role as a residential and lifestyle settlement rather than a major employment centre.
- Retail and commercial uses are focused in Dodges Ferry, including the shopping precinct (IGA and specialty stores) and the commercial precinct (pub, gym, marine/automotive servicing and storage), with scattered cafés and general stores elsewhere.
- Overall floorspace provision is modest (approx. 6,300 sqm), dominated by retail uses, with limited commercial floorspace and small-scale industrial/service-industrial activity.
- New commercial development has been minimal, with most activity involving refurbishment, fit-outs or minor changes to existing premises rather than creation of new floor space.
- There have been a number of permits related to conversion of dwellings to short-stay use in recent years, particularly in Primrose Sands, Dodges Ferry and Lewisham.
- Very limited industrial development activity has occurred, and industrial uses are niche and local-serving. However, a significant proposed development has been approved at Dodges Ferry (warehouse/commercial units), which will substantially increase supply of local service-industrial floorspace and reinforcing Dodges Ferry as the primary employment and business area of the study area.
- Stakeholders identified non-land constraints affecting business viability, including:
  - Limited availability of commercial premises;
  - Parking shortages near retail and beach precincts;
  - Poor pedestrian connectivity and safety;
  - Gaps in medical services, childcare, hospitality and co-working space;
  - Infrastructure limitations (digital connectivity, water/sewerage, transport).

5. Retail Assessment

5.1. Introduction

This section assesses potential retail floorspace demand generated by the size and forecast growth of the Study Area and its defined retail catchment. The assessment is intended to inform the appropriate scale, role and timing of retail land use and development within the Study Area.

The analysis has regard to:

- The activity centre hierarchy and context, including competing centres;
- The location, size and characteristics of the retail trade area;
- Existing retail provision and floorspace supply;
- Retail spending characteristics and expenditure patterns;
- Forecast population and household growth;
- Catchment expenditure growth; and
- Forecast demand for, and supportable levels of, retail floorspace.

5.2. Retail Floorspace

Retail floorspace within the study area is summarised at Table 13.

Retail floorspace within the Southern Beaches Study Area is modest in scale and strongly oriented toward local convenience and food-based uses. Total retail floorspace is estimated at approximately 3,898 sqm (covering approximately eleven retail businesses), reflecting the area's role as a local-serving centre rather than a destination retail location.

'Food catering' uses comprise the largest share of retail floorspace (54%), followed by 'food, liquor and grocery' retail (36%). Together, these categories account for around 90% of total retail floorspace, highlighting the dominance of everyday consumption, hospitality and visitor-serving activity within the Study Area in servicing residents and visitors.

'Retail services' (such as hairdressers and other personal services) and 'apparel, homewares and leisure' retail are limited, accounting for approximately 2% and 8% of floorspace respectively.

This floorspace profile is consistent with the Study Area's dispersed settlement pattern, limited supply of commercially zoned land and proximity to higher-order centres such as Sorell and Cambridge. Overall, the existing retail offer performs a local convenience role, with limited capacity to support higher-order retail, reinforcing that future retail growth is likely to remain incremental and focused on existing centres.

Table 13: Activity Centre Competition Context

	Floorspace (sqm)	% of Retail
Food Catering	2,114	54%
Food , Liquor, Groceries	1,406	36%
Retail Services	73	2%
Apparel, Homewares, Leisure	305	8%
Sub-Total Retail	3,898	100%

Source: Urban Enterprise, 2026

5.3. Activity Centre Context

Table 14 on the following page provides a summary of the activity centre context relevant to the study area and competition context.

The Southern Beaches Structure Plan area sits within the regional activity centre hierarchy defined by the draft *Southern Tasmania Regional Land Use Strategy (STRLUS)*, which provides important guidance on the appropriate role and scale of retail activity within the Study Area.

At a regional level, Sorell is designated as a District Centre, performing the dominant higher-order retail role for the sub-region. It accommodates major full-line supermarkets, a diverse range of specialty shops, hospitality, civic services, and some select large format retail. Sorell is expected to continue to capture much of the Study Area's higher-order retail expenditure.

Within the Study Area, Dodges Ferry is designated as a Town, while Carlton 'Beach', Lewisham and Primrose Sands are designated as Villages, performing satellite and/or tourist destination roles. The draft STRLUS does not assign formal Activity Centre classifications to these settlements, with local-scale centres determined at the municipal level.

This context positions retail activity in the Southern Beaches as local and neighbourhood-scale, focused on convenience retail, services and visitor-serving uses rather than higher-order or destination retail. Retail floorspace should therefore reinforce existing centres, particularly Dodges Ferry, while complementing, rather than competing with, the District Centre role of Sorell.

The activity centre hierarchy indicates that future retail demand in the Study Area will primarily be driven by population growth and visitation.

Table 14: Activity Centre Competition Context

Location / Centre	Centre Role (STRLUS / Hierarchy)	Retail Function	Key Retail Offer	Key Retail Anchors	Relationship to Study Area	Distance from Study Area
Hobart CBD	Capital City Centre	Higher-order retail, specialist retail, employment and civic functions.	Major department stores, specialty retail, hospitality, entertainment and services.	Major national retailers.	Not a day-to-day competitor; captures discretionary, specialist and destination retail expenditure.	37km
Cambridge Park (Hobart Airport)	Specialist Centre	Large-format and bulky-goods retail.	Homemaker, bulky goods, trade and large-format retail.	Harvey Norman, Anaconda, Nick Scali, Harris Scarfe, National Tiles, BCF. (~35,000 sqm floorspace)	Key destination for large-format and bulky-goods.	22km
Sorell	District Centre	Weekly shopping and convenience retail, supported by civic and service uses.	Major supermarkets, specialty retail, services and limited trade-related retail.	Two full line supermarkets - Coles (~3,500 sqm) and Woolworths (~3,500 sqm). Mitre 10, Chemist Warehouse.	Primary competing centre for higher-order and weekly retail expenditure.	12km
Dodges Ferry	Town (no formal Activity Centre classification)	Local convenience retail and services.	Convenience supermarket, pharmacy, takeaway, personal services, local retail.	IGA Supermarket (~500 sqm)	Main local centre serving day-to-day needs of residents.	-
Carlton Beach / Lewisham / Primrose Sands	Villages	Local convenience and visitor-serving retail.	Cafés, general stores, small service uses, tourism-related retail.	-	Complementary role and small-scale retail demand.	-
Other Southern Coastal Settlements (e.g. Dunalley, Boomer Bay)*	Villages	Limited convenience and visitor-serving retail	Small general stores and hospitality-based offers.	-	Minimal influence on Study Area retail.	-
Other (e.g. Midway Point)	-	Limited convenience goods	Convenience and limited hospitality offer.	-	Minimal influence on Study Area retail.	17km

*Beyond this geography area, areas further south such as Nubeena are serviced by two small-scale IGA general stores, while Port Arthur contains a small IGA general store. These areas would have minimal influence on study area retail.

