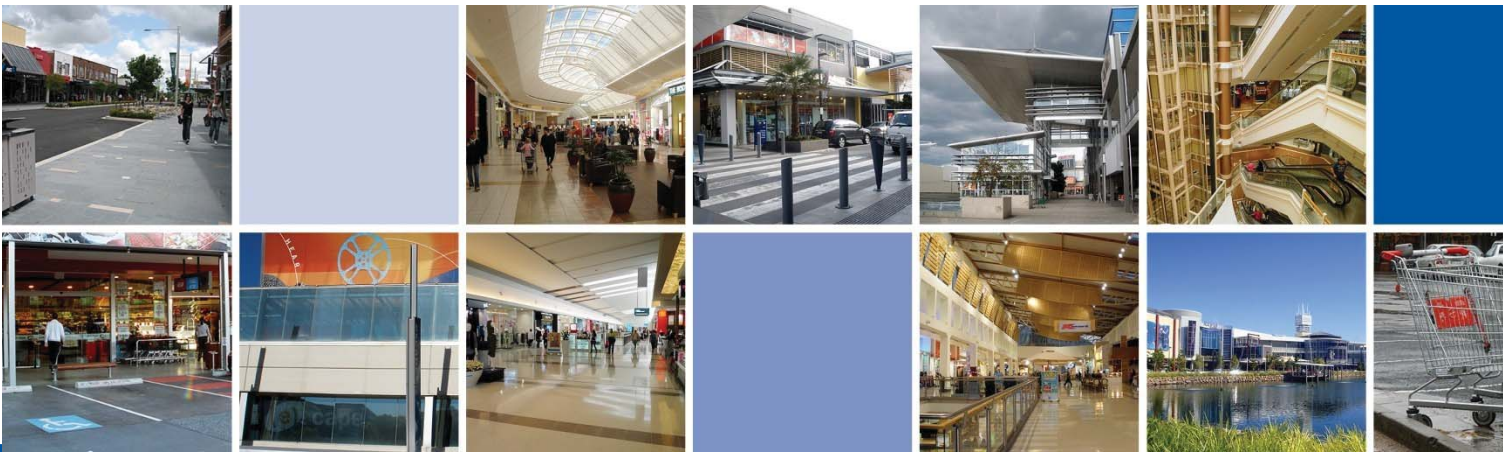


# North Coast Employment Land Review

March 2015



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## Introduction

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MacroPlan Dimasi has been commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Local Government Areas (LGA) that comprise the Mid and North Coast regions of New South Wales.

With a study period extending from 2011 to 2031, the following fifteen LGAs have been assessed: Byron; Ballina; Lismore; Kyogle; Richmond Valley; Clarence Valley; Coffs Harbour; Bellingen; Nambucca; Kempsey; Port Macquarie; Greater Taree; Gloucester and Great Lakes.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity', focusing on urban land zoned for business, industrial and special uses purposes. In addition to determining the market position, we advise on potential sources of future employment land.

In order to ascertain an employment land 'status' for each LGA, the following tasks have been performed:

1. Quantify the stock of existing employment floorspace/land;
2. Identify and measure future supply of employment floorspace/land;
3. Derive employment projections by industry;
4. Quantified demand for employment floorspace and land;
5. A market gap assessment.

Our investigation has considered the locational context and the 'character' of each LGA in isolation and as part of the greater North Coast region. As such, our projections and recommendations consider both industry-wide and local intrinsic drivers that are influencing demand for employment floorspace/land in each LGA.

We note that there are limitations associated with this report.

Difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development, which may impede business and employment growth in the North Coast region.

MacroPlan Dimasi advises the Department of Planning and Environment to undertake detailed analysis of local environmental and general development constraints such as flooding, topography and other potential constraints. This type of investigation is expected to result in greater certainty surrounding the delivery of future employment floorspace and land in each LGA.

Moreover, we also acknowledge that the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs. As a result of these locational and environmental constraints, more employment land may be required than suggested in this land assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, on-the-ground reconnaissance, DP&E population projections, DP&E issued land zone and floorspace ratio (FSR) planning GIS layers, previous studies, as well as considered feedback from the DP&E and each of the respective councils.

## Section 1: Economic and Employment Context

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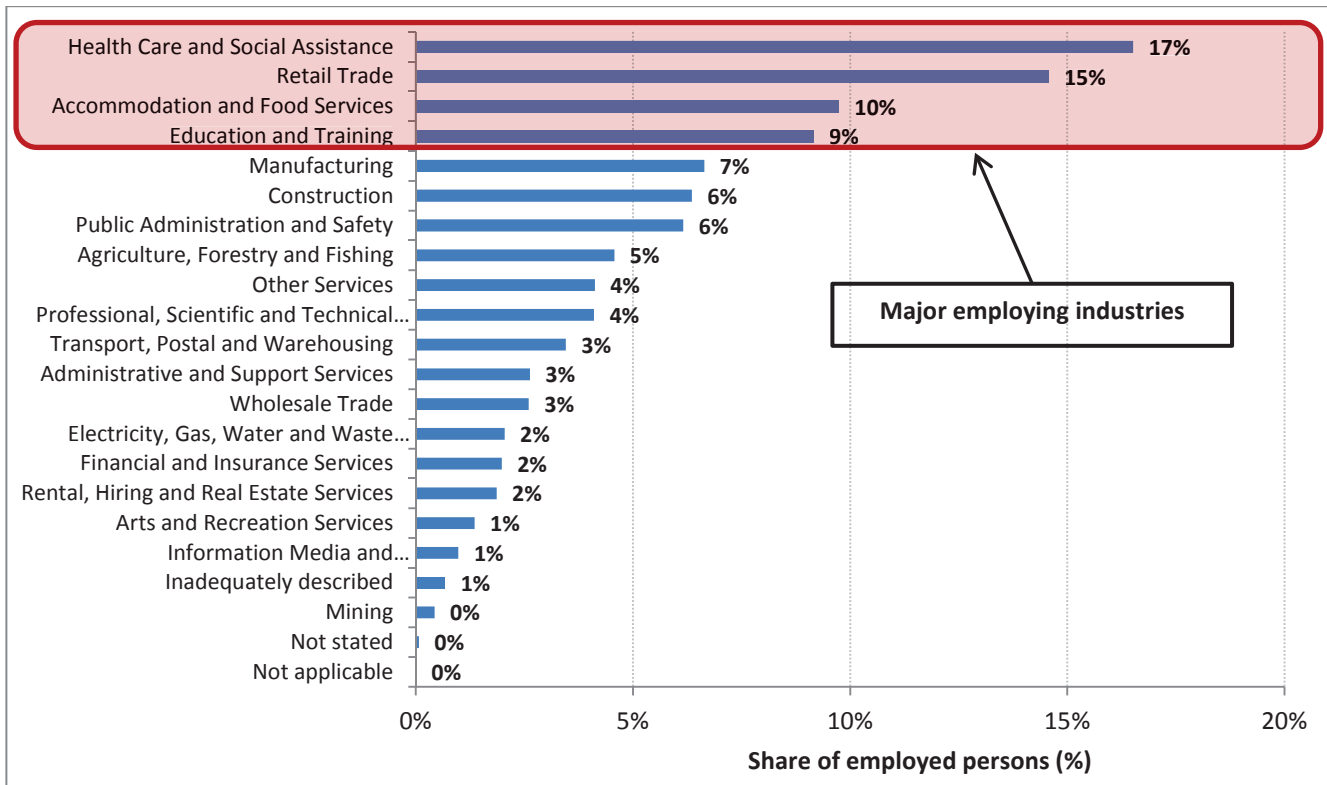
Originally entwined in agricultural and primary industries, the North Coast economy has evolved into an established, 'self-sustaining' region. It offers its residents homes, services and employment opportunities, and importantly across a diverse range of industries. Put simply, it is now a place in which people can live, work and play.

Entailing some of the eastern seaboard's most naturally blessed locations, the North Coast region is a popular tourist destination. The list of holiday spots is elongated, including Coffs Harbour, Byron Bay, Port Macquarie, Forster, Lismore, Taree, Grafton, Yamba, Lismore, Tweed Heads, Nambucca, Ballina and others.

The impact from tourism is considerable and widespread (from an expenditure and employment perspective), with tourist expenditure supporting jobs across a range of industries including Accommodation and Food Services and Retail Trade. The significance of tourism is evidenced by revenue figures for Byron LGA. According to the Byron Shire Council website, tourism expenditure exceeded \$382 million in 2011, supporting close to 2,400 jobs (full-time equivalents) across an array of industries.

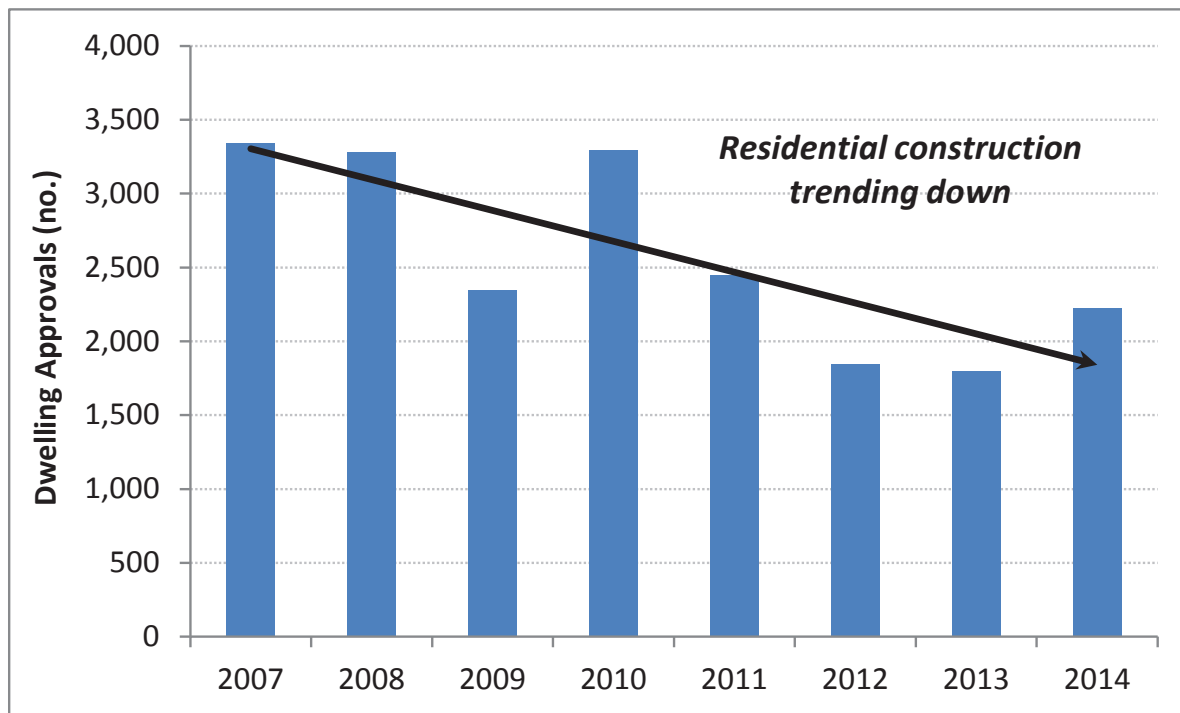
This interdependence is reflected in the region's current workforce composition. As at 2011, service denominated industries (which are synonymous with tourism and a growing local population) such as Retail Trade, Education and Training, Health Care and Social Assistance and Accommodation and Food Services, account for the majority of the local workforce. According to 2011 Census data, 51% of the region's workforce is engaged in these industries.

Figure 1 Employment Composition by Industry – North Coast (2011)



Source: Census of Population and Housing 2011

The North Coast region also has a significant manufacturing and construction presence. Combined, these two industries account for another 13% of the region’s workforce (as at 2011). However, following a period of weak housing construction (2009 to 2013) and fierce competition in the manufacturing sector (i.e. from cheaper international producers and increased off-shoring) across Australia, growth in these industries has been sparse, with the majority of North Coast LGAs registering outright job losses over the five years to 2011.

**Figure 2.** Number of Dwelling Approvals – North Coast (2007-2014)

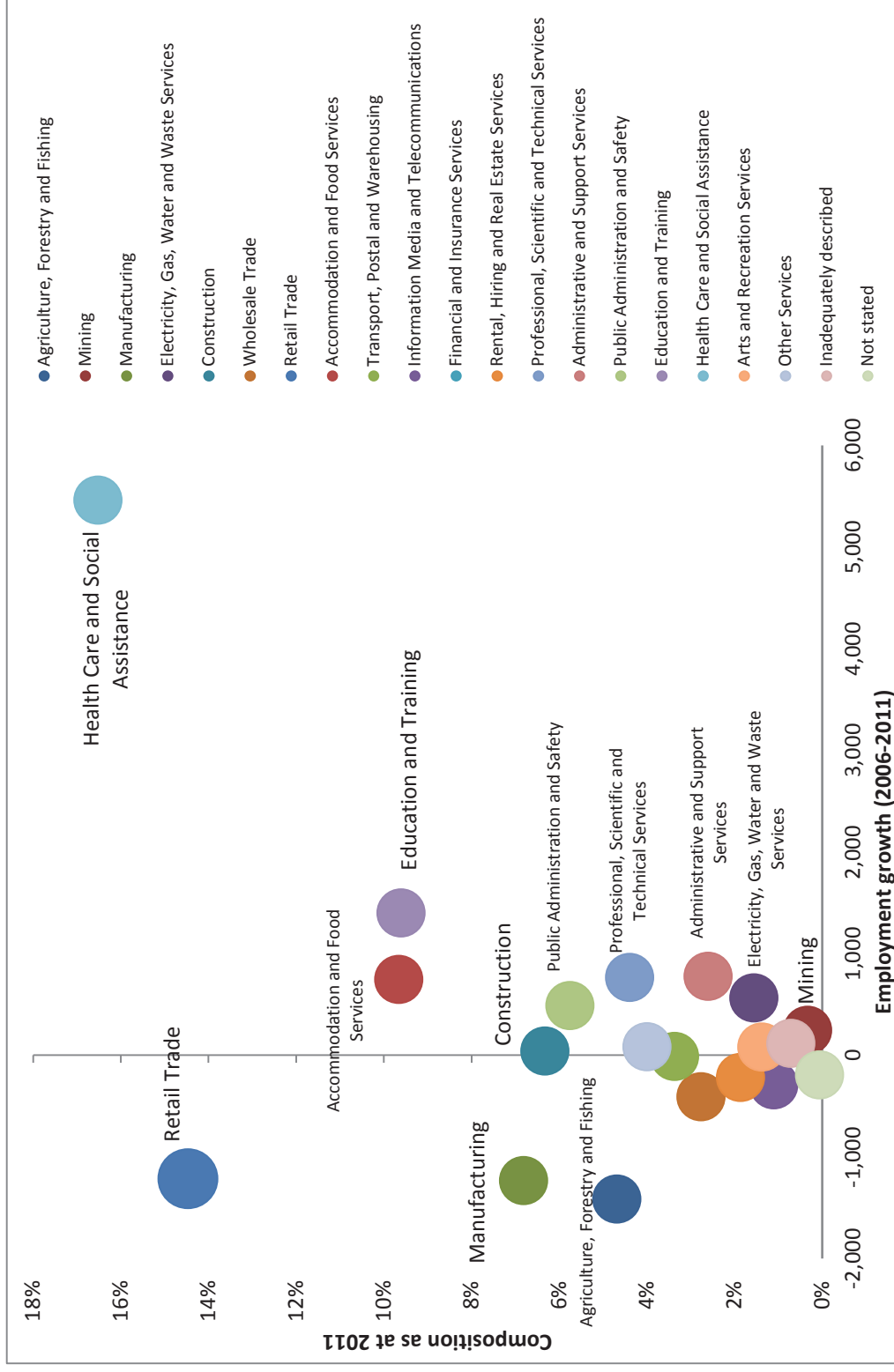
Source: 8731.0 Building Approvals, Australia

Benefitting from an abundance of natural amenity and coastal foreshore, the region's popularity is anticipated to gather momentum in the future. It will continue to be a 'home and workplace' for its residents, as well as a choice destination for visitors. This, however, means that the North Coast region and its economy rely heavily on visitation and sustained population increases for economic growth and overall prosperity.

### Employment Growth (2006-2011)

Between 2006 and 2011, the North Coast workforce expanded by 5,582 jobs, at an average rate of 1,116 jobs per annum. At 3,888 jobs, the Mid North region accounted for close to 70% of total jobs growth in the North Coast. The next chart presents jobs growth by industry composition for the North Coast region.

Figure 3. Employment Composition and Change – North Coast region (2006-2011)



Source: Census of Population and Housing (2011)

Key findings pertaining to our examination of historical (between 2006 and 2011) employment growth in the North Coast region include:

- Twelve (12) industries registered employment growth
- Nine (9) industries recorded outright job losses
- Jobs growth has been dominated by service-orientated and 'professional' industries
- Of all industries, job creation was most pronounced in Health Care and Social Assistance (+5,461), followed by Education and Training (+1,401)
- Traditional industries such as Agricultural, Forestry and Fishing (-1,414) and Manufacturing (-1,233) registered significant job losses
- The largest employing industry in 2006, the number of jobs in the Retail Trade industry contracted by 1,213 over the five years to 2011

Our analysis of employment by industry indicates the workforce profile of the North Coast region is undergoing change. Industries such as Manufacturing, Retail Trade and Agriculture, Forestry and Fishing, which have dominated employment in the past, have either contracted or experienced negligible growth recently. For example, employment in Retail Trade (the largest industry as at 2006), contracted by over 1,200 jobs between 2006 and 2011.