5.4. Existing Spending Analysis

Figure 21 illustrates the total expenditure captured by businesses in the Southern Beaches in the 2024 and 2025 calendar years.

Spend in Southern Beaches

Overall, total spend increased modestly between 2024 and 2025, despite a decline in expenditure associated with 'light industry, trades and transport.'

In 2025, total expenditure captured within the Southern Beaches was approximately $34 million. The largest spending category was 'groceries, food and alcohol retailing', accounting for 35% of total expenditure. This was followed by 'light industry, trades and transport' (likely primarily fuel-related expenditure) at 29%, and 'dining, entertainment and travel' at 20%.

Together, these categories accounted for more than 80% of total spend, highlighting the dominance of everyday convenience retail needs, transport-related expenditure and hospitality activity in the local area.

Of the total spend captured within the Southern Beaches, approximately 73% originated from residents of the Sorell LGA, with the balance (27%) attributable to visitors from outside the LGA.

Southern Beaches residents accounted for around 31% of total local spend, while residents from elsewhere in the LGA contributed a further 42%, indicating that the area captures a share of spending from the broader Sorell catchment.

Across the major expenditure categories, residents in the LGA generated the majority of spending, accounting for approximately 78% of 'groceries, food and alcohol retailing' spend and 77% of 'light industry, trades and transport' spend. In contrast, 'dining, entertainment and travel' expenditure was more evenly distributed between residents and visitors, with visitors accounting for approximately 46% of total spend.

Visitor activity provides an important supplementary source of expenditure that supports the viability of local retail and commercial uses, particularly food and beverage and selected service-based activities. Visitor demand is expected to complement resident demand.

Escape Spend

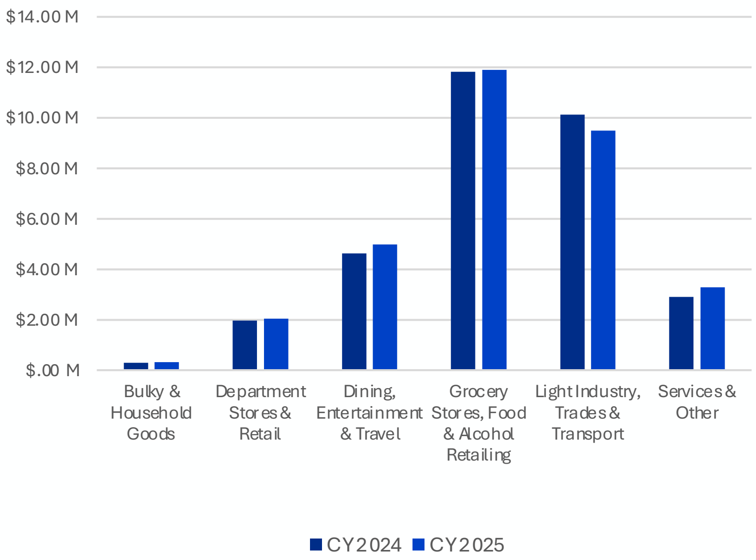
Southern Beaches residents spent approximately $58 million elsewhere within the LGA, with nearly half directed to groceries, food and alcohol retailing. Much of this expenditure is captured in Sorell, reflecting its role as the District Centre and its provision of full-line supermarkets (Coles and Woolworths), supported by a broader retail offer.

This spending pattern is consistent with the established activity centre hierarchy and existing retail provision. While there is likely some unmet demand for additional retail in the Southern Beaches, any expansion must be carefully balanced to avoid undermining Sorell's role as the principal higher-order retail destination.

A further $94 million is spent outside the LGA. The largest categories of external expenditure include department stores and retail ($24 million), dining, entertainment and travel ($18 million), and light industry, trades and transport ($16 million).

This pattern reflects the limited availability of these higher-order goods and services within the Sorell LGA, resulting in residents travelling to Greater Hobart to meet these needs.

Figure 21: Total Local Spend by Expenditure Category, Southern Beaches, 2024 and 2025 Calendar Years



Source: Spendmapp, 2024, 2025 Calendar Year, Compiled by Urban Enterprise.

Table 15: Spend in Southern Beaches by Expenditure Category, Southern Beaches, 2025 Calendar Year ($ Millions).

Southern Beaches	Spend in Southern Beaches		Share of Spend in Southern Beaches					Escape Spend	
Expenditure Category	Total Spend in Study Area	Proportion of spend in Study Area	*Southern Beaches Resident Spend*	*Rest of LGA Resident Spend*	Total LGA Resident Spend	Visitors outside of LGA Spend	Total	To Rest of LGA	To Outside of LGA
Bulky & Household Goods	$0.21	1%	*5%*	*86%*	90%	10%	100%	$2.42	$8.67
Department Stores & Retail	$2.04	6%	*32%*	*41%*	73%	27%	100%	$5.65	$23.85
Dining, Entertainment & Travel	$6.81	20%	*25%*	*29%*	54%	46%	100%	$7.17	$17.76
Grocery Stores, Food & Alcohol Retailing	$11.92	35%	*38%*	*40%*	78%	22%	100%	$28.06	$11.96
Light Industry, Trades & Transport	$9.75	29%	*31%*	*46%*	77%	23%	100%	$7.50	$16.05
Services & Other	$3.26	10%	*17%*	*61%*	78%	22%	100%	$7.14	$15.75
Total	**$33.99**	**100%**	***31%***	***42%***	**73%**	**27%**	**100%**	**$57.94**	**$94.04**

Source: Spendmapp data for 2025 calendar year, provided by Sorell Council. Data summarised by Urban Enterprise.