Census 2011 data indicates growth industries are service-oriented and population driven. Combined, Health Care and Social Assistance and Education and Training created an additional 6,862 jobs over the five years to 2011. This growth was in response to an expanding resident population and a pick-up in the rate of ageing. As a result, Health Care and Social Assistance has emerged as the largest employing industry in the North Coast region, engaging approximately 17% of the region's workforce.

There has also been a shift in professional or office based employment. The Professional, Scientific and Technical Services and Administrative and Support Services industries registered significant employment growth during this period – expanding by 1,544 jobs over the five years to 2011.

## Major Demographic Drivers

While remaining a popular tourist destination, the North Coast is also expected to face some major challenges in the future. Concurrent demographic shifts and broader market drivers are expected to play a crucial role in shaping the region's economy, particularly in population-driven industries e.g. Retail Trade, Education and Training and Health Care and Social Assistance. Key emerging demographic forces in the North Coast include:

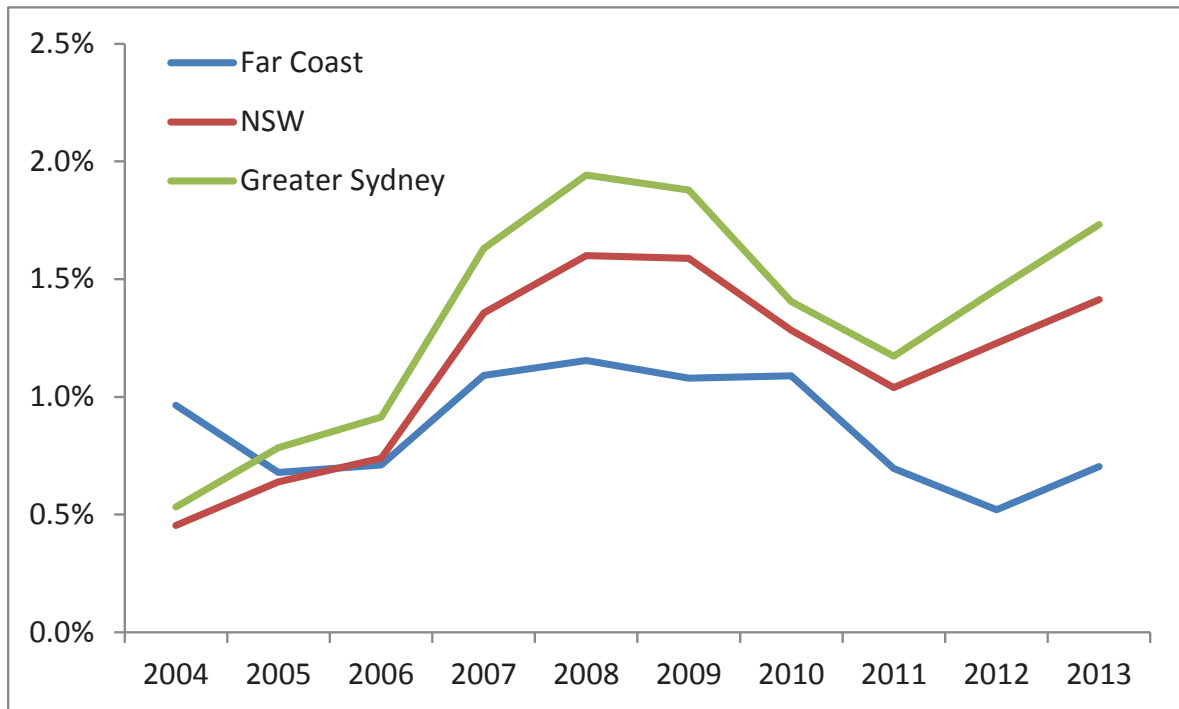
- A slower rate of population growth
- Pronounced ageing within the resident population
- Sustained outflows of young working adults

### Slower population growth

Between 1991 and 2001, the North Coast's resident population expanded by 79,312 persons, at an average rate of 1.6% per annum. This elevated rate of population growth has been underpinned by a wave of 'sea changers', who upon retirement, migrated from Sydney and other regions throughout New South Wales. Following this surge, a lower rate of population growth ensued of 0.8% per annum between 2001 and 2007.

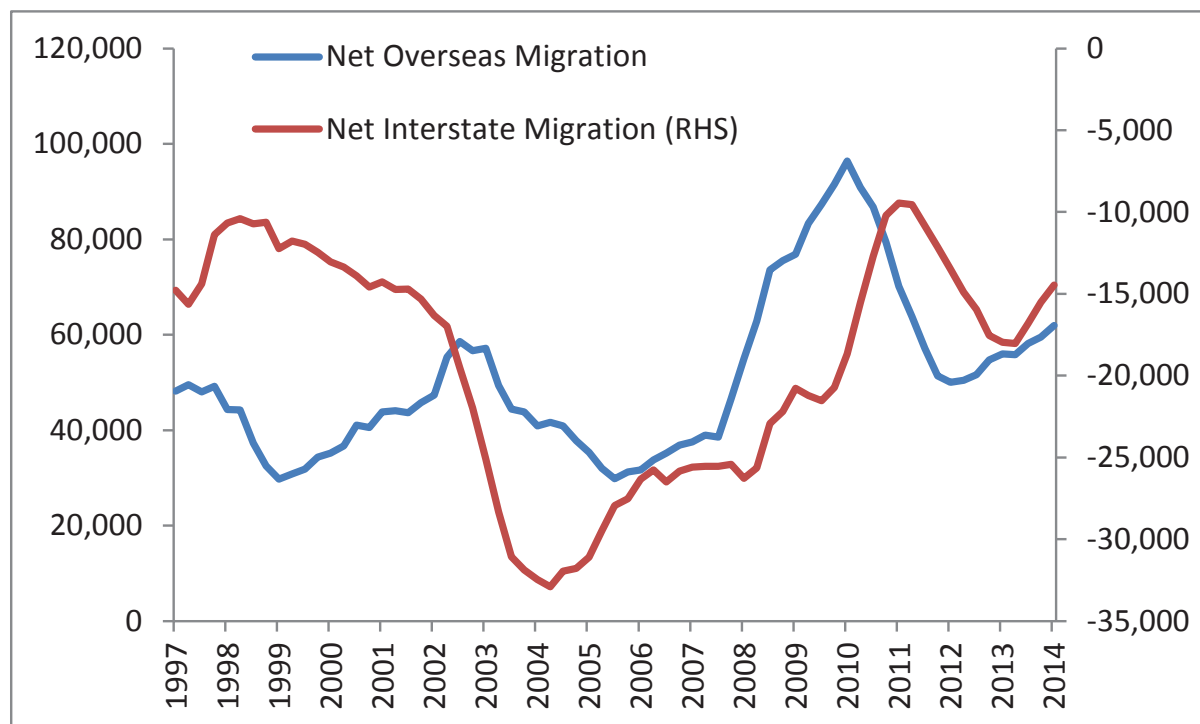
Over the three years to 2010, population growth recovered (averaging 1.0% per annum). While an improvement on the 2001 and 2007 period, the observed rate of growth remained below that recorded in Sydney (1.7% per annum) and New South Wales (1.5% per annum). Since 2010, population growth has deteriorated, to a new low point of just 0.6% per annum over the two years to 2013.



**Figure 4.** Population Growth – North Coast, NSW and Greater Sydney (2003-2013)

Source: 3218.0 Regional Population Growth, 2012-13

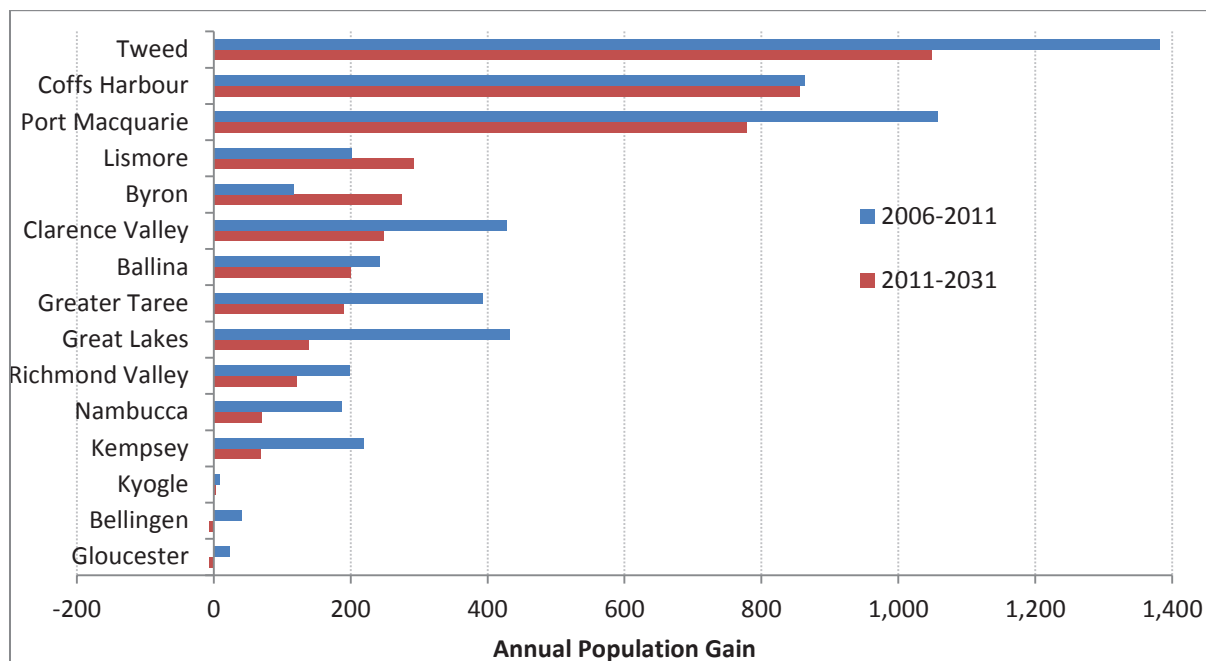
The impetus behind population growth in New South Wales and Sydney has been a surge in net overseas migration. Filling in the void left by local workers exiting the labour force, skilled migrants represented a 'quick fix' solution for supplementing diminishing labour resources. For New South Wales, net overseas migration surged in 2007, before peaking in 2008 (at 96,000 persons). While the overall level has eased from this peak level, it remains high by historical standards with 59,960 per annum since Dec 2009.

**Figure 5.** Net Migration – New South Wales (March 1996 – March 2014)

Source: 3101.0 Australian Demographic Statistics

For the North Coast region, overseas migration represented the second largest source of population growth. Over the five years to 2011, migration from this group amounted to 9,173 persons, accounting for 39% of total migration into the region (23,259 persons over this period). While high for the North Coast region, growth in overseas migration has not been on par with New South Wales and Sydney. Furthermore, the region also experienced a considerable outflow of 2,915 persons to interstate locations, predominantly Queensland.

The Department of Planning and Environment population projections indicate slower trend population growth for the North Coast. According to the recent August release, population growth in the North Coast is expected to average just 0.6% per annum between 2011 and 2031. This anticipated rate of expansion is significantly below that experienced during the 1990s, but equivalent to that observed over the three years to 2013 – which was a low-growth period. Sustained low population growth is expected to have significant repercussions on the North Coast region.

**Figure 6.** Historical and Projected Annual Population Change by LGA (2006-2011 & 2011-2031)

Source: *Census of Population and Housing (2011)*; *Department of Planning and Environment (2014)*

According to DP&E projections, the three most populated LGAs are expected to incur the majority of the region's population growth, accounting for 62% of the gain. In contrast, minor reductions are anticipated for two of the region's least populous LGAs between 2011 and 2031 – Gloucester -150 persons and Bellingen -100 persons<sup>1</sup>.

### Pronounced ageing and retention of young working adults

The North Coast's resident population is ageing. Representation amongst 65+ persons has increased from 18.4% in 2003 to 22.1% as at 2013.

Rising representation from this group has been underscored by solid growth. Over the decade to 2013, the number of 50+ persons increased on average by 2.6% per annum, and for 65+ residents, 2.7% per annum. A proportion of this increase can be attributed to net migration of senior residents into the North Coast from Sydney and other NSW locations, which totalled 4,295 persons over the five years to 2011.

<sup>1</sup> Based on 'LGA Summary' projections

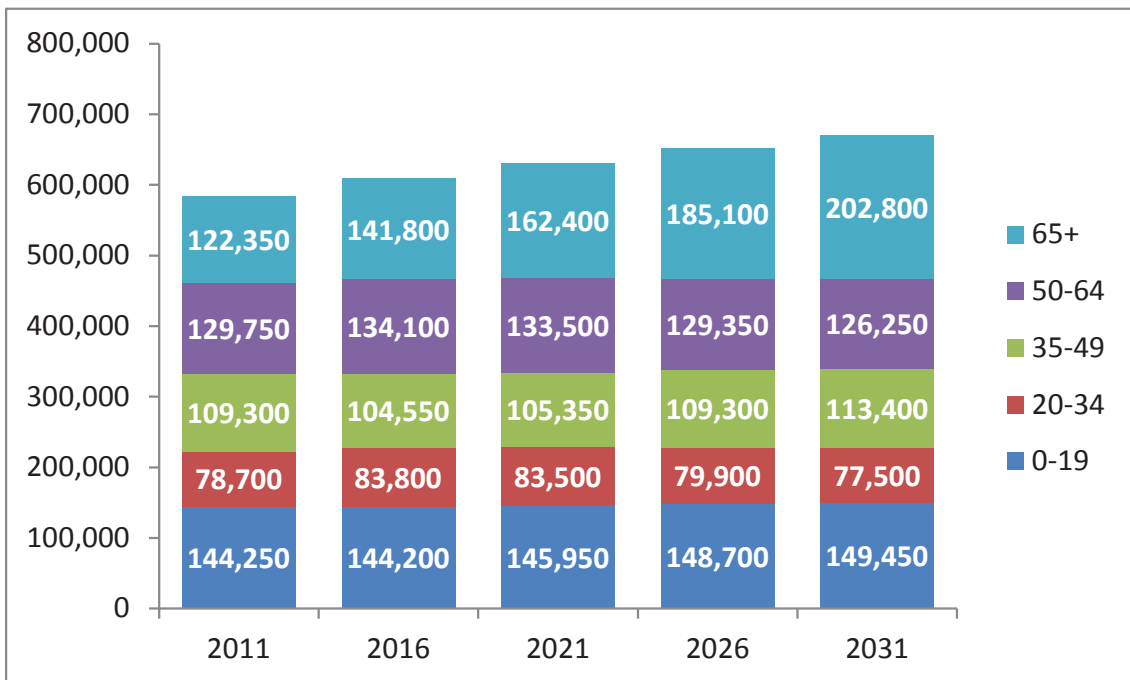
**Table 1.1**  
Population Growth by Age - North Coast (2003 - 2013)

Age Cohort	2003	2013	Annual Growth
0 -19	146.1	143.5	-0.2%
20-34	77.0	79.6	0.3%
35-49	116.1	105.6	-0.9%
50-64	103.2	131.9	2.5%
65+	99.8	130.7	2.7%
<b>Total</b>	<b>542.3</b>	<b>591.3</b>	<b>0.9%</b>

Source: 8731.0 Building Approvals, Australia

At the same time, growth in young working residents was negligible. According to ABS population statistics, the number of 20-34 year olds remained static between 2003 and 2013 – increasing by just 0.3% per annum. Low growth in this cohort is consistent with migration data, which exhibited a net outflow of young working adults to other regions (3,878 persons over the five years to 2011).