- Notes: Local and Escape Spend category names adjusted by UE for ease of understanding. Percentages may not sum to 100% due to rounding of Spendmapp data.

5.5. Retail Trade Area

Trade Area Definition

A retail catchment or trade area is established to identify where retail expenditure (turnover) will be generated and captured for a given activity centre.

Establishing a retail catchment has regard to the following:

- **Activity centre hierarchy** – The activity centre hierarchy, which positions the Southern Beaches as a local serving area, with higher order centres located in Sorell (District Centre) and Greater Hobart, which function as the dominant retail destinations for the region.
- **Retail offering** – The scale and mix of the current retail offering (i.e. type and range of goods/services available);
- **Location** – Proximity and access to consumers, including residents, workers and visitors;
- **Accessibility** – Access and exposure of the centre to consumers (i.e. road, rail, active transport); and
- **Competition** – The type, scale and diversity of competing retail offering of other activity centres within and proximate to the catchment (see Table 14).

The retail trade area for the Southern Beaches Study Area has been defined having regard to the above considerations and is shown at Figure 22.

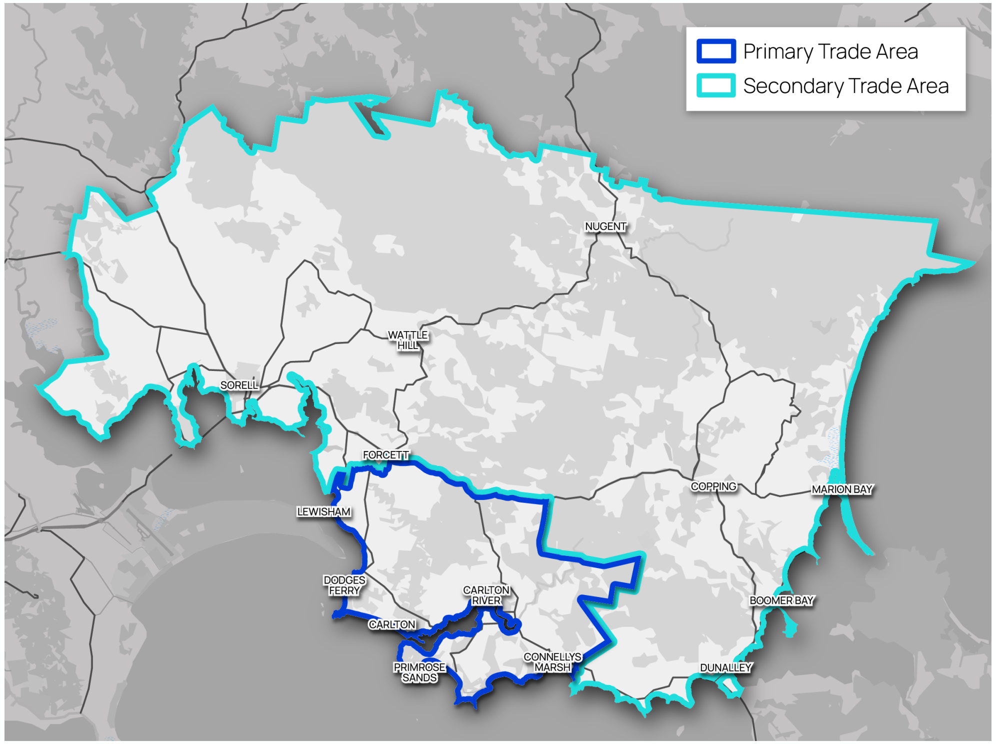
Primary Trade Area

The Primary Trade Area comprises the study area and core Southern Beaches suburbs of Dodges Ferry, Carlton, Carlton River, Lewisham and Primrose Sands, along with their immediate surrounds including Connellys Marsh. This area represents the principal catchment supporting retail activity within the Study Area, particularly for day-to-day convenience retail, food and beverage, and local services.

This area represents the principal catchment supporting retail activity within the Study Area, particularly for day-to-day convenience retail, food and beverage, and local services.

Given the role of Southern Beaches within the retail hierarchy, the Primary Trade Area reflects the main convenience catchment, with residents continuing to rely on Sorell for higher-order retail trips.

Figure 22: Retail Trade Area, Southern Beaches Study Area



Source: Urban Enterprise, 2026

Secondary Trade Area

The Secondary Trade Area includes the balance of the Sorell LGA beyond the Primary Trade Area. Residents from this area contribute to spending within the Southern Beaches, particularly associated with visitation, dining and lifestyle-based activity, however, it is not a primary source of regular convenience retail demand.

Sorell township functions as the District Centre for the LGA, capturing most weekly and higher-order retail expenditure generated by households across the municipality. As such, the Secondary Trade Area provides a supplementary source of expenditure, supporting visitor-serving and hospitality uses rather than materially expanding the supportable retail market within the Study Area.

Catchment Population and Household Growth

Population and Household Estimates and Historical Growth

In 2021, the primary retail catchment had an estimated population of approximately 7,158 residents, while the secondary catchment was home to approximately 9,576 residents.

Both catchments experienced strong population growth between the 2016 and 2021 Census periods. The primary catchment increased by 912 residents, equating to an average annual growth rate of 2.8% per annum (approximately 182 residents per year). Over the same period, the secondary catchment increased by 1,408 residents, at a slightly higher growth rate of 3.2% per annum (approximately 282 residents per year).

In 2021, there were approximately 3,039 households in the primary catchment and 3,861 households in the secondary catchment. Household growth was similarly strong, with primary and secondary catchment households increasing at average annual rates of 3.4% and 3.3%, respectively.