**Figure 7.** Population Growth by Age – North Coast (2011-2031)



Source: Department Planning & Environment (2014)

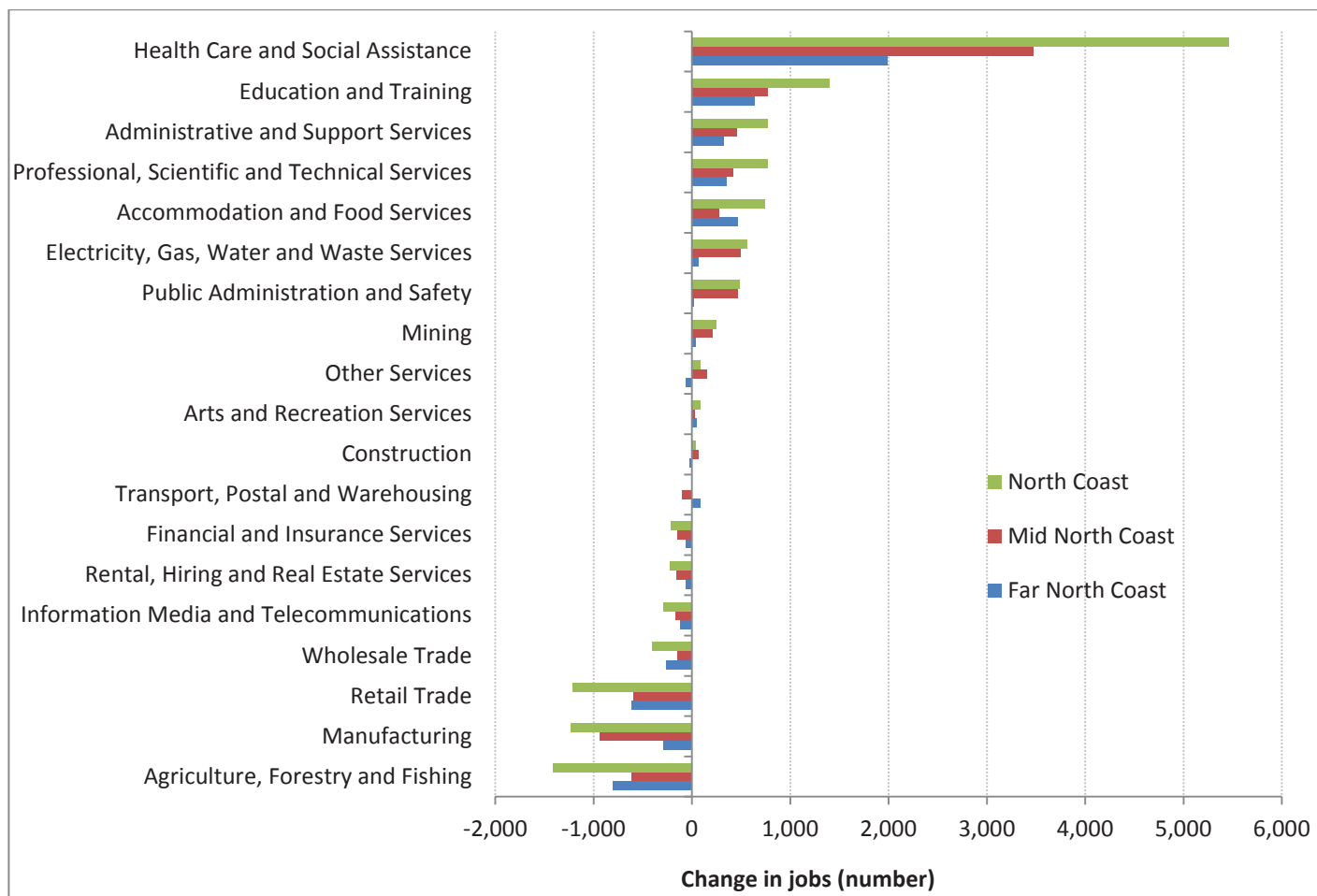
According to DP&E projections, population growth is expected to be most pronounced in the 65+ age cohort. At 2011, persons aged 65+ accounted 21% of the region's population, however by 2031, this proportion is expected to rise to 30%, taking the total population within the age cohort to approximately 202,800 (growth of 80,450 persons). Moreover, the number of 20-34 year olds is expected to drop by 1,200 persons between 2011 and 2031.

### **Direct Implications from Demographic Changes**

These concurrent demographic forces are likely to present the region with many challenges in the future, many of which centre on the region's ability to supplement the rate of retirement.

Combined with weak growth in young working adults (retention of locals or from migration), it is expected labour shortages will eventuate in the North Coast region, particularly as the rate of retirement increases (in line with DP&E projections). In the future, this may hinder the region's ability to provide services to an ageing and growing resident population.

Opportunities are also expected to present from ageing. The rapid expansion in senior citizens is expected to support growing demand for health and social services. Already the largest employing industry in the region (17%), jobs in Health Care and Social Assistance grew by an additional 5,460 jobs between 2006 and 2011.

**Figure 8.** Employment Change by Industry – North Coast region (2006-2011)

Source: Census of Population and Housing (2011)

Consistent with its employment profile, there has been solid investment in health and aged care capacity in the North Coast region. According to ABS Building Approvals data, the value of health building approvals averaged \$106.8 million over the two years to 2014 – a 420% increase on that recorded over the six years to 2012. Similarly, the value of aged care building approvals has been solid, averaging \$38.4 million per annum since 2007.

In preparation for the anticipated growth in senior citizens, there is a significant volume of health building projects currently underway, and more planned for the future. Current and planned major hospital projects in the North Coast region include:

1. Port Macquarie Base Hospital Expansion project (\$110 million)
2. Kempsey Hospital Redevelopment project (\$81 million)
3. Lismore Base Hospital Redevelopment project (\$80 million)

4. The new Byron Central Hospital project (\$80 million)
5. Greater Taree Base Hospital Redevelopment project (\$26 million)
6. A new multi-purpose medical and allied health clinical education centre in Taree LGA (located within the grounds of the Manning Base Hospital)
7. Redevelopment of the Casino and District Memorial Hospital (redeveloped emergency department and four new treatment bays and two resuscitation bays).

An ageing population will continue to support demand for health services at traditional health facilities such as hospitals, as well as at other facilities such as aged care villages and private residential dwellings (through home care services). The ability of this industry to facilitate rapid employment growth in the wake of the GFC demonstrates its resilience to adverse economic settings – empirically, demand for health services is immune from cyclical fluctuations. Significant growth is expected in the future.

**Table 1.2**  
Average Annual Health Building Approvals by LGA (\$m) - 2007-2014

LGA	2007 - 2012 Annual Average	2013 - 2014 Annual Average
Port Macquarie - Hastings	3.1	43.4
Lismore	5.4	26.6
Kempsey	0.2	22.8
Greater Taree	1.4	5.1
Coffs Harbour	8.4	2.7
Tweed	1.0	2.2
Clarence Valley	4.5	2.0
Nambucca	0.1	0.6
Byron	0.1	0.4
Gloucester	0.0	0.4
Kyogle	0.2	0.3
Richmond Valley	0.1	0.2
Ballinga	0.3	0.1
Great Lakes	0.3	0.0
Bellingen	0.2	0.0
<b>North Coast</b>	<b>25.4</b>	<b>106.8</b>

Source: 8731.0 Building Approvals, Australia

## Industry Outlook

### Traditional Industries

Structural change is apparent in the North Coast. In line with national trends, traditional labour intensive industries such as Manufacturing and Agriculture, Forestry and Fishing are making way for higher-order service and professional industries (Health Care and Social Assistance etc.). Employing approximately 11.5% of the region's workforce, job losses in these industries have been significant –2,627 jobs were shed over the five years to 2011. This contraction has been underpinned by a historically high Australian dollar, subdued demand and increased international competition.

Looking forward, the decline in Manufacturing's share of total employment is set to continue. Similarly, the long term outlook for the Agriculture, Forestry and Fishing industry is expected to be weak, due to continued consolidation in the industry. While growth has been registered in some LGAs (e.g. manufacturing jobs increased in Kyogle, Richmond Valley and Nambucca LGAs), broader market forces (e.g. international competition and consolidation) are expected to present significant challenges for these industries in the future.

For the Construction industry, weak residential building activity has hindered employment growth with just 42 jobs created over the period. In the absence of the Pacific Highway upgrades, MacroPlan Dimasi expects outright job losses would have eventuated.

In the absence of new infrastructure projects and sustained non-residential construction (particularly in health), the outlook for the construction industry is uncertain. While housing and demographic fundamentals all point to a property market upturn, significant service and infrastructure costs are expected to limit the scope of a recovery.

However, on the balance, residential construction in the North Coast region is expected to be underscored by an ageing population and inflows of retiree households from other locations. When combined with continued investment in non-residential buildings (e.g. health, industrial, education airports, retail and commercial) it is expected there will be jobs created in the construction sector.



## Tourism

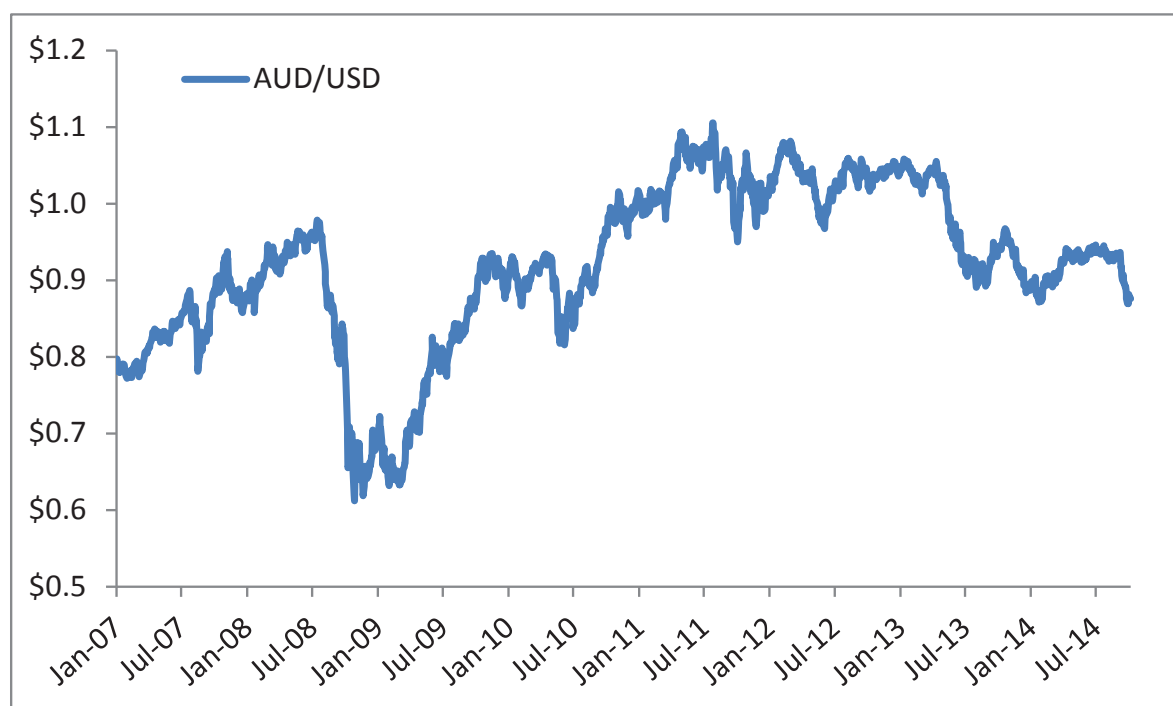
Tourism, along with other trade-exposed sectors such as Manufacturing and Agriculture, is prone to broader market forces and changes in consumer expectations.

As noted previously, the importance of tourism to the North Coast local economy is significant. As at 2011, 26% of all jobs in the region were within designated tourism industries such as Accommodation and Food Service, Retail Trade and Arts and Recreation Services.

Since a low point of \$0.60 against the US Dollar in November 2008, the Australian dollar has appreciated significantly, where in May 2011 it reached US\$1.10 - its highest point since the dollar was floated in 1983.

From an international perspective, the high Australian dollar has impacted the local tourism sector – a high dollar reduces the relative ‘attractiveness’ of Australia as a destination. While visitation from international tourists did improve since 2012 (5% over the 12 month period), growth could have been much greater if the Australian dollar had been lower.

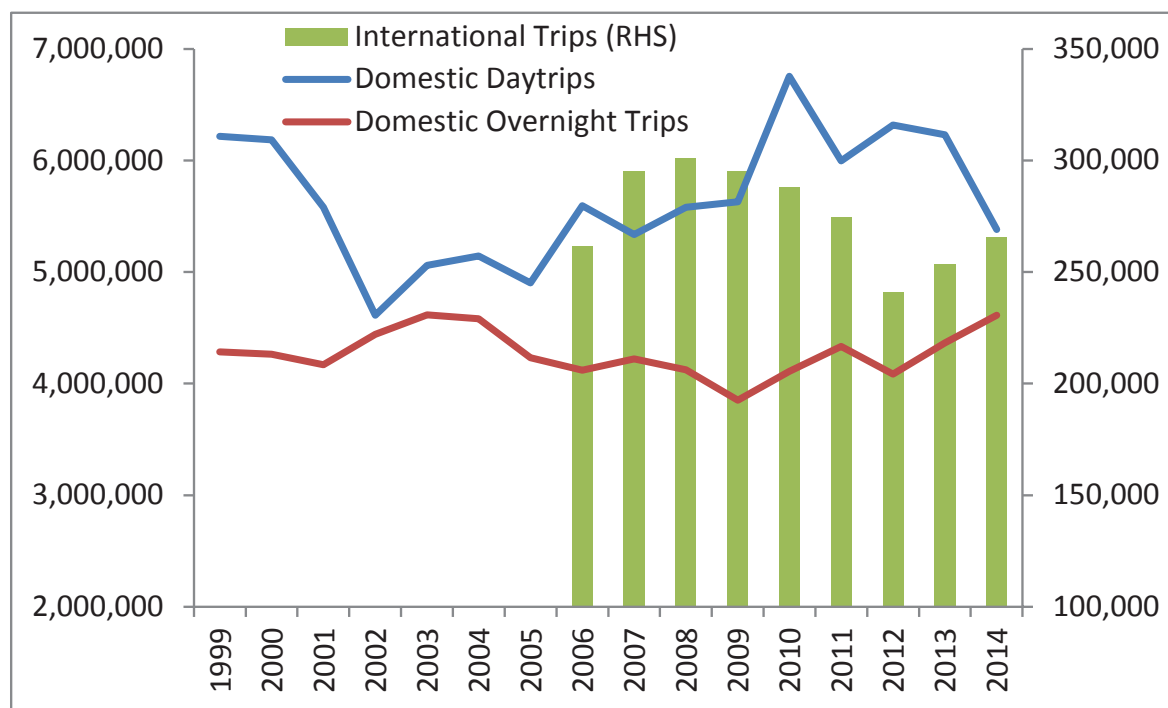
**Figure 9.** AUD/USD Spot Rate (January 2007- September 2014)



Source: RBA, MacroPlan Dimasi

Moreover, a higher dollar increased the purchasing power of Australians travelling abroad. This environment coupled with airfare discounting amongst international carriers resulted in a large volume of Australians leaving the country for holidays.

**Figure 10.** Domestic and International Trips (1999–2014)



Source: Tourism Research Australia

Unlike other dominant tourist destinations such as Queensland’s Sunshine Coast and Gold Coast, domestic tourist numbers within the NC have fared a little better as a decline in domestic daytrips has coincided with an improvement in domestic overnight trips. Nevertheless, domestic tourism numbers have weakened over the past 12 months, in the order of -6%. Moreover, over the 12 months to June 2014, the number of domestic daytrips to the region totalled 5.38 million which represents a decline of 14% over the 12 months previous.

To a degree, this has resulted in job losses in the region’s second largest employing industry (retail trade), amounting to 1,213 jobs over the five years to 2011. While some of this could be attributed to subdued local consumer confidence (due to the GFC), weak growth in tourist volumes did not augur well for this industry.

More recently, the Australian dollar has depreciated (down to around 0.80 AUD per USD as at December 2014), and is on course to drop further by the end of 2015 (to 0.70–0.75 AUD). Given that the international segment has been less responsive than the

domestic sector, a depreciating Australian dollar will surely result in greater overall patronage to the North Coast. This is reflected in planned airport and tourism related upgrades in the North Coast region, including the Ballina-Byron Gateway Airport and the Grafton Regional Airport expansion projects, and the beach replenishment and upgrade of the Kingscliff Beach Holiday Park.

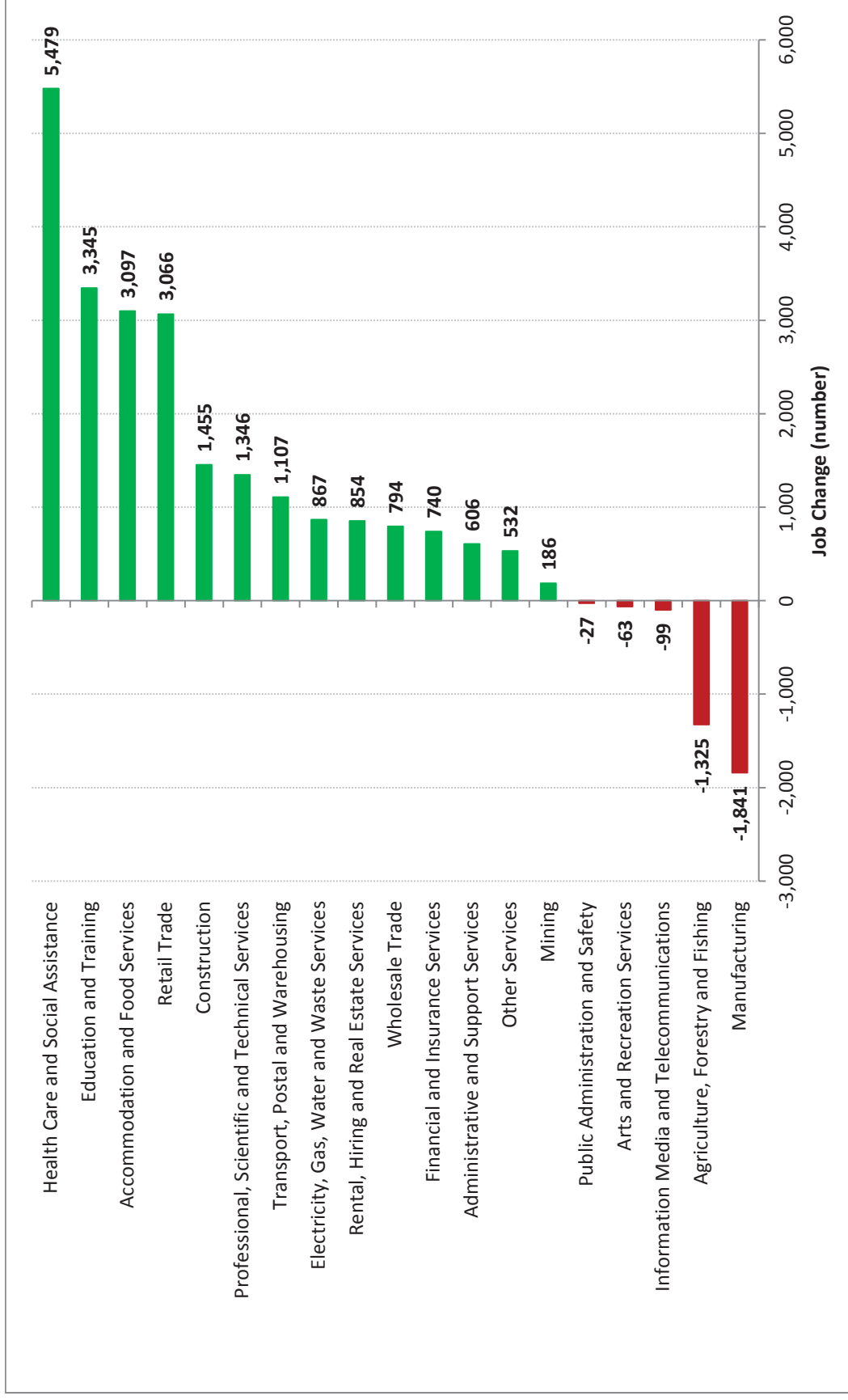
## Employment Projections

MacroPlan Dimasi employment projections consider anticipated demographic and labour market drivers, as well as the ability of industry to generate employment in the North Coast region. Employment change by industry for the North Coast region is presented in the next chart.