Table 16: Population (UR) Primary and Secondary Trade Areas, 2016 - 2021

			Change 2016-21		
Population	2016	2021	**Total**	AAG	**AAGR**
Primary TA	6,246	7,158	912	182	2.8%
Secondary TA	8,168	9,576	1,408	282	3.2%
Sub-Total	14,414	16,734	2,320	464	3.0%
Households					
Primary TA	2,573	3,039	466	93	3.4%
Secondary TA	3,276	3,861	585	117	3.3%
Sub-Total	5,849	6,900	1,051	210	3.4%

Source: ABS Census, 2016 – 2021.

Note: *Primary trade area population estimates are based on a compilation of relevant statistical area data. A small proportion of the primary trade area population that falls outside official statistical boundaries has been estimated by applying an occupancy rate and average household size to a dwelling count derived from aerial imagery.

Available Population Forecasts

Population forecasts prepared by Remplan and the Tasmanian Department of Treasury and Finance have been reviewed to provide context for future growth at both the Southern Beaches and Sorell LGA levels. Population forecasts and growth rates are summarised below and in Table 17.

Remplan Forecasts (2023):

In 2023, Remplan prepared population forecasts for the Sorell LGA and the Southern Beaches region, including the localities of Lewisham, Dodges Ferry, Carlton and Primrose Sands. Between 2021 and 2046, Remplan forecasts that the Southern Beaches population will grow at an average rate of 0.6% per annum, equating to an increase of approximately 960 residents over the period (around 38 residents per year).

Over the same period, Remplan forecasted that the Sorell LGA population will grow at an average rate of 0.8% per annum, reaching close to 21,000 residents by 2046, an increase of approximately 3,984 residents (around 159 residents per year).

Tasmanian Department of Treasury and Finance (2024):

In 2024, the Tasmanian Government released LGA-level population projections under low, medium and high growth scenarios. Table 1 7 shows these projections to 2046. Under these scenarios, the Sorell LGA population is projected to grow at average annual rates of:

- 0.8% per annum (approximately +140 residents per year) under the low growth scenario;
- 1.3% per annum (approximately +247 residents per year) under the medium growth scenario; and
- 1.6% per annum (approximately +327 residents per year) under the high growth scenario.

Note that these forecasts should be reviewed if additional land for housing is facilitated through the Structure Plan, given the implications for retail and commercial demand.

Table 17: Existing Population Forecasts, 2016 - 2021

	2021	**2026**	**2031**	**2036**	**2041**	**2046**	**AAG # (2021-2046)**	**AAG (2021-2046)**
Remplan Forecasts								
Southern Beaches	6,023	6,381	6,569	6,729	6,863	6,983	38	0.6%
Sorell LGA	16,975	18,403	19,194	19,893	20,485	20,959	159	0.8%
Treasury Forecasts								
Sorell LGA (Low)	16,963	18,267	19,102	19,728	20,172	20,460	140	0.8%
Sorell LGA (Medium)	16,963	18,390	19,753	21,001	22,128	23,146	247	1.3%
Sorell LGA (High)	16,963	18,602	20,334	22,011	23,614	25,148	327	1.6%

Source: ABS Census, Remplan, 2023; Department of Treasury and Finance, 2024.

Trade Area Forecast Population Growth

The following estimates forecast growth of the trade area, having regard to the defined trade area population and the available population forecasts summarised in Table 17 on the previous page.

For the purpose of population projections, 2026 has been adopted as the baseline year.

A 2026 population estimate for the trade area was derived by using Australian Bureau of Statistics (ABS) Estimated Resident Population (ERP) data for 2024 and projecting this forward to 2026. This estimate was closely aligned with the Remplan forecast population for 2026. The Remplan estimate has therefore been adopted as the baseline 2026 population, totalling 18,403 residents, comprising 7,522 residents in the primary trade area and 10,881 residents in the secondary trade area.

Three population growth scenarios have been adopted for the trade area:

- **Scenario 1** applies Remplan population forecasts to the Southern Beaches within the primary trade area. No additional long term growth has been assumed for the smaller settlements within the balance of the primary trade area, reflecting their limited development capacity and constrained growth role. Under this scenario there is estimated to be an additional 664 residents in the primary trade area and 1,894 in the secondary trade area.
- **Scenario 2** applies Remplan population growth rates to the primary trade area and adopts the **medium growth scenario** from the Tasmanian Department of Treasury and Finance population projections for the balance of the LGA (secondary trade area). Under this scenario, the secondary trade area population growth increases to +4,583 residents.
- **Scenario 3** applies Remplan population growth rates to the primary trade area and adopts the **high growth scenario** from the Tasmanian Department of Treasury and Finance population projections for the balance of the LGA (secondary trade area). Under this scenario, the secondary trade area population growth increases to +6,828 residents.

Trade area population forecasts are shown at Table 18.

Table 18: Trade Area Population Forecasts

	2026	2031	2036	2041	2046	Change 2026-2046 (#)
Scenario 1						
Primary Trade Area	7,522	7,683	7,847	8,014	8,186	+664
Secondary Trade Area	10,881	11,326	11,790	12,272	12,775	+1,894
Total Trade Area	18,403	19,009	19,637	20,287	20,960	+2,557
Scenario 2						
Primary Trade Area	7,522	7,683	7,847	8,014	8,186	+664
Secondary Trade Area	10,881	11,880	12,972	14,163	15,464	+4,583
Total Trade Area*	18,403	19,563	20,819	22,178	23,650	+5,247
Scenario 3						
Primary Trade Area	7,522	7,683	7,847	8,014	8,186	+664
Secondary Trade Area	10,881	12,173	13,619	15,236	17,045	+6,164
Total Trade Area*	18,403	19,856	21,465	23,250	25,231	+6,828

*Note forecasts at 2046 under scenarios 2 and 3 differ from the Treasury projections due to a change in the baseline year population estimate (2026).

Per Capita Expenditure

Estimated per capita retail expenditure within the trade area is summarised in Table 19. Estimates are informed by Spendmapp data, escalated MarketInfo data and recent retail research, and reflect the trade area's household and demographic characteristics.

Average annual retail expenditure across the trade area is estimated at **approximately $18,900 per person in 2026**.

'Food, liquor and groceries' spend accounts for close to 50% of per capita spend, and is typically associated with supermarket and produce retail.