These projections are characterised by:

1. An expected expansion in the North Coast regions' workforce with 930-940 additional jobs per annum between 2011 and 2031.
2. Sustained growth in service-orientated industries, attending to the needs of residents and visitors
3. Pronounced growth in the Health Care and Social Assistance, Education and Training, Retail Trade and Accommodation and Food Services.
4. Continued job losses in traditional industries such as Agriculture, Forestry and Fishing and Manufacturing – albeit at a slower pace relative to the 2006-2011 period

**Figure 11.** Employment Change by Industry, North Coast (2011-2031)



Source: MacroPlan Dimasi (2014)

## Employment Land Need and Capacity

To accommodate employment growth, it is anticipated current commercial, industrial and special use capacity will need to be increased. Overall, MacroPlan Dimasi estimates that employment and economic growth in the North Coast region will require an additional (as a minimum) 77 hectares of business, 67 hectares of industrial and 35.1 hectares of special use floorspace over the forecast period (to 2031).

Land Use zone	Floorspace Demand (hectares)	Land Required (hectares)
Business*	77.0	104.4
Industrial	67.0	101.2
Special Uses	35.1	37.9

*\*Business includes retail and commercial*  
Source: MacroPlan Dimasi

Having regard for observed and average floorspace ratios throughout the North Coast region, it is estimated approximately 104.4 hectares of business, 101.2 hectares of industrial and 37.9 hectares of special uses of zoned land will be required to accommodate employment growth over the forecast period to 2031.

Overall, at a regional level there is sufficient zoned employment land to fulfil the future employment needs of the North Coast region. As at 2031, it is estimated:

- Supply of business land will exceed demand by 358.2 hectares
- Supply of industrial land will exceed demand by 2,519.1 hectares
- Supply of special uses land will exceed demand by 1024.7 hectares

Land Use	Demand (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Surplus (Deficit)
Business*	104.4	442.0	20.6	462.6	358.2
Industrial	101.2	991.4	1,628.9	2,620.3	2,519.1
Special Uses	37.9	1,054.9	7.7	1,062.6	1,024.7

\*Business includes retail and commercial  
Source: MacroPlan Dimasi (2014)

However, local environmental constraints, difficulties associated with redeveloping existing urban lands and the cost of delivering services (i.e. utilities, roads and upgrades) could reduce the scope of land available for future development, meaning more land may be required.

Moreover, a development outcome requires a 'locational' union between supply and demand. As such the location of zoned land may not be appropriate or consistent with market requirements or the needs of new and emerging businesses, which may also require additional land above current estimates be made available.

Notably, there are specific exceptions to this broader 'regional' outcome for business zoned (and future) land, including the LGAs of Byron, Tweed, Bellingen and Richmond Valley.

To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land. Moreover, greater utilisation of existing B4 Mixed Use land is another plausible solution, which in general is largely underdeveloped in the North Coast region.

Notably, it is estimated a deficiency of special use zoned land will materialise in two LGAs – Kyogle and Richmond Valley. It is believed some demand for health services (and hence employment) will be accommodated in commercial/retail premises, as well as at aged care facilities and private residential dwellings (i.e. home care)

While there is an adequate stock of industrial zoned land, MacroPlan Dimasi anticipates the majority of development in this category will occur at existing industrial parks – either through redevelopment or extension of existing industrial

parks. Latent land from a receding manufacturing industry is expected to rise, and could potentially be absorbed by growing industrial sectors such as transport, logistics and warehousing (through redevelopment).

## Conclusion

Over the next 20 years, the greatest influence on the region will stem from its aged population, from a labour supply perspective. Coupled with weak growth amongst young working adults, the region's ability to provide required services will be tested.

However, an ageing population, improved consumer confidence, a lower Australian dollar and greater visitation are expected to deliver benefits to the North Coast region. In summary, key growth opportunities include:

- Retirement and aged care services – ageing within the local population and in traditional regions in NSW (e.g. Sydney) is expected to underscore demand for retirement and aged care product in the North Coast.
- In line with the region's evolving demographic forces (i.e. ageing), demand for health services is expected to increase significantly. This situation will be particularly true for Healthcare and Social Assistance, both in terms of patient demand and qualified healthcare workers. In essence, this is expected to present employment opportunities, and in effect stymie the outflow of young working residents from the region.
- Tourism services (Accommodation and Food Services, Retail Trade etc.) – as the Australian dollar depreciates and competition amongst international carriers subsides, the volume of domestic visitors to the North Coast is expected to increase significantly (at the expense of overseas travel). The flow-on benefits are expected to be widespread, creating part-time and full-time jobs across a range of industries.
- Industry diversification and more employment opportunities will help retain young workers in the region, as well as entice others who currently live in other locations, which will in turn support population driven industries such as Education and Training and Retail Trade.

- Transport, logistics and warehousing – When combined with sustained reliance on imports, the Pacific Highway upgrades will provide opportunities for transport, logistics and warehousing operators and spur investment in industrial premises (e.g. Northern Gateway Transport Hub).

On the other hand, the outlook for traditional industries is unfavourable, with further contractions anticipated in the Manufacturing and Agriculture, Forestry and Fishing industries. Even with a depreciating dollar, competition from international producers (due to lower labour and operating costs) is expected to undermine production in the North Coast. There are however, some exceptions to this, with some LGAs such as Kyogle, which is anticipated to benefit from specialised manufacturing activities.

In the absence of new infrastructure projects and sustained non-residential construction activity (particularly health related), the outlook for the construction industry is uncertain. While housing and demographic fundamentals all point to a property market recovery, significant service and infrastructure impediments are expected to limit the scope of the recovery.

However, on the balance, an ageing population and a sustained inflow of retirees are expected to support residential construction activity in the North Coast region. When combined with continued investment in non-residential buildings (e.g. health, industrial, education airports, retail and commercial) it is expected employment growth will be realised in this sector.



## Section 1: Economic and Employment Context

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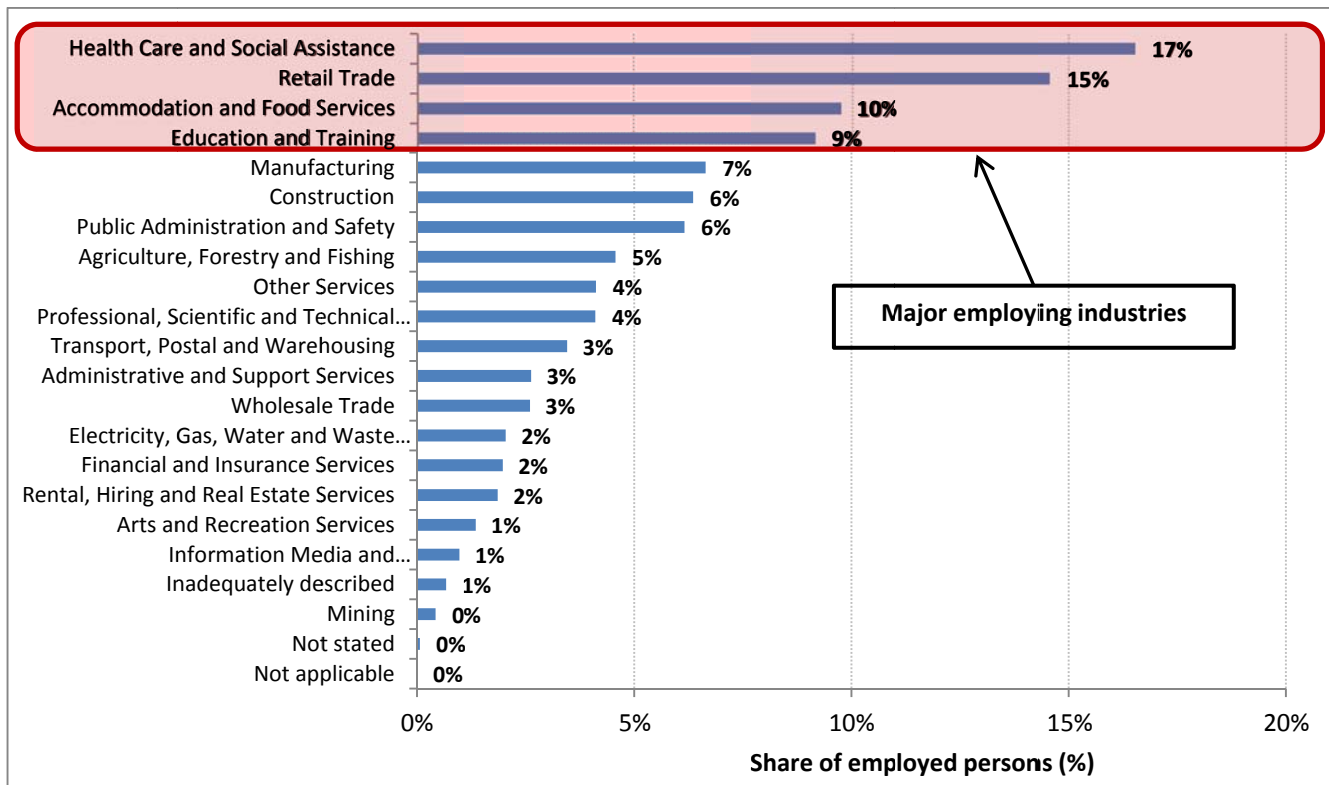
Originally entwined in agricultural and primary industries, the North Coast economy has evolved into an established, 'self-sustaining' region. It offers its residents homes, services and employment opportunities, and importantly across a diverse range of industries. Put simply, it is now a place in which people can live, work and play.

Entailing some of the eastern seaboard's most naturally blessed locations, the North Coast region is a popular tourist destination. The list of holiday spots is elongated, including Coffs Harbour, Byron Bay, Port Macquarie, Forster, Lismore, Taree, Grafton, Yamba, Lismore, Tweed Heads, Nambucca, Ballina and others.

The impact from tourism is considerable and widespread (from an expenditure and employment perspective), with tourist expenditure supporting jobs across a range of industries including Accommodation and Food Services and Retail Trade. The significance of tourism is evidenced by revenue figures for Byron LGA. According to the Byron Shire Council website, tourism expenditure exceeded \$382 million in 2011, supporting close to 2,400 jobs (full-time equivalents) across an array of industries.

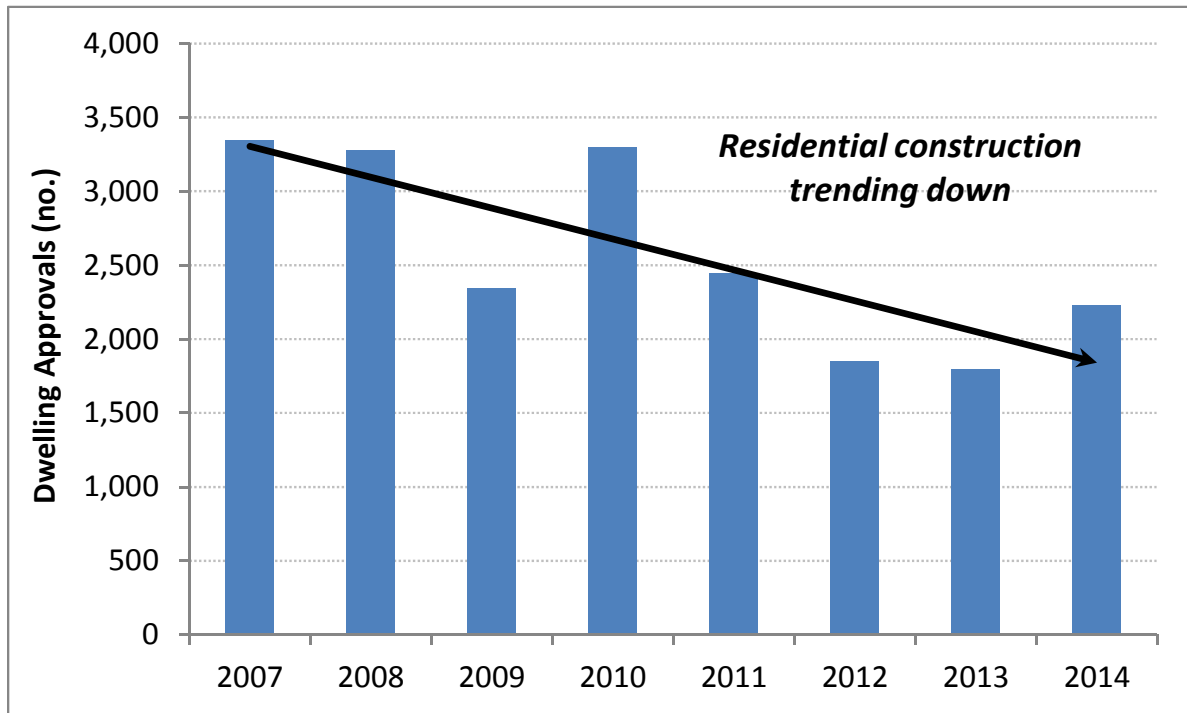
This interdependence is reflected in the region's current workforce composition. As at 2011, service denominated industries (which are synonymous with tourism and a growing local population) such as Retail Trade, Education and Training, Health Care and Social Assistance and Accommodation and Food Services, account for the majority of the local workforce. According to 2011 Census data, 51% of the region's workforce is engaged in these industries.

Figure 1 Employment Composition by Industry – North Coast (2011)



Source: Census of Population and Housing 2011

The North Coast region also has a significant manufacturing and construction presence. Combined, these two industries account for another 13% of the region's workforce (as at 2011). However, following a period of weak housing construction (2009 to 2013) and fierce competition in the manufacturing sector (i.e. from cheaper international producers and increased off-shoring) across Australia, growth in these industries has been sparse, with the majority of North Coast LGAs registering outright job losses over the five years to 2011.

**Figure 2.** Number of Dwelling Approvals – North Coast (2007-2014)

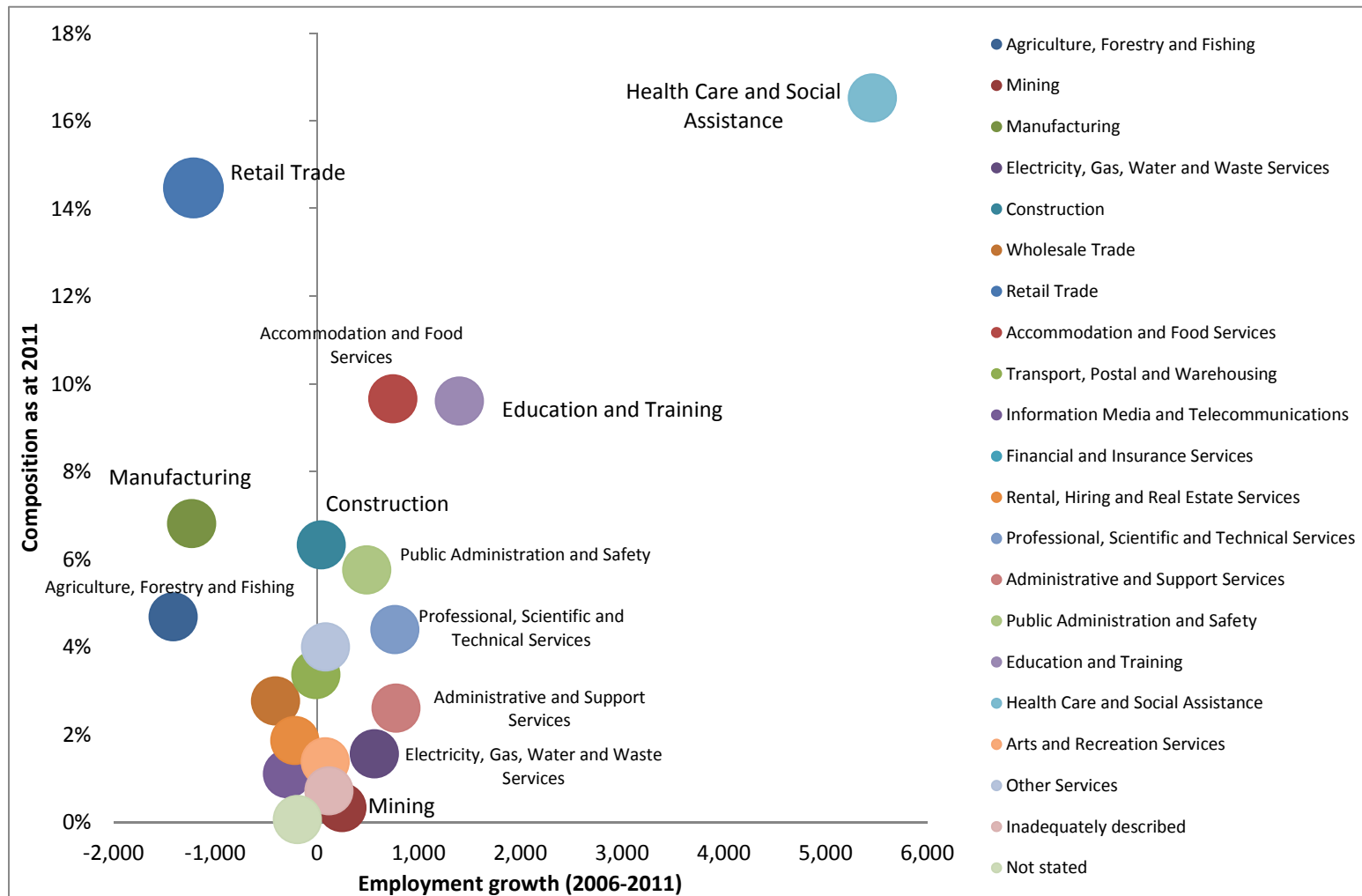
Source: 8731.0 Building Approvals, Australia

Benefitting from an abundance of natural amenity and coastal foreshore, the region's popularity is anticipated to gather momentum in the future. It will continue to be a 'home and workplace' for its residents, as well as a choice destination for visitors. This, however, means that the North Coast region and its economy rely heavily on visitation and sustained population increases for economic growth and overall prosperity.

### Employment Growth (2006-2011)

Between 2006 and 2011, the North Coast workforce expanded by 5,582 jobs, at an average rate of 1,116 jobs per annum. At 3,888 jobs, the Mid North region accounted for close to 70% of total jobs growth in the North Coast. The next chart presents jobs growth by industry composition for the North Coast region.

**Figure 3.** Employment Composition and Change – North Coast region (2006-2011)



Source: Census of Population and Housing (2011)

Key findings pertaining to our examination of historical (between 2006 and 2011) employment growth in the North Coast region include:

- Twelve (12) industries registered employment growth
- Nine (9) industries recorded outright job losses
- Jobs growth has been dominated by service-orientated and 'professional' industries
- Of all industries, job creation was most pronounced in Health Care and Social Assistance (+5,461), followed by Education and Training (+1,401)
- Traditional industries such as Agricultural, Forestry and Fishing (-1,414) and Manufacturing (-1,233) registered significant job losses
- The largest employing industry in 2006, the number of jobs in the Retail Trade industry contracted by 1,213 over the five years to 2011

Our analysis of employment by industry indicates the workforce profile of the North Coast region is undergoing change. Industries such as Manufacturing, Retail Trade and Agriculture, Forestry and Fishing, which have dominated employment in the past, have either contracted or experienced negligible growth recently. For example, employment in Retail Trade (the largest industry as at 2006), contracted by over 1,200 jobs between 2006 and 2011.

Census 2011 data indicates growth industries are service-oriented and population driven. Combined, Health Care and Social Assistance and Education and Training created an additional 6,862 jobs over the five years to 2011. This growth was in response to an expanding resident population and a pick-up in the rate of ageing. As a result, Health Care and Social Assistance has emerged as the largest employing industry in the North Coast region, engaging approximately 17% of the region's workforce.

There has also been a shift in professional or office based employment. The Professional, Scientific and Technical Services and Administrative and Support Services industries registered significant employment growth during this period – expanding by 1,544 jobs over the five years to 2011.

## Major Demographic Drivers

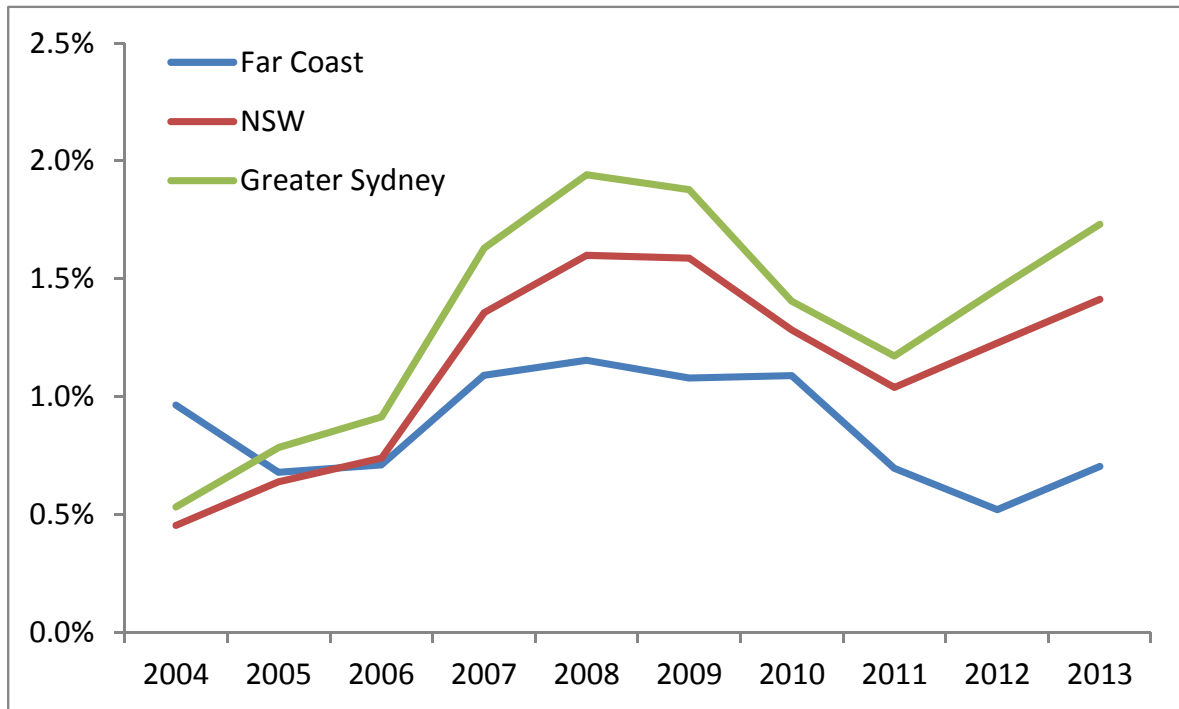
While remaining a popular tourist destination, the North Coast is also expected to face some major challenges in the future. Concurrent demographic shifts and broader market drivers are expected to play a crucial role in shaping the region's economy, particularly in population-driven industries e.g. Retail Trade, Education and Training and Health Care and Social Assistance. Key emerging demographic forces in the North Coast include:

- A slower rate of population growth
- Pronounced ageing within the resident population
- Sustained outflows of young working adults

### Slower population growth

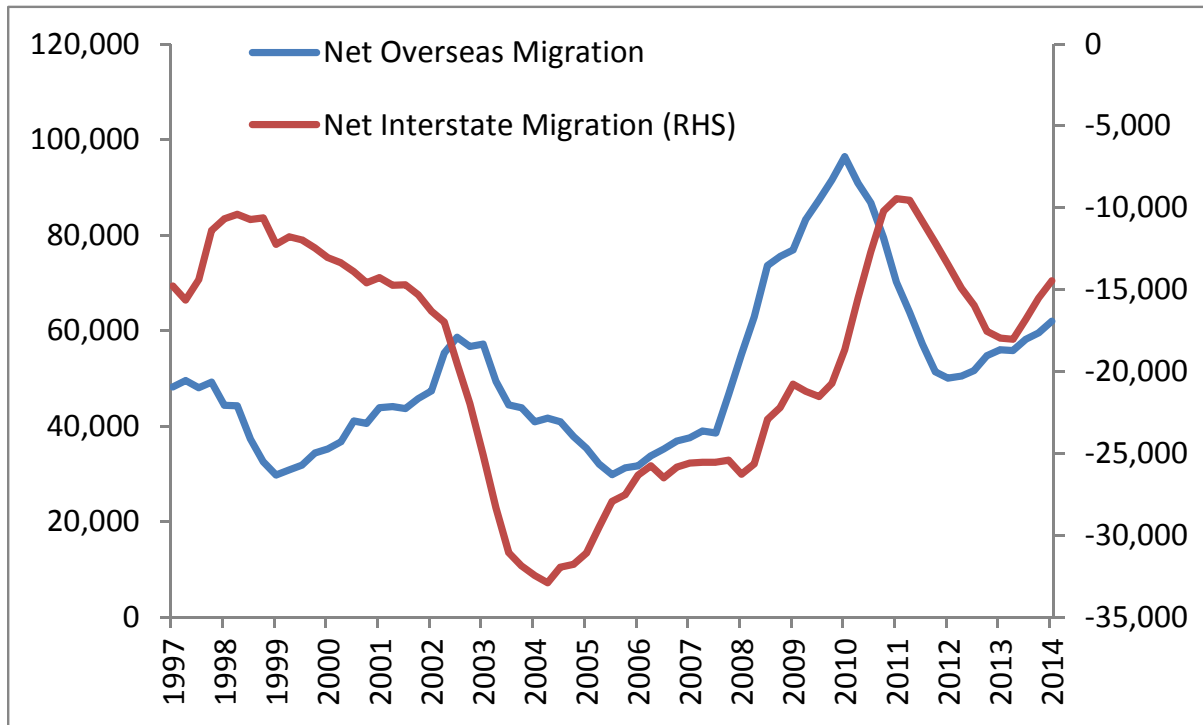
Between 1991 and 2001, the North Coast's resident population expanded by 79,312 persons, at an average rate of 1.6% per annum. This elevated rate of population growth has been underpinned by a wave of 'sea changers', who upon retirement, migrated from Sydney and other regions throughout New South Wales. Following this surge, a lower rate of population growth ensued of 0.8% per annum between 2001 and 2007.

Over the three years to 2010, population growth recovered (averaging 1.0% per annum). While an improvement on the 2001 and 2007 period, the observed rate of growth remained below that recorded in Sydney (1.7% per annum) and New South Wales (1.5% per annum). Since 2010, population growth has deteriorated, to a new low point of just 0.6% per annum over the two years to 2013.

**Figure 4.** Population Growth – North Coast, NSW and Greater Sydney (2003-2013)

Source: 3218.0 Regional Population Growth, 2012-13

The impetus behind population growth in New South Wales and Sydney has been a surge in net overseas migration. Filling in the void left by local workers exiting the labour force, skilled migrants represented a 'quick fix' solution for supplementing diminishing labour resources. For New South Wales, net overseas migration surged in 2007, before peaking in 2008 (at 96,000 persons). While the overall level has eased from this peak level, it remains high by historical standards with 59,960 per annum since Dec 2009.

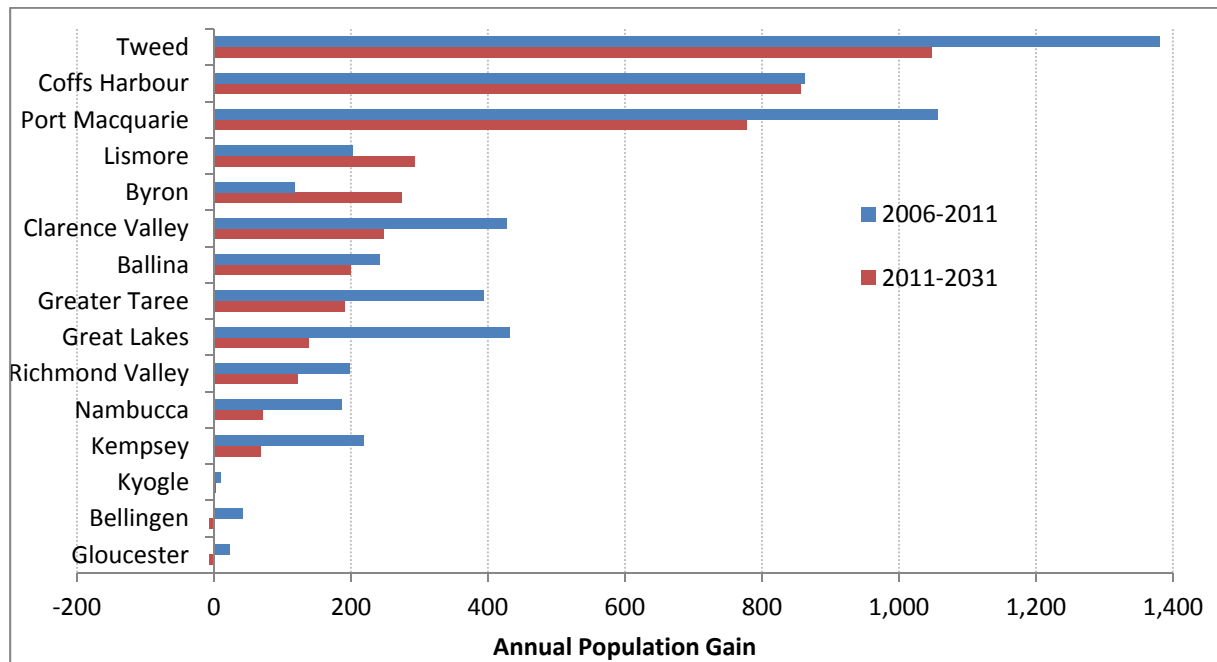
**Figure 5.** Net Migration – New South Wales (March 1996 – March 2014)

Source: 3101.0 Australian Demographic Statistics

For the North Coast region, overseas migration represented the second largest source of population growth. Over the five years to 2011, migration from this group amounted to 9,173 persons, accounting for 39% of total migration into the region (23,259 persons over this period). While high for the North Coast region, growth in overseas migration has not been on par with New South Wales and Sydney. Furthermore, the region also experienced a considerable outflow of 2,915 persons to interstate locations, predominantly Queensland.

The Department of Planning and Environment population projections indicate slower trend population growth for the North Coast. According to the recent August release, population growth in the North Coast is expected to average just 0.6% per annum between 2011 and 2031. This anticipated rate of expansion is significantly below that experienced during the 1990s, but equivalent to that observed over the three years to 2013 – which was a low-growth period. Sustained low population growth is expected to have significant repercussions on the North Coast region.



**Figure 6.** Historical and Projected Annual Population Change by LGA (2006-2011 & 2011-2031)

Source: *Census of Population and Housing (2011)*; *Department of Planning and Environment (2014)*

According to DP&E projections, the three most populated LGAs are expected to incur the majority of the region's population growth, accounting for 62% of the gain. In contrast, minor reductions are anticipated for two of the region's least populous LGAs between 2011 and 2031 – Gloucester -150 persons and Bellingen -100 persons<sup>1</sup>.

### Pronounced ageing and retention of young working adults

The North Coast's resident population is ageing. Representation amongst 65+ persons has increased from 18.4% in 2003 to 22.1% as at 2013.

Rising representation from this group has been underscored by solid growth. Over the decade to 2013, the number of 50+ persons increased on average by 2.6% per annum, and for 65+ residents, 2.7% per annum. A proportion of this increase can be attributed to net migration of senior residents into the North Coast from Sydney and other NSW locations, which totalled 4,295 persons over the five years to 2011.

<sup>1</sup> Based on 'LGA Summary' projections

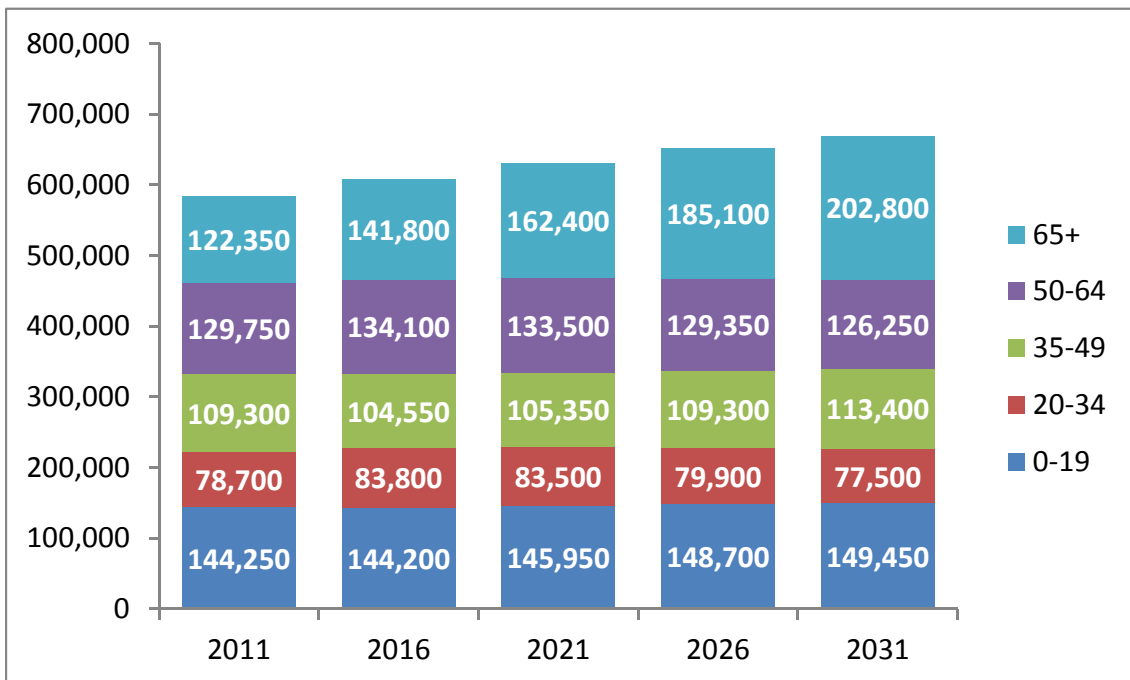
**Table 1.1**  
Population Growth by Age - North Coast (2003 - 2013)

Age Cohort	2003	2013	Annual Growth
0 -19	146.1	143.5	-0.2%
20-34	77.0	79.6	0.3%
35-49	116.1	105.6	-0.9%
50-64	103.2	131.9	2.5%
65+	99.8	130.7	2.7%
<b>Total</b>	<b>542.3</b>	<b>591.3</b>	<b>0.9%</b>

Source: 8731.0 Building Approvals, Australia

At the same time, growth in young working residents was negligible. According to ABS population statistics, the number of 20-34 year olds remained static between 2003 and 2013 – increasing by just 0.3% per annum. Low growth in this cohort is consistent with migration data, which exhibited a net outflow of young working adults to other regions (3,878 persons over the five years to 2011).