Table 19: Retail Expenditure per Capita, 2026

Retail Category	Per Capita Expenditure
Food, Liquor and Groceries	$9,100
Food Catering	$2,500
Apparel, Homewares and Leisure	$4,500
Bulky Goods	$2,100
Retail Services	$700
Total	$18,900

Source: Urban Enterprise, 2026, based on Spendmapp / MarketInfo (indexed)

Expenditure Pool and Market Share

The total retail expenditure pool generated by residents is calculated by applying per capita spend to the current resident population.

As of 2026, the primary trade area is estimated to generate a retail expenditure pool of around $142.2 million, while the secondary trade area generates a retail expenditure pool in the order of $205.7 million as of 2026.

In total, residents of the trade area are estimated to generate an expenditure pool in the order of $347.8 million as of 2026.

A substantial share of this expenditure is expected to be captured by higher-order centres outside the Study Area, given the localised, convenience nature of retail in the study area. This has informed market share assumptions and estimated turnover captured by Southern Beaches.

The expenditure pool and turnover estimates under each scenario are included at Appendix A.

Table 20: Existing Retail Expenditure Pool and Market Share and Turnover, 2026

	2026
Trade Area Expenditure Pool	
Primary	$142.2M
Secondary	$205.7M
Total	$347.8M
Southern Beaches Market Share	
Primary	9%
Secondary	3%
Passing Trade	20%
Estimated Turnover Captured by Southern Beaches	
Resident	$19.1M
Passing Trade	$4.7M
Total Estimated	$23.7M

Source: Urban Enterprise, 2026

5.6. Supportable Retail Floorspace

The following estimates the quantum of retail floorspace that could viably be supported in the study area over time.

Supportable retail floorspace has been estimated by modelling population and expenditure growth, market share and average turnover densities for retailers in the Southern Beaches.

Considerations and Assumptions

Key considerations and assumptions that have underpinned the model include:

- The Study Area is expected to continue to perform a local-serving, convenience-focused retail role within the established activity centre hierarchy, oriented to day-to-day needs, food and beverage, services and visitor-serving uses.
- Higher-order retail demand is assumed to continue to be met primarily by Sorell (District Centre) and Greater Hobart, consistent with and reinforcing the activity centre hierarchy.
- The existing retail supply context is characterised by small scale centres, limited vacant floorspace and constrained redevelopment opportunities, which reinforce the role of existing centres and limits capacity for hierarchy-altering development.
- Land availability, servicing and infrastructure constraints are expected to constrain development opportunities, supporting a continuation of its localised role within the hierarchy and reinforcing incremental growth.
- Existing retail floorspace is dispersed across settlements and individual businesses, limiting the consolidation of higher-order retail functions and reinforcing a centre-based, localised hierarchy structure.
- Retail market share is assumed to remain broadly constant over time. The modelling broadly assumes that existing patterns of resident, visitor and escape expenditure are maintained over time, with only a modest uplift in local expenditure capture.
- The visitor role of the area contributes to retail turnover generated from outside to the trade area, particularly in food and beverage.
- Turnover densities reflect the retail business typologies and existing floorspace provision.
- Supportable retail floorspace is assessed in aggregate only, with delivery expected to occur gradually over time rather than on a continuous basis.

Results

The results of the supportable retail floorspace modelling are shown in Table 21.

Population scenarios 1 and 2 are considered appropriate for the purposes of the structure plan, which reflect more conservative population outcomes and aligning with the Study Area's established local-serving role and the regional activity centre hierarchy.

Under these scenarios, the study area could viably support approximately 5,000–5,500 sqm of retail floorspace by 2046. Accordingly, the Structure Plan should plan for a net additional requirement of around 1,100–1,600 sqm of retail floorspace over the planning period (adopting the higher end of the range for planning purposes).

This level of growth supports modest, incremental expansion of retail floorspace over time and can be accommodated without undermining the established higher-order retail roles of Sorell or Greater Hobart, consistent with the regional activity centre hierarchy.

Future retail growth is expected to be market-led but appropriate retail uses would align with the convenience, hospitality, lifestyle and tourism role currently performed by the Study Area, particularly food, groceries, hospitality, and limited growth in retail services and small-scale discretionary retail (including apparel, homewares and leisure).

There is evidence of latent demand for retail floorspace, particularly in the food and grocery sector, suggesting that near-term expansion opportunities may exist ahead of longer-term population growth.

Table 21: Supportable Retail Floorspace Projections

	Current Floorspace	2026	2036	2046	Change current-2046
Scenario 1					
Food, Liquor and Groceries	1,406	1,790	1,891	1,998	+592
Food Catering	2,114	2,218	2,363	2,518	+403
Non-Food Retail	378	489	513	538	+160
Total	3,898	4,497	4,767	5,054	+1,156
Scenario 2					
Food, Liquor and Groceries	1,406	1,790	1,954	2,142	+736
Food Catering	2,114	2,218	2,494	2,817	+703
Non-Food Retail	378	489	521	556	+178
Total	3,898	4,497	4,969	5,516	+1,618
Scenario 3					
Food, Liquor and Groceries	1,406	1,790	1,989	2,227	+821
Food Catering	2,114	2,218	2,566	2,993	+879
Non-Food Retail	378	489	525	567	+189
Total	3,898	4,497	5,081	5,787	+1,889

Source: Urban Enterprise, 2026

5.7. Key Points

- Southern Beaches plays a local and neighbourhood-scale retail role, focused on convenience retail, food and beverage, services and visitor-serving uses, with no role envisaged for higher-order or destination retail, consistent with the established activity centre hierarchy.
- Sorell functions as the District Centre and will continue to capture the majority of weekly and higher-order retail expenditure generated by Southern Beaches residents, reflecting and reinforcing the regional activity centre hierarchy.
- Existing retail floorspace is modest (~3,900 sqm) and dominated by food catering and food, liquor and grocery retail, together accounting for around 90% of total retail floorspace, aligned with a local-serving retail function rather than higher-order provision.
- Retail spending within the study area is driven by everyday consumption and lifestyle activity, with groceries, fuel/trades and dining comprising the majority of expenditure; visitor expenditure plays a significant role, particularly in hospitality.
- While there is a high level of escape expenditure to Sorell and Greater Hobart, this is consistent with the retail hierarchy, reflecting the limited role of Southern Beaches in accommodating higher-order retail and the reliance on District and higher-order centres for these needs.
- Whilst recent historical population growth has been strong, forecast catchment population growth is expected to moderate based on existing forecasts, particularly within the primary trade area.
- Retail demand modelling indicates incremental growth for retail floorspace, with supportable retail floorspace increasing to approximately 5,000–5,500 sqm by 2046, equating to an additional 1,100–1,600 sqm over the planning horizon under realistic scenarios. It would be prudent to adopt the higher end of the range for planning purposes, and should be planned to reinforce, rather than undermine, the retail hierarchy.

5.8. Implications for the Structure Plan

- Reinforce Dodges Ferry as the primary local retail centre, accommodating the majority of future retail growth and serving as the anchor for convenience and supermarket provision. Support, where required, the expansion of the Dodges Ferry Hill Street Grocer as the area's anchor convenience supermarket.
- Prioritise infill, expansion and redevelopment within existing retail precincts, recognising land supply, servicing and infrastructure constraints.
- Plan for modest, incremental retail expansion, focused on food, groceries, hospitality, local retail services and visitor-serving/lifestyle retail uses (speciality food stores, boutique retailers), rather than large new retail developments.
- Avoid new standalone or out-of-centre retail locations, consistent with policy objectives to protect Sorell's District Centre role and maintain the activity centre hierarchy.
- Improve the economic functioning of local retail and business precincts through targeted upgrades to access, car parking, pedestrian safety, presentation and landscaping. Key precincts include the Dodges Ferry Shopping precinct, Dodges Ferry Commercial Precinct, and Park Beach Café Precinct.
- Actively plan key business precincts, including the Dodges Ferry Shopping Precinct and the Dodges Ferry Commercial Precinct, considering both daytime and night-time trading opportunities.
- The mixed-use nature of the Dodges Ferry Commercial Precinct will need to be carefully managed, given it supports a diversity of business types (retail, commercial, industrial, recreation) and activity is expected to increase over time.
- Maintain the long-term opportunity to expand the Dodges Ferry Commercial Precinct to support local business activity.
- Recognise visitor demand as a key contributor to retail viability, particularly for food and beverage uses, and consider opportunities to facilitate tourism-related uses through existing available business land. Recognise that certain forms of retail and commercial development, including hospitality, tourism-related and lifestyle-oriented uses, may increase local expenditure capture without directly competing with higher-order centres. These uses can attract visitor spending and support economic activity in a manner consistent with the Study Area's local-serving and visitor-focused role.
- Infrastructure capacity, particularly the availability of reticulated sewerage and supporting servicing infrastructure, represents a defining constraint on future development (retail, commercial and industrial) within the Southern Beaches. While the assessment can provide an indication of potential future needs for floorspace, infrastructure capacity will be a key determinant of what development outcomes are realistically achievable within the planning horizon.

6. Commercial and Industrial Land Needs

6.1. Introduction

This chapter considers the need for commercial and industrial land to inform the Structure Plan, having regard to local demand, supply and the role of the Southern Beaches as a local-serving settlement.

6.2. Commercial

The following provides an estimate of demand for commercial floorspace having regard to the function of the Study Area and the outcomes of the retail demand assessment.

Influences and Indicators

Key influences and indicators of commercial floorspace needs are summarised below:

- **Study area role and function -** Consistent with its retail role, the Study Area's commercial function is expected to be local-serving, focused on population-based services and selected visitor-related uses. The area is not expected to support higher-order commercial or office activities, with such functions continuing to be accommodated in Sorell and Greater Hobart, limiting demand to small-scale, locally oriented commercial uses.
- **Population growth** - Population growth trajectory is expected to support incremental demand for commercial floorspace, primarily associated with local population-serving uses such as medical and allied health services, and personal services, and community-based commercial activities, rather than more intensive commercial activity.
- **Existing supply** - There is currently a very limited supply of commercial floorspace within the Study Area. This provision is currently comprised of a gymnasium/fitness centre and a medical centre, with the gymnasium accounting for the majority of floorspace (approximately 90%). Consultation with stakeholders indicates there is little to no vacant or available commercial floorspace for new business establishment or expansion. This suggests that while overall demand is modest, there may be latent or unmet demand for small-scale commercial premises due to limited availability rather than lack of market support.
- **Relationship to retail demand** - Commercial floorspace demand within the Study Area is linked to retail centre performance. Retail centres provide the primary locations where commercial service uses typically cluster and operate most effectively. Ancillary commercial uses, such as medical centres, allied health, personal services and small commercial tenancies, are typically located within or adjacent to these retail centres and tend to scale proportionally with retail viability and overall centre activity.
- **Employment profile** - As at 2021, the Study Area supported a small local employment base (approximately 688 jobs), reinforcing its role as a predominantly residential and lifestyle-oriented area rather than a major employment destination. Local employment is concentrated in construction, accommodation and food services, and service-based industries, indicating demand for small, localised, service-oriented commercial uses rather than larger office-based or employment-focused commercial floorspace.
- **Resident workforce** - The Study Area has a large resident workforce but limited local employment, with most residents commuting elsewhere for work. This reinforces its non-employment centre role and supports demand for small, service-based commercial uses, rather than larger office or employment-focused floorspace.
- **Visitor / tourism influences** - The Study Area is a well-established coastal and lifestyle destination, attracting day-trip and longer-stay visitors, particularly from Greater Hobart. Recent planning approvals indicate a continued trend of existing dwellings being converted to visitor accommodation, suggesting support for an emerging overnight visitor market. There are also examples of small-scale serviced accommodation on rural and peripheral properties outside the core settlement area. While visitor activity supports selected commercial uses, such as for health, personal services, hospitality-related and visitor-serving services, it does not generate demand for higher-order or employment-intensive commercial floorspace.
- **Known proposals -** A known proposal has been approved for development at Old Forcett Road, adjacent to the existing Dodges Ferry Commercial Precinct. The development would deliver a total of approximately 6,318 sqm of commercial and warehouse floorspace, representing a notable increase in locally-available commercial premises. The scale and format of the proposal is broadly consistent with the Study Area's role in accommodating small-scale, service-oriented and trade-related commercial uses, rather than higher-order commercial or office activity.