**Figure 7.** Population Growth by Age – North Coast (2011-2031)



Source: Department Planning & Environment (2014)

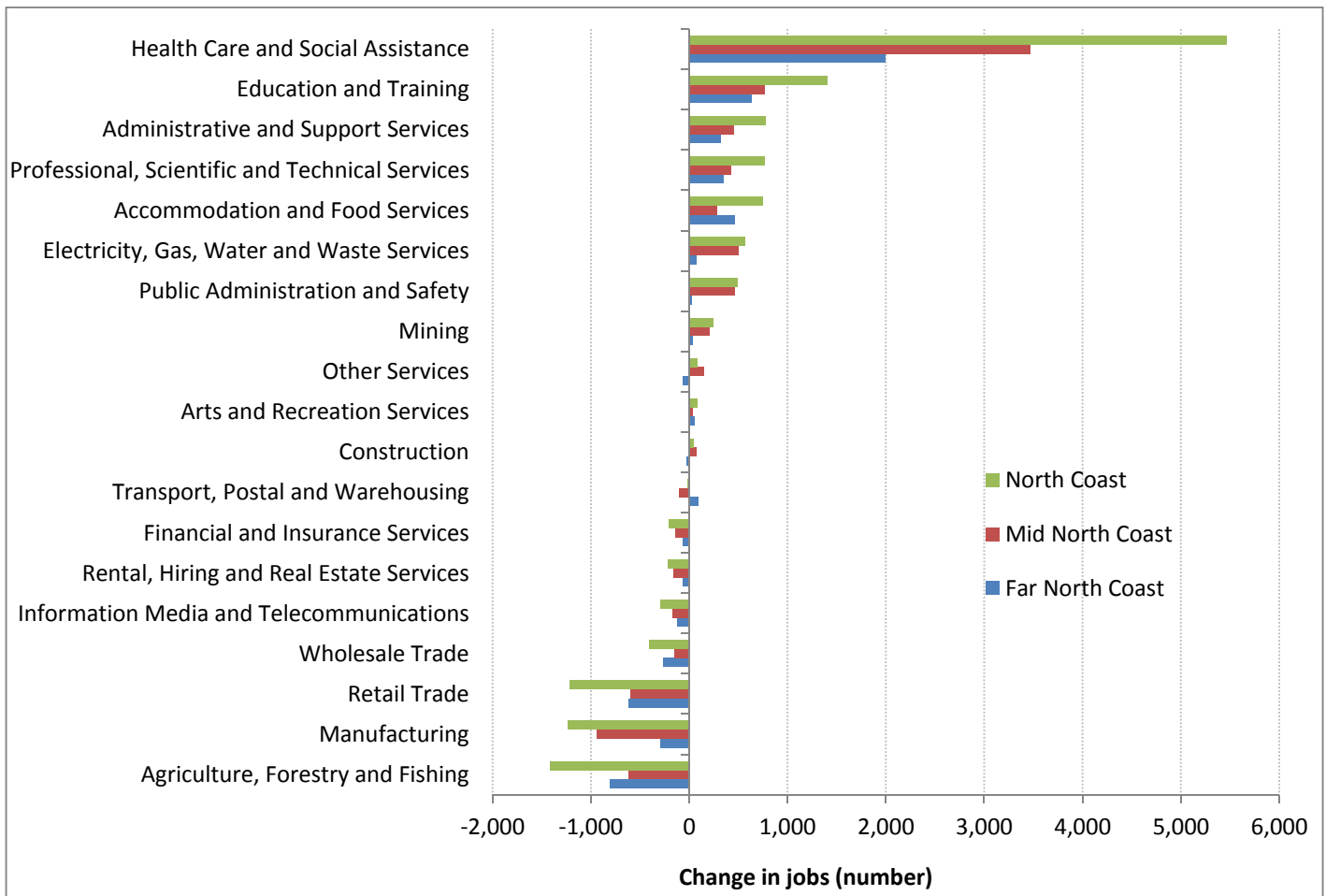
According to DP&E projections, population growth is expected to be most pronounced in the 65+ age cohort. At 2011, persons aged 65+ accounted 21% of the region's population, however by 2031, this proportion is expected to rise to 30%, taking the total population within the age cohort to approximately 202,800 (growth of 80,450 persons). Moreover, the number of 20-34 year olds is expected to drop by 1,200 persons between 2011 and 2031.

### **Direct Implications from Demographic Changes**

These concurrent demographic forces are likely to present the region with many challenges in the future, many of which centre on the region's ability to supplement the rate of retirement.

Combined with weak growth in young working adults (retention of locals or from migration), it is expected labour shortages will eventuate in the North Coast region, particularly as the rate of retirement increases (in line with DP&E projections). In the future, this may hinder the region's ability to provide services to an ageing and growing resident population.

Opportunities are also expected to present from ageing. The rapid expansion in senior citizens is expected to support growing demand for health and social services. Already the largest employing industry in the region (17%), jobs in Health Care and Social Assistance grew by an additional 5,460 jobs between 2006 and 2011.

**Figure 8.** Employment Change by Industry – North Coast region (2006-2011)

Source: Census of Population and Housing (2011)

Consistent with its employment profile, there has been solid investment in health and aged care capacity in the North Coast region. According to ABS Building Approvals data, the value of health building approvals averaged \$106.8 million over the two years to 2014 – a 420% increase on that recorded over the six years to 2012. Similarly, the value of aged care building approvals has been solid, averaging \$38.4 million per annum since 2007.

In preparation for the anticipated growth in senior citizens, there is a significant volume of health building projects currently underway, and more planned for the future. Current and planned major hospital projects in the North Coast region include:

1. Port Macquarie Base Hospital Expansion project (\$110 million)
2. Kempsey Hospital Redevelopment project (\$81 million)
3. Lismore Base Hospital Redevelopment project (\$80 million)

4. The new Byron Central Hospital project (\$80 million)
5. Greater Taree Base Hospital Redevelopment project (\$26 million)
6. A new multi-purpose medical and allied health clinical education centre in Taree LGA (located within the grounds of the Manning Base Hospital)
7. Redevelopment of the Casino and District Memorial Hospital (redeveloped emergency department and four new treatment bays and two resuscitation bays).

An ageing population will continue to support demand for health services at traditional health facilities such as hospitals, as well as at other facilities such as aged care villages and private residential dwellings (through home care services). The ability of this industry to facilitate rapid employment growth in the wake of the GFC demonstrates its resilience to adverse economic settings – empirically, demand for health services is immune from cyclical fluctuations. Significant growth is expected in the future.

**Table 1.2**  
Average Annual Health Building Approvals by LGA (\$m) - 2007-2014

LGA	2007 - 2012 Annual Average	2013 - 2014 Annual Average
Port Macquarie - Hastings	3.1	43.4
Lismore	5.4	26.6
Kempsey	0.2	22.8
Greater Taree	1.4	5.1
Coffs Harbour	8.4	2.7
Tweed	1.0	2.2
Clarence Valley	4.5	2.0
Nambucca	0.1	0.6
Byron	0.1	0.4
Gloucester	0.0	0.4
Kyogle	0.2	0.3
Richmond Valley	0.1	0.2
Ballinga	0.3	0.1
Great Lakes	0.3	0.0
Bellingen	0.2	0.0
<b>North Coast</b>	<b>25.4</b>	<b>106.8</b>

Source: 8731.0 Building Approvals, Australia

## Industry Outlook

### Traditional Industries

Structural change is apparent in the North Coast. In line with national trends, traditional labour intensive industries such as Manufacturing and Agriculture, Forestry and Fishing are making way for higher-order service and professional industries (Health Care and Social Assistance etc.). Employing approximately 11.5% of the region's workforce, job losses in these industries have been significant –2,627 jobs were shed over the five years to 2011. This contraction has been underpinned by a historically high Australian dollar, subdued demand and increased international competition.

Looking forward, the decline in Manufacturing's share of total employment is set to continue. Similarly, the long term outlook for the Agriculture, Forestry and Fishing industry is expected to be weak, due to continued consolidation in the industry. While growth has been registered in some LGAs (e.g. manufacturing jobs increased in Kyogle, Richmond Valley and Nambucca LGAs), broader market forces (e.g. international competition and consolidation) are expected to present significant challenges for these industries in the future.

For the Construction industry, weak residential building activity has hindered employment growth with just 42 jobs created over the period. In the absence of the Pacific Highway upgrades, MacroPlan Dimasi expects outright job losses would have eventuated.

In the absence of new infrastructure projects and sustained non-residential construction (particularly in health), the outlook for the construction industry is uncertain. While housing and demographic fundamentals all point to a property market upturn, significant service and infrastructure costs are expected to limit the scope of a recovery.

However, on the balance, residential construction in the North Coast region is expected to be underscored by an ageing population and inflows of retiree households from other locations. When combined with continued investment in non-residential buildings (e.g. health, industrial, education airports, retail and commercial) it is expected there will be jobs created in the construction sector.

## Tourism

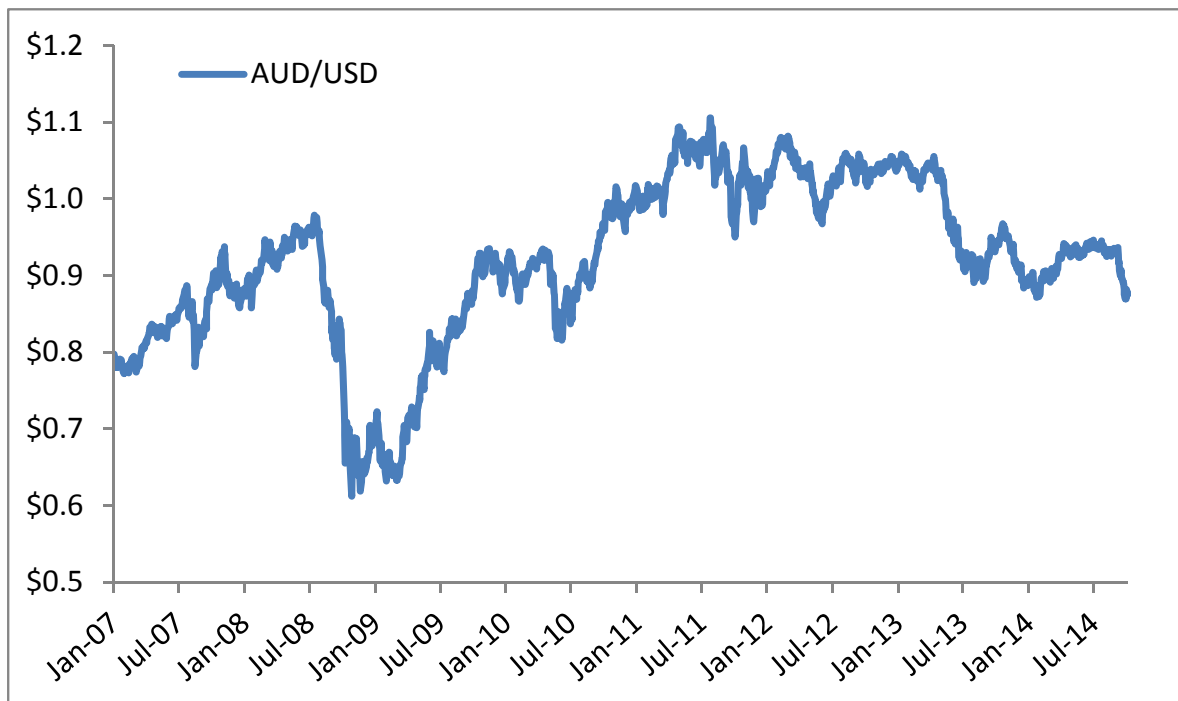
Tourism, along with other trade-exposed sectors such as Manufacturing and Agriculture, is prone to broader market forces and changes in consumer expectations.

As noted previously, the importance of tourism to the North Coast local economy is significant. As at 2011, 26% of all jobs in the region were within designated tourism industries such as Accommodation and Food Service, Retail Trade and Arts and Recreation Services.

Since a low point of \$0.60 against the US Dollar in November 2008, the Australian dollar has appreciated significantly, where in May 2011 it reached US\$1.10 - its highest point since the dollar was floated in 1983.

From an international perspective, the high Australian dollar has impacted the local tourism sector – a high dollar reduces the relative ‘attractiveness’ of Australia as a destination. While visitation from international tourists did improve since 2012 (5% over the 12 month period), growth could have been much greater if the Australian dollar had been lower.

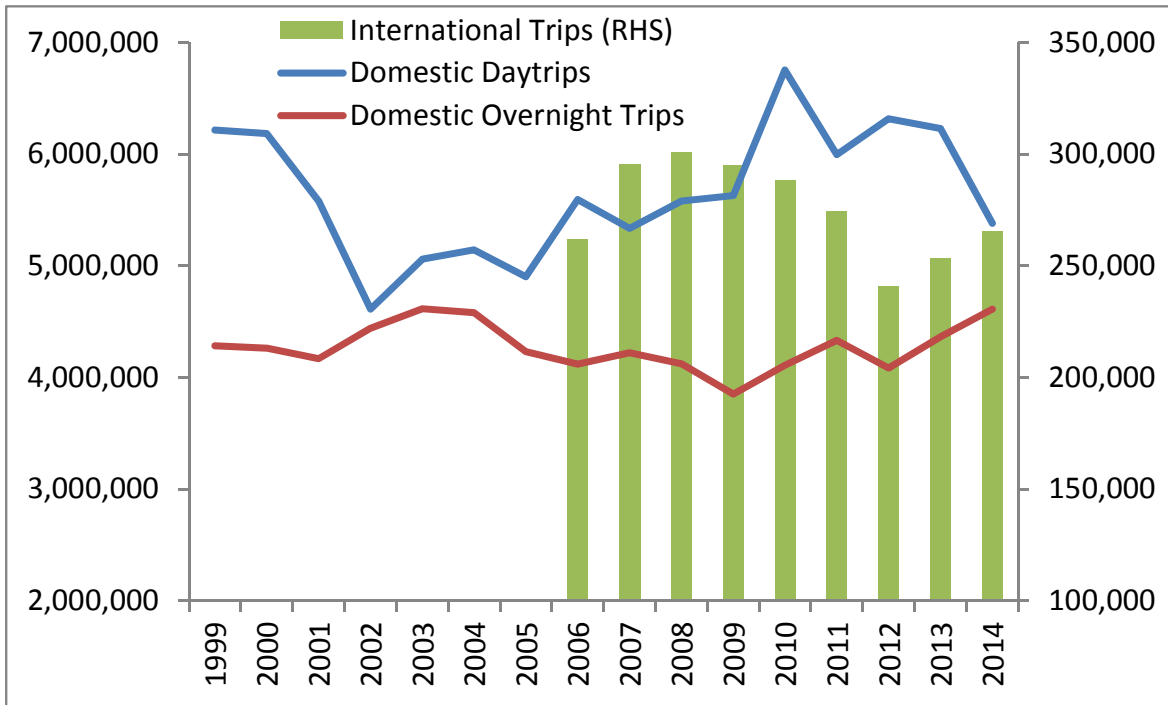
**Figure 9.** AUD/USD Spot Rate (January 2007- September 2014)



Source: RBA, MacroPlan Dimasi

Moreover, a higher dollar increased the purchasing power of Australians travelling abroad. This environment coupled with airfare discounting amongst international carriers resulted in a large volume of Australians leaving the country for holidays.

**Figure 10.** Domestic and International Trips (1999–2014)



Source: Tourism Research Australia

Unlike other dominant tourist destinations such as Queensland’s Sunshine Coast and Gold Coast, domestic tourist numbers within the NC have fared a little better as a decline in domestic daytrips has coincided with an improvement in domestic overnight trips. Nevertheless, domestic tourism numbers have weakened over the past 12 months, in the order of -6%. Moreover, over the 12 months to June 2014, the number of domestic daytrips to the region totalled 5.38 million which represents a decline of 14% over the 12 months previous.

To a degree, this has resulted in job losses in the region’s second largest employing industry (retail trade), amounting to 1,213 jobs over the five years to 2011. While some of this could be attributed to subdued local consumer confidence (due to the GFC), weak growth in tourist volumes did not augur well for this industry.