Forecast Commercial Needs

Forecast commercial floorspace demand has been assessed using two complementary demand calculation methods, reflecting the Study Area's local-serving role and the close relationship between commercial and retail activity.

Method 1: Commercial Floorspace as a % of Projected Retail Demand

Commercial floorspace demand has been assessed relative to the level of supportable retail floorspace, recognising that commercial service uses typically cluster within or adjacent to retail centres and scale with overall centre activity.

This method has adopted two provision ratios, including 20% (equating to the current proportion of commercial floorspace to retail floorspace across the study area), and a higher provision rate of 30% (which equates to the proportion of commercial floorspace to retail floorspace provision when factoring in planned supply within known proposals, and recognises latent demand).

Under this approach, commercial floorspace demand would sit between approximately 1,000-1,600 sqm by 2046 under scenarios 1 and 2, with demand likely to be at the upper end of the range, which would equate to around +825 sqm of commercial floorspace over the planning period.

Method 2: Population-Based Commercial Floorspace Demand

Commercial floorspace provision within the Southern Beaches is low, at approximately 0.11 sqm per resident, reflecting the area's role as a predominantly residential and lifestyle-oriented coastal settlement, with limited local commercial employment, strong outward commuting, and reliance on Sorell and Greater Hobart for higher-order services and jobs.

Notwithstanding this context, stakeholders identified a lack of available premises for new business establishment or expansion, suggesting that existing commercial floorspace may be constrained by supply rather than underlying demand.

For the purposes of this analysis, two indicative commercial floorspace provision rates have therefore been tested: 0.16 sqm per resident (reflecting current and proposed commercial floorspace provision) and a higher provision rate of 0.25 sqm per resident.

Under this approach, total commercial floorspace demand is projected to be in the order of approximately 1,300-2,000 sqm by 2046, equating to an additional 490–1,200 sqm of non-retail commercial floorspace over the planning period.

Considering the influences, indicators and potential for latent demand, it would be prudent to plan for additional commercial (non-retail) floorspace in the order of 800-1,000 sqm over the planning period (adopting the higher end of the range for planning purposes).

Table 22: Projected Commercial Floorspace Needs (Method 1)

	Current	2026	2036	2046	Change
Scenario 1					
Commercial Floorspace as % of Retail (20%)	831 sqm	899	953	1,011	+180
Commercial Floorspace as % of Retail (30%)		1,349	1,430	1,516	+685
Scenario 2					
Commercial Floorspace as % of Retail (20%)	831 sqm	899	994	1,103	+272
Commercial Floorspace as % of Retail (30%)		1,349	1,491	1,655	+824

Source: Urban Enterprise, 2026

6.3. Implications for the Structure Plan

- Plan for small-scale, locally oriented commercial uses that primarily provide population-serving and service-based functions. Key commercial opportunities may include health and wellbeing uses (such as allied health, Pilates, yoga, fitness and massage), co-working spaces, shared business space, or local business hubs for sole traders and home-based businesses.
- Focus commercial activity within or adjacent to existing retail centres, particularly Dodges Ferry, to reinforce clustering and centre vibrancy.
- Avoid planning for higher-order office or employment-focused commercial development, which would be inconsistent with the study area's established role and function.
- In addition to the projections, consider complementary commercial activity associated with tourism, including commercial visitor accommodation. Where appropriate, explore opportunities for shop-top development within the Dodges Ferry Shopping Precinct and the Primrose Sands Precinct.
- Ensure sufficient flexibility within existing commercial and mixed-use precincts to accommodate modest future growth and incremental business expansion over time.
- Recognise the approved Old Forcett Road development as likely to meet a portion of latent and near-term demand, with future commercial growth expected to be incremental.
- Recognise that infrastructure capacity may constrain future commercial development.

Table 23: Projected Commercial Floorspace Needs (Method 2)

	Current	2026	2031	2036	2041	2046	Change
Commercial Floorspace Provision per Person (0.16 sqm)	831 sqm	1,209	1,235	1,261	1,288	1,316	+485
Commercial Floorspace Provision per Person (0.25 sqm)		1,881	1,921	1,962	2,004	2,046	+1,215

Source: Urban Enterprise, 2026

6.4. Industrial

The following provides a discussion of industrial land needs, having regard to the role and function of the Study Area, and influences and indicators of demand.

Influences and Indicators

Key influences and indicators of industrial land needs are summarised below:

- **Study area role and function -** Consistent with its predominantly residential and local-serving retail role, the Study Area's industrial role is limited. Existing industrial-related activity is largely confined to the Dodges Ferry Commercial Precinct (Local Business Zone), accommodating uses such as boat servicing, storage and automotive servicing. A landscape supplies business operates from land zoned Low Density Residential, while a site zoned Light Industrial, located outside the Study Area on the periphery, appears to function primarily as general storage rather than active industrial use. The Study Area is not expected to support broader employment or industrial functions, which are anticipated to be primarily accommodated in higher-order centres, including Sorell and Greater Hobart.
- **Statewide strategic directions -** The Statewide Industrial Land Strategy identifies an undersupply of industrial land within the Sorell LGA, partly attributed to infrastructure constraints, particularly wastewater servicing. The strategy emphasises the importance of retaining and effectively servicing existing employment land in Dodges Ferry, rather than pursuing major expansion of industrial areas within the Southern Beaches.
- **Location and accessibility -** The Study Area's location and accessibility limit its suitability for logistics, freight-based or large-scale industrial activities. In contrast, Sorell and Greater Hobart perform established roles as the primary industrial and employment locations for the broader region.
- **Population-based demand -** Industrial demand within the Study Area is expected to be population-driven and locally servicing in nature, rather than employment-led. Forecast population growth is expected to support incremental, population-serving industrial demand, primarily associated with automotive services, storage, marine-related services and local servicing activities.
- **Scarcity of land and servicing constraints -** There is limited land available for business and employment uses across the Study Area, and infrastructure servicing constraints may further limit the capacity for new industrial development beyond low-intensity or light activities. Given this scarcity, land may be more effectively allocated to higher-order commercial or mixed-use outcomes rather than conventional industrial uses.
- **Resident workforce characteristics -** The resident workforce has a strong representation of construction and trade-based occupations. This profile is more likely to generate limited demand for small-scale warehouse, storage and contractor facilities rather than manufacturing or heavy industrial uses.
- **Limited business premises** - There is evidence of constrained availability of service-industrial business premises, which has likely limited the ability of businesses to establish or expand locally. This suggests that there is underlying demand beyond current observable activity, particularly given strong recent population growth, the strong representation of trades and construction-based workers within the resident population and stakeholder observations.
- **Development proposals -** The recently approved development at Old Forcett Road, adjacent to the Dodges Ferry Commercial Precinct for eighteen commercial/warehouse units of approximately 330 sqm each (5,940 sqm of warehouse floorspace), will represent a substantial increase in locally available industrial premises. This development is expected to absorb latent demand, and much of the short to medium-term demand generated by population-driven industrial and service-industrial uses.

Industrial Land Needs

Industrial demand within the Southern Beaches is expected to remain modest, locally driven and population-serving in nature, rather than employment-led or regionally significant. The local-serving role of the Southern Beaches does not warrant the need to consider new, standalone industrial precincts, but rather supports the direction of the Statewide Industrial Land Strategy to retain and support existing employment areas. However, it is recognised that there is likely latent demand for business premises, and demand may materialise progressively over time as the population grows and local business activity evolves.

The approved Old Forcett Road development is expected to meet much of the latent and short-medium term demand, however, it may not fully accommodate longer-term requirements undue to population growth and/or changing market conditions.

Industrial land demand within the Study Area is therefore best characterised as incremental and qualitative, rather than suited to conventional consumption, jobs-based or floorspace modelling.

Anticipated industrial land needs are likely to comprise:

- Small-scale industrial lots suitable for trades, storage, automotive, marine-related services, building services, boutique/artisan makers and local contractors, largely concentrated within the Dodges Ferry Commercial Precinct and supported by the planned Old Forcett Road development; and
- Low-intensity industrial and service-commercial uses, including warehousing and storage.

On this basis, an appropriate strategy is to consolidate and strengthen existing business areas, particularly the Dodges Ferry Commercial Precinct, as the primary focus for industrial and service-industrial activity.

Consideration should also be given to identifying longer-term "future expansion" opportunities adjacent to the Dodges Ferry Commercial Precinct. This would provide flexibility to accommodate additional demand beyond demand captured by the approved Old Forcett Road development, and existing vacant land supply, while ensuring that business and industrial activity remains consolidated within a clearly defined and well-located precinct.

6.5. Implications for the Structure Plan

- Confirm a limited, local-serving industrial role for Southern Beaches, with no expectation or requirement for large-scale or regionally significant industrial development.
- Recognise that the approved Old Forcett Road development will substantially increase industrial floorspace supply and is expected to meet latent and short-to-medium term demand.
- Acknowledge that additional demand may emerge over time, particularly associated with population growth, the resident trade-based workforce and tourism-related services.
- Retain and protect existing industrial and service-industrial land, particularly within and around the Dodges Ferry Commercial Precinct. Focus industrial and service-industrial activity within this precinct, to reinforce clustering, efficiency and amenity outcomes.
- Provide for potential “future expansion” areas adjacent to the Dodges Ferry Commercial Precinct, allowing for longer-term growth while avoiding dispersed or ad hoc industrial development. For example, this could consider land east of the proposed Old Forcett Road development.
- Prioritise small-scale, service-industrial uses, including trades, storage, marine and automotive services, building services and local producers.
- Recognise that infrastructure capacity (particularly wastewater servicing) will remain a key constraint on future industrial development and may limit the scale and timing of expansion.

Appendices

Appendix A: Retail Modelling Assumptions

Table 24: Expenditure Pool and Turnover Estimates

	2026	2036	2046
Expenditure Pool			
Scenario 1			
Primary	$142.2	$155.9	$170.9
Secondary	$205.7	$234.2	$266.8
Total	$347.8	$390.1	$437.7
Scenario 2			
Primary	$142.2	$155.9	$170.9
Secondary	$205.7	$258.0	$323.8
Total	$347.8	$413.9	$494.7
Scenario 3			
Primary	$142.2	$155.9	$170.9
Secondary	$205.7	$270.6	$355.9
Total	$347.8	$426.4	$526.9
Market Share			
Primary	9%	9%	9%
Secondary	3%	3%	3%
Estimated Turnover			
Scenario 1			
Resident	$19.1	$21.19	$23.57
Passing Trade	$4.7	$5.20	$5.80
Total Estimated	$23.7	$26.4	$29.4
Scenario 2			
Resident	$19.1	$21.99	$25.50
Passing Trade	$4.7	$5.44	$6.36
Total Estimated	$23.7	$27.4	$31.9
Scenario 3			
Resident	$19.1	$22.42	$26.59
Passing Trade	$4.7	$5.56	$6.67
Total Estimated	$23.7	$28.0	$33.3

Source: Urban Enterprise, 2026, derived from retail expenditure per capita, based on Spendmapp / MarketInfo (indexed)

Table 25: Turnover Density Assumptions

Retail Category	Turnover Density
Food, Liquor and Groceries	$8,000
Food Catering	$3,300
Apparel, Homewares and Leisure	$4,500
Retail Services	$3,200

Appendix B: Acronyms and Glossary of Terms

Table 26: Acronyms

Acronym	Expanded
AAG	Average Annual Growth
AAGR	Annual Average Growth Rate
ABS	Australian Bureau of Statistics
LGA	Local Government Area
SA	Statistical Area

Table 27: Glossary of Terms

Term	Expanded
Retail expenditure per capita	The average expenditure spent on retail per person, per annum.
Retail Turnover	Represents the total average revenue achieved by a retail premises per annum.
Retail Turnover Density	Represents the total turnover of the retail premises divided by the area (floorspace).

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