More recently, the Australian dollar has depreciated (down to around 0.80 AUD per USD as at December 2014), and is on course to drop further by the end of 2015 (to 0.70–0.75 AUD). Given that the international segment has been less responsive than the



domestic sector, a depreciating Australian dollar will surely result in greater overall patronage to the North Coast. This is reflected in planned airport and tourism related upgrades in the North Coast region, including the Ballina-Byron Gateway Airport and the Grafton Regional Airport expansion projects, and the beach replenishment and upgrade of the Kingscliff Beach Holiday Park.

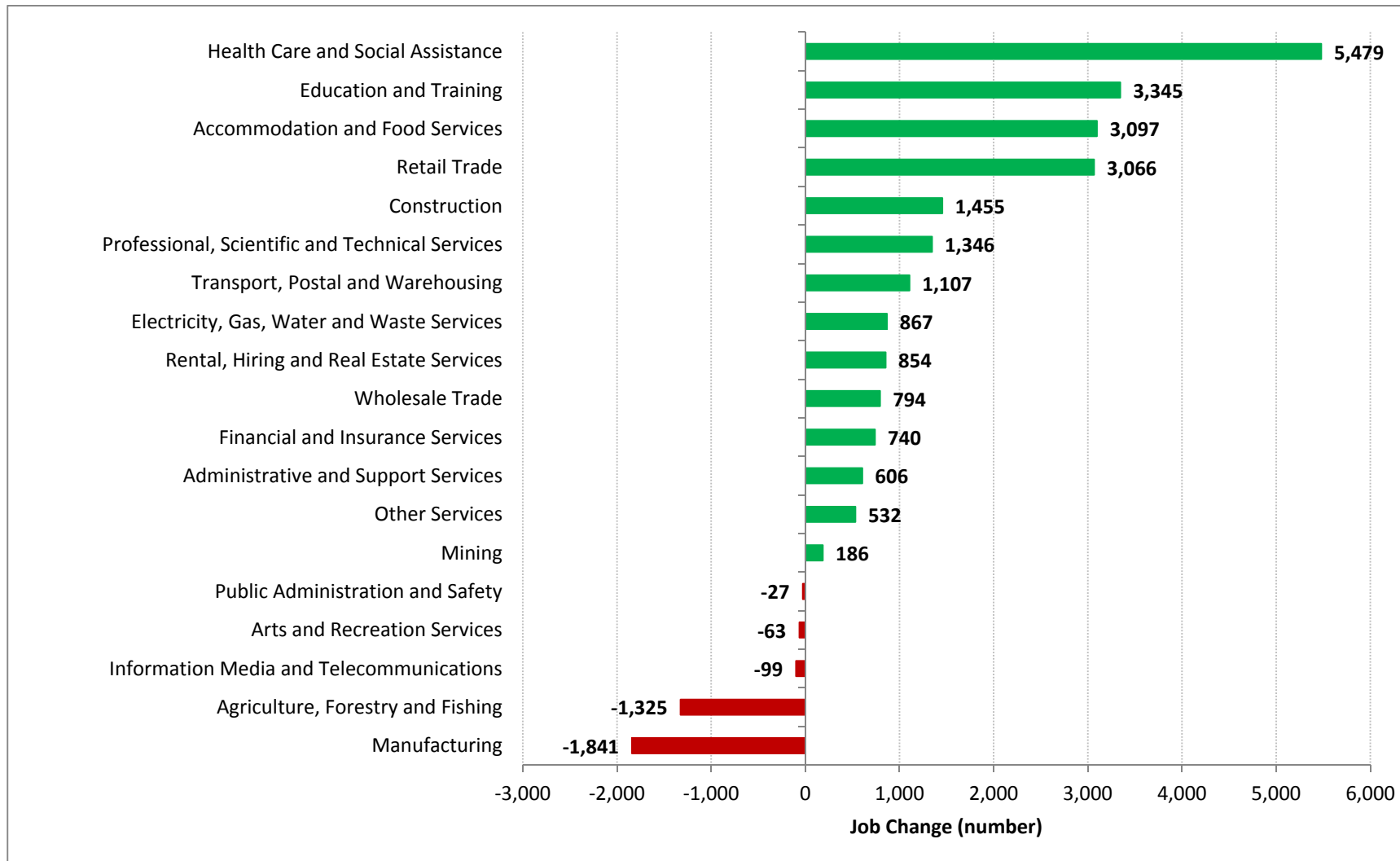
## Employment Projections

MacroPlan Dimasi employment projections consider anticipated demographic and labour market drivers, as well as the ability of industry to generate employment in the North Coast region. Employment change by industry for the North Coast region is presented in the next chart.

These projections are characterised by:

1. An expected expansion in the North Coast regions' workforce with 930-940 additional jobs per annum between 2011 and 2031.
2. Sustained growth in service-orientated industries, attending to the needs of residents and visitors
3. Pronounced growth in the Health Care and Social Assistance, Education and Training, Retail Trade and Accommodation and Food Services.
4. Continued job losses in traditional industries such as Agriculture, Forestry and Fishing and Manufacturing – albeit at a slower pace relative to the 2006-2011 period

**Figure 11.** Employment Change by Industry, North Coast (2011-2031)



Source: MacroPlan Dimasi (2014)

## Employment Land Need and Capacity

To accommodate employment growth, it is anticipated current commercial, industrial and special use capacity will need to be increased. Overall, MacroPlan Dimasi estimates that employment and economic growth in the North Coast region will require an additional (as a minimum) 77 hectares of business, 67 hectares of industrial and 35.1 hectares of special use floorspace over the forecast period (to 2031).

<b>Land Use zone</b>	<b>Floorspace Demand (hectares)</b>	<b>Land Required (hectares)</b>
Business*	77.0	104.4
Industrial	67.0	101.2
Special Uses	35.1	37.9

*\*Business includes retail and commercial*  
*Source: MacroPlan Dimasi*

Having regard for observed and average floorspace ratios throughout the North Coast region, it is estimated approximately 104.4 hectares of business, 101.2 hectares of industrial and 37.9 hectares of special uses of zoned land will be required to accommodate employment growth over the forecast period to 2031.

Overall, at a regional level there is sufficient zoned employment land to fulfil the future employment needs of the North Coast region. As at 2031, it is estimated:

- Supply of business land will exceed demand by 358.2 hectares
- Supply of industrial land will exceed demand by 2,519.1 hectares
- Supply of special uses land will exceed demand by 1024.7 hectares

**Table 1.4**  
Employment Land Gap Assessment, North Coast region (2011-2031)

Land Use	Demand (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Surplus (Deficit)
Business*	104.4	442.0	20.6	462.6	358.2
Industrial	101.2	991.4	1,628.9	2,620.3	2,519.1
Special Uses	37.9	1,054.9	7.7	1,062.6	1,024.7

\*Business includes retail and commercial  
Source: MacroPlan Dimasi (2014)

However, local environmental constraints, difficulties associated with redeveloping existing urban lands and the cost of delivering services (i.e. utilities, roads and upgrades) could reduce the scope of land available for future development, meaning more land may be required.

Moreover, a development outcome requires a 'locational' union between supply and demand. As such the location of zoned land may not be appropriate or consistent with market requirements or the needs of new and emerging businesses, which may also require additional land above current estimates be made available.

Notably, there are specific exceptions to this broader 'regional' outcome for business zoned (and future) land, including the LGAs of Byron, Tweed, Bellingen and Richmond Valley.

To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land. Moreover, greater utilisation of existing B4 Mixed Use land is another plausible solution, which in general is largely underdeveloped in the North Coast region.

Notably, it is estimated a deficiency of special use zoned land will materialise in two LGAs – Kyogle and Richmond Valley. It is believed some demand for health services (and hence employment) will be accommodated in commercial/retail premises, as well as at aged care facilities and private residential dwellings (i.e. home care)

While there is an adequate stock of industrial zoned land, MacroPlan Dimasi anticipates the majority of development in this category will occur at existing industrial parks – either through redevelopment or extension of existing industrial

parks. Latent land from a receding manufacturing industry is expected to rise, and could potentially be absorbed by growing industrial sectors such as transport, logistics and warehousing (through redevelopment).

## Conclusion

Over the next 20 years, the greatest influence on the region will stem from its aged population, from a labour supply perspective. Coupled with weak growth amongst young working adults, the region's ability to provide required services will be tested.

However, an ageing population, improved consumer confidence, a lower Australian dollar and greater visitation are expected to deliver benefits to the North Coast region. In summary, key growth opportunities include:

- Retirement and aged care services – ageing within the local population and in traditional regions in NSW (e.g. Sydney) is expected to underscore demand for retirement and aged care product in the North Coast.
- In line with the region's evolving demographic forces (i.e. ageing), demand for health services is expected to increase significantly. This situation will be particularly true for Healthcare and Social Assistance, both in terms of patient demand and qualified healthcare workers. In essence, this is expected to present employment opportunities, and in effect stymie the outflow of young working residents from the region.
- Tourism services (Accommodation and Food Services, Retail Trade etc.) – as the Australian dollar depreciates and competition amongst international carriers subsides, the volume of domestic visitors to the North Coast is expected to increase significantly (at the expense of overseas travel). The flow-on benefits are expected to be widespread, creating part-time and full-time jobs across a range of industries.
- Industry diversification and more employment opportunities will help retain young workers in the region, as well as entice others who currently live in other locations, which will in turn support population driven industries such as Education and Training and Retail Trade.

- Transport, logistics and warehousing – When combined with sustained reliance on imports, the Pacific Highway upgrades will provide opportunities for transport, logistics and warehousing operators and spur investment in industrial premises (e.g. Northern Gateway Transport Hub).

On the other hand, the outlook for traditional industries is unfavourable, with further contractions anticipated in the Manufacturing and Agriculture, Forestry and Fishing industries. Even with a depreciating dollar, competition from international producers (due to lower labour and operating costs) is expected to undermine production in the North Coast. There are however, some exceptions to this, with some LGAs such as Kyogle, which is anticipated to benefit from specialised manufacturing activities.

In the absence of new infrastructure projects and sustained non-residential construction activity (particularly health related), the outlook for the construction industry is uncertain. While housing and demographic fundamentals all point to a property market recovery, significant service and infrastructure impediments are expected to limit the scope of the recovery.

However, on the balance, an ageing population and a sustained inflow of retirees are expected to support residential construction activity in the North Coast region. When combined with continued investment in non-residential buildings (e.g. health, industrial, education airports, retail and commercial) it is expected employment growth will be realised in this sector.

## Section 2: Retail Overview

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We have provided an overview of the broad retail trends across Australia as they are relevant to the retail environment in both metropolitan cities and regional areas like the New South Wales North Coast, and we have then discussed the implications of these trends for the North Coast more specifically.

The retail sector throughout Australia generally enjoyed an extended period of strong and steady growth for some 15 years leading up to the global financial crisis (GFC) in 2008. Following the GFC, retailing throughout Australia remained strong in 2009, underpinned by federal government stimulus spending, including handouts to families, designed specifically to support the retail sector.

However, retail sales were then very weak for the 2-year period 2009 – 2011, as the realities of the GFC started to impact on the Australian economy and Australian consumers, particularly paying back excessive credit levels which had been run up in the pre-GFC period. Nonetheless, overall, the impacts on the Australian retail sector from the GFC were relatively benign compared with other western economies, many of which saw reductions of 10% or more in their respective retail sectors. By contrast, within Australia the worst outcome was a reduction in growth rates in the retail sector, from pre-GFC levels of 4% – 6% annually to post-GFC levels of 1% – 3%.

Generally, retail sales in Australia are steadily gathering momentum, with recent trends (past 2 years) showing steady year on year increases. These increases have been mainly underpinned by sound population growth generally across Australia; recovery in the housing market; slowly improving consumer confidence; and a very low interest rate environment by Australian standards.

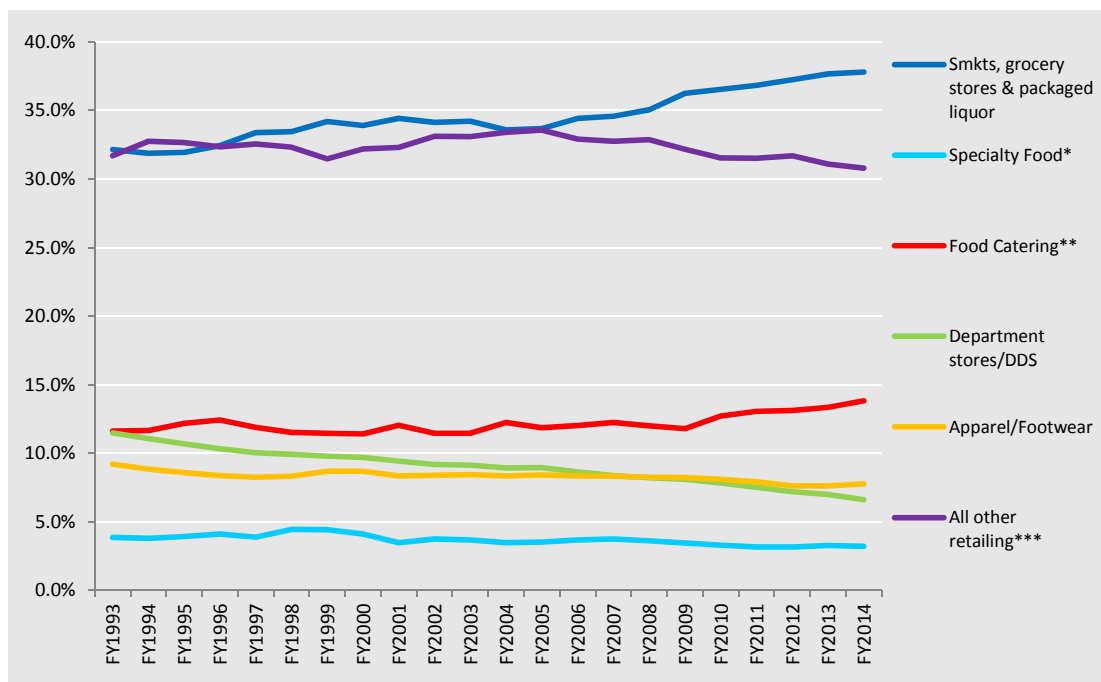
### 2.2.1 Retail sales by category

Across the major retail categories, department stores and discount department stores continue to experience a tough trading environment, as they cater for the more discretionary spending market, which has suffered since the GFC. Food

retailing, comprising fresh food (e.g. groceries) and food catering (restaurants, cafés, take-away food outlets), on the other hand, continues to perform strongly, underpinning a paradigm shift in consumer attitudes towards eating out.

Supermarkets and food specialty sales have been growing strongly, despite some deflation in food and grocery prices. However, non-food specialty sales are not performing as strongly, as discretionary spending continues to be impacted from depressed customer sentiment, which has recently been further negatively impacted following the release of the federal budget. Chart 2.1 below shows the readily evident post-GFC trends in retail expenditure behaviour throughout Australia, highlighting the growth in supermarkets and grocery stores as well as food catering, as well as the significant declines in non-food retailing generally, but particularly in department stores/discount department stores.

**Chart 2.1**  
ABS Retail Trade, Total Australia (FY1993 - FY2014), % of total



\*Specialty food includes fresh meat, fish and poultry, fruit and vegetables, and other specialty food retailers not captured by the above categories.

\*\*Food Catering includes take-away food, cafes and restaurants.

\*\*\* All other retailing includes furniture/floor coverings, electrical/electronics, hardware /garden, newspapers/books, other recreational goods, pharmaceuticals and other retailing n.e.c.

Source: ABS Retail Trade Cat.8501.0, Aug 2013



International retailers continue to show very strong interest in entering Australia, evidenced by the recent opening of 'fast fashion' global retailers Uniqlo and H&M in the Melbourne CBD, joining the previously arrived Zara and Topshop. Though not all global retailers are expected to succeed, their entry is reshaping the shopping centre landscape, putting some downward pressure on rental levels, as they are seen as 'must-haves' and have a strong bargaining position.

Most new international retailers have, and will continue to enter the Australian market in the major capital cities, starting generally with flagship stores in the CBD's of these cities (if sites are available) and then expanding their footprints at the larger/more successful department store anchored shopping centres in the suburbs. While this is not directly relevant for shopping centres/retail strips in the North Coast region of NSW, the indirect impacts would be that residents seeking out these retailers will travel to do so and spend money beyond the region, for example at Robina Town Centre or Pacific Fair on the Gold Coast, or in Brisbane or Sydney.

As part of the fallout of the post-GFC trends, Australian department stores and, even more so, discount department stores have reported generally poor results, particularly Target and Big W. Over the past two years, Target has reported same store sales declines of 3.3% in 2013 and 5.3% in 2014. Big W has reported same store sales declines of 0.7% and 3.1% over the same period.

One of the repercussions of these trends has been a greatly reduced level of interest in new store locations by discount department store operators, other than Kmart which continues to trade solidly (though not spectacularly) and is still looking to open at least some new stores in sub-regional type locations. By contrast, both Big W and Target are now much more focused on locating at the larger and/or strongest department store based centres, and are generally less inclined to consider locations at metropolitan discount department store based centres or in provincial cities – locations which those chains were aggressively seeking in the pre-GFC period.

Online retailing has combined with dampened expenditure on discretionary retailing generally to place some significant pressures on some retail categories

over the past 3 – 4 years. At present online retailing accounts for almost 6% of total retail sales in Australia, and has been growing at rates between 15% – 20% annually over the past few years. However, the rate of growth has now started to decrease (down from 20+% to around 7% over recent months) and many retail categories have not been particularly impacted.

The combination of factors which has led to a rapid deceleration in the rate of growth of online retail purchasing by Australian consumers has included the following:

- A much weaker Australian dollar in recent times, which is expected to stabilise around 0.7 – 0.8 USD, closer to its long run average.
- Improved competitiveness, and pricing, of bricks and mortar retailers, which have also significantly improved their online offers, thereby helping to reduce the attractiveness of online retailing relative to bricks and mortar retailing.
- Increasing bricks and mortar presence of international retailers within Australia which previously were only available via the online channel to Australian consumers.
- The general shift to more food purchasing (both take-home food and in particular take-away food and cafés/restaurants) which in Australia enjoys only minimal online penetration.

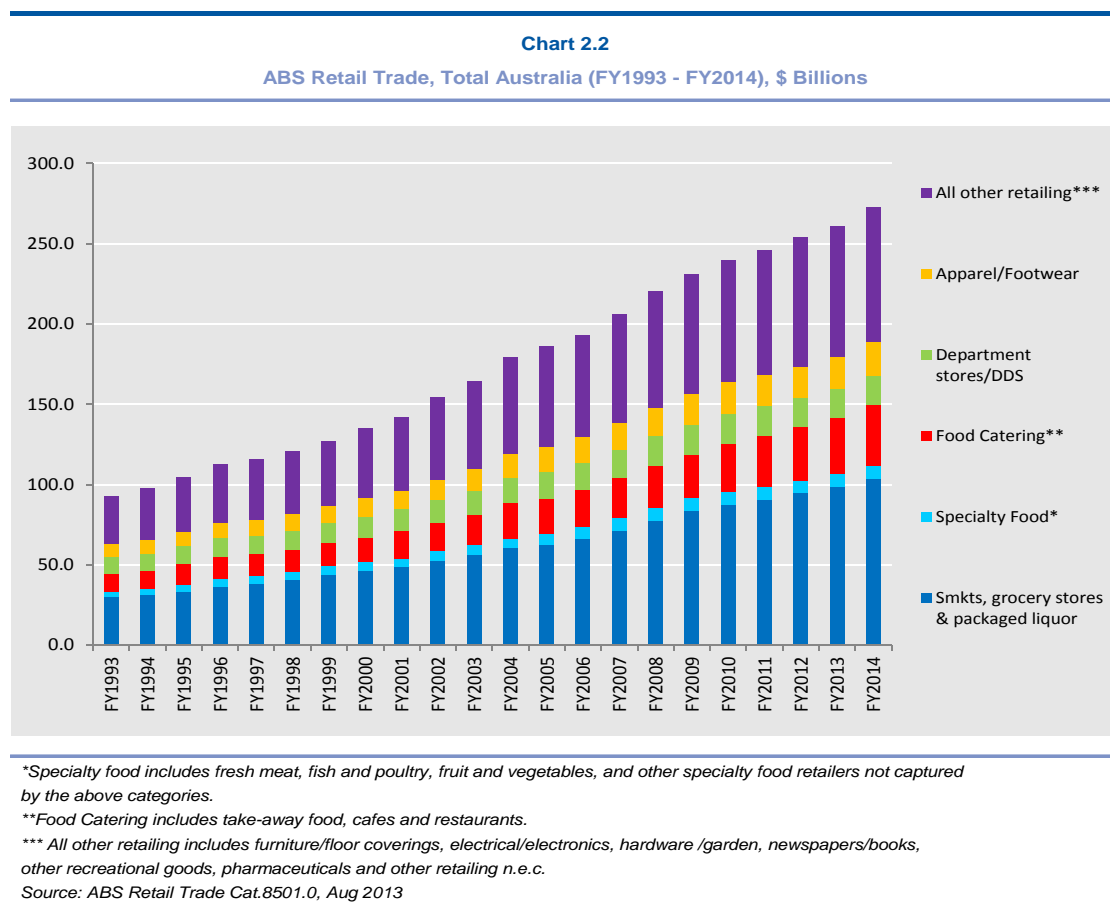
The extensive physical improvements of major shopping centres now underway throughout Australia – a trend which is generally more relevant to major metropolitan areas rather than regions such as the North Coast region of New South Wales – is yet another factor which in the future will improve the attractiveness of bricks and mortar retailing relative to online. However, centres on the North Coast will need to remain relevant to their trade areas and refresh/refurbish where necessary (e.g. Coffs Central in Coffs Harbour) to ensure they minimise the impacts from online retailing.

One of the interesting implications of the increasing volume of online retail sales is the increased demand for industrial warehousing space for storage and

distribution, which is playing out in increased demand for industrial land in appropriate locations.

Clearly, food catering (cafes, restaurants and take-away food outlets) are quite immune to the online retailing trend, and that category has continued to grow very strongly, including in the post-GFC period. Similarly, take-home food retailing (food and groceries purchased at supermarkets, specialty stores, fresh food markets) is relatively immune to online retailing, with Australians having shown relatively limited interest in purchasing their food and groceries online. Again, the take-home food category has continued to grow strongly, even in the post-GFC period, as previously noted.

Chart 2.2 shows the shifts in relative contribution to total retail sales in Australia over the past two decades.



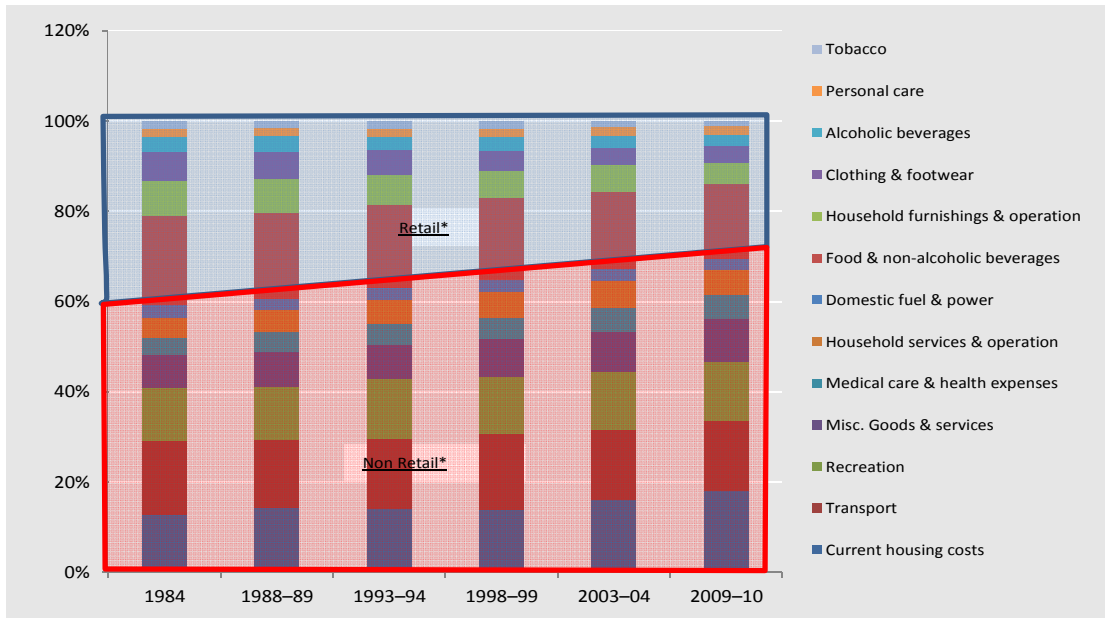
Real growth in retail sales has also been negatively impacted in the post-GFC period by a range of economic and social factors. Firstly, there has been an increased rollout of cheaper goods, particularly by mainstream retailers. For example, Kmart is increasingly sourcing directly from overseas suppliers and driving down prices in the discount department store sector. Shoppers are also increasingly using the internet to purchase retail goods, with lower prices being one of the most important considerations.

The downward pressure on the price of retail goods is not only contained to non-food items, with fresh food also experiencing price deflation over recent years. However, this has not been an outcome of the GFC, and has been primarily led by large retailers, most notably by Wesfarmers (Coles supermarkets). The ongoing downward pressure on price has particularly hit some independent traders, who are unable to compete on price as easily as major retailers.

The general outlook for Australian retailing is cautiously optimistic. Although some centres/precincts, catering for the more discretionary spending market, are likely to face increased external pressures (from online retailing, emergence of new formats/retailers).

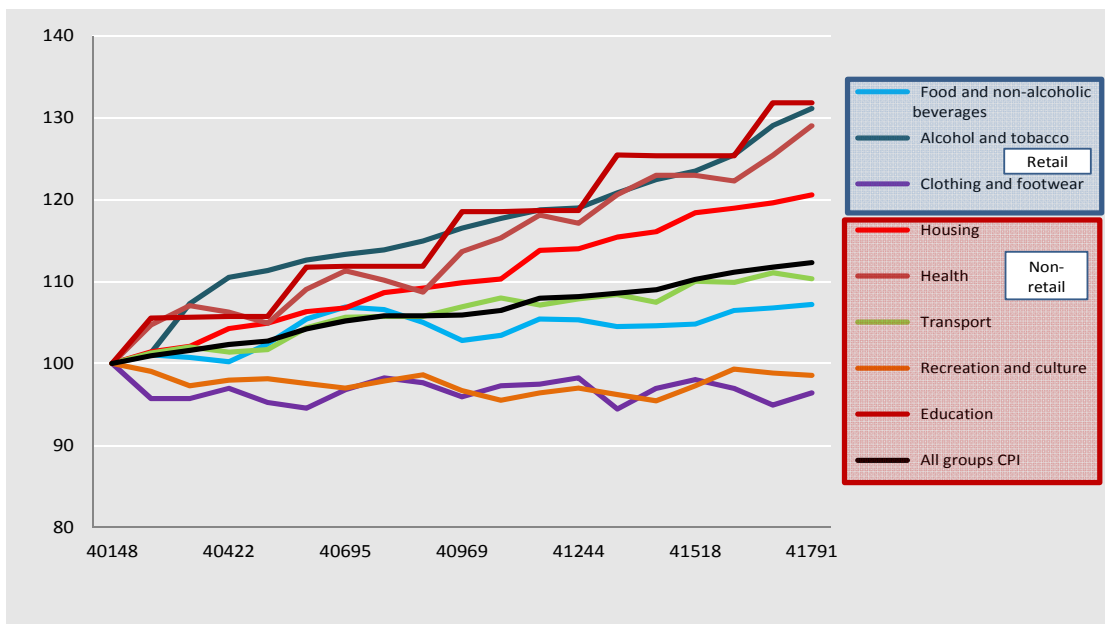
Shopping centres have also increasingly been looking to have a wider range of non-retail uses/services to support the retail offer, in line with the changing expenditure behaviours of Australian households. Charts 2.3 and 2.4 following highlights the pressures on Australian households in relation to the more essential non-retail requirements of the household budget – housing, transport, education and health. Rising costs for these services have resulted in an ever increasing share of the household budget being devoted to non-retail uses, as shown in the chart.

**Chart 2.3**  
Average Weekly Household Expenditure



\*NB: Approx 35% of recreation is retail, 20% misc. Goods & services is retail; 23% of household services is retail and 37% of alcoholic beverages is 'non-retail'  
Source: ABS Household Expenditure Survey

**Chart 2.4**  
CPI - Selected Groups (Dec 2009 to Jun 2014)



Source: Consumer Price Index

### 2.2.2 Implications for future retail centre development

The numerous retail developments which have occurred across the municipalities of Far North Coast and the Mid North Coast of New South Wales over the past 15 years are typical of the retail development patterns witnessed generally across Australia over that period. Some examples of the developments completed over this period include the following:

- Expansions of the largest shopping centres provided throughout the region, typically adding discount department stores, supermarkets, and a range of specialty stores, many of which have been national brand stores. Centres which have undergone expansions/developments of this nature include the following:
  - Park Beach Plaza at Coffs Harbour
  - Port Central in the Port Macquarie Town Centre
  - Lismore Square
  - Grafton Shoppingworld
  - Stockland Forster
  - Manning Mall at Taree
  - Ballina Fair
  - Ballina Central
  - Centro Toormina
- Delivery of an increasing number of supermarket developments, via a combination of new neighbourhood centres built on greenfield/brownfield sites, as well as redevelopments of existing stores or vacant sites within town centres, with around 40 new supermarkets added across the total region over the past decade. The following is a list of examples of this type of development:
  - New Woolworths supermarkets at Macksville, Mullumbimby, Goonellabah, Tuncurry, Cabarita Beach and Gloucester.

- New Coles supermarkets at Casino, Grafton South, South West Rocks, Ocean Shores, Coffs Harbour Town Centre, Port Macquarie Town Centre, Kempsey, Grafton and Lake Innes.
- New Aldi stores at Toormina, Kempsey, Byron Bay, Port Macquarie, Taree, Casino, Lismore, Forster, Grafton, Coffs Harbour, Ballina and Tweed Heads.
- Large footprint new store entrants, typically built in homemaker centres or as freestanding locations, the most obvious example being the new Masters hardware superstore being rolled out by Woolworths. That in turn has elicited a competitive response by Wesfarmers' Bunnings Hardware format that has resulted in new Bunnings stores being built at locations which were previously not being considered, as well as existing Bunnings stores being significantly expanded.
- New homemaker centre developments, primarily in the pre-GFC period, though not so much post-GFC, which substantially increased the provision of retail floorspace within the major towns, although that space was generally low turnover space and not built within existing centres. Examples of this type of development include the following:
  - Harvey Norman Centre Tweed Heads
  - Park Beach Homebase
  - Spotlight Centre Port Macquarie

One of the most significant implications of the recent trends in the Australian retail landscape, particularly the arrival of new international retailers, is that the big centres are getting and will continue to get bigger, while the more 'in between' centres have been harder hit and are likely to continue to be harder hit.

Large/successful department store based centres are the natural homes for the new global retailers, which command very large trade areas, and generate enormous sales volumes. Those retailers are simply not interested in locating in lower order centres.

The attraction of the new global retailers to department store anchored centres then has a snowball effect, making those centres even more popular destinations, both for consumers and for the supporting range of specialty retailers, who wish to be located at the best centres where the customers interested in undertaking comparison shopping are visiting.

The cycle described above then continues to make life more difficult for the lower order centres, which in the past have been largely dependent on discount department stores as their primary non-food shopping anchors.

These trends are more pertinent to the major metropolitan areas, in particular the state capital cities, where super regional and regional shopping centres are available – such as Westfield Bondi Junction, Macquarie Centre, Westfield Chatswood, Chatswood Chase, Castle Towers and the like in Sydney, as well as Canberra Centre, Westfield Belconnen and Westfield Woden in Canberra, or Charlestown Square and Westfield Kotara in Newcastle.

In regional cities and towns of the New South Wales North Coast, the issue is not so much that department store anchored centres are getting bigger, since centres of that type generally do not exist. Rather, the more important issue is that additions of new non-food anchor stores (e.g. discount department stores) or expansions to existing centres based on additional non-food anchor stores are considerably less likely to occur in the foreseeable future than they were in the pre-GFC period. This reduced likelihood of further expansions/additions of such facilities is not so much a result of the GFC, but rather the result of the changing retail landscape within Australia, which in part has been driven by the events of the GFC, but certainly not in total.

The trends in the food categories remain strong, and apply to all areas, i.e. major metropolitan areas, provincial cities and towns, and even rural areas. Subject to appropriate threshold population levels being achieved (with a full scale national chain supermarkets typically requiring a population threshold of around 7,000 – 8,000 people to be viable) the rollout of the new supermarket based developments will continue. However, even for supermarkets the rate at which new additions will occur is likely to be considerably slower than has been the case



over the past decade, primarily because many of the existing gaps have been progressively filled. Aldi, for example, has now opened stores at most of the cities and towns across the region, having added around 12 stores over the past decade, so the rate at which new Aldi stores will be added over the next decade is expected to be considerably slower.

In addition, we can expect to see an increased focus on catered food (take-away food, cafés & restaurants) as an important driver of new retail development – the recent refurbishment of The Palms in Coffs Harbour (now Coffs Central) and the proposed expansion of Tweed City being a good example of these influences.

Overall, the future growth of the various retail centres across the Far North Coast and Mid North Coast, be they enclosed, managed malls, town centres or village centres, will be generally more limited and more difficult to deliver than was the case in the 10 – 15 years pre-GFC.

Reflecting the changing priorities of the household budget, shopping centre developments in Australia are now also increasingly looking to incorporate uses such as medical (sophisticated medical centres which contain general practitioners, dental, physiotherapy, massage, and other related uses), gymnasiums, spas, and a wider range of non-retail uses.

Shopping centres/retail strips across the New South Wales North Coast are therefore more likely to be fine-tuned, with generally lower expansion demand than was available in the pre-GFC period – at least in terms of retail uses – over the next decade

## Section 3: LGA Analysis - Tweed

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Tweed LGA, with the study period being 2011 to 2031.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within the Tweed LGA i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Tweed LGA, the following tasks have been performed:

1. Quantify existing and proposed supply of employment land (zoned)
2. Derive employment projections (by industry)
3. Quantify demand for employment floorspace and land
4. Market gap assessment

The information used in this report has been informed by various local and regional planning policies, Australian Bureau of Statistics data, desktop research, DP&E population projections, DP&E land zone and floorspace ratios (FSR), previous studies as well as feedback from DP&E and Tweed Shire Council.

### 3.1 Key facts, findings and take-outs

#### 3.1.1 Population growth

- The Tweed LGA has experienced significant population growth, expanding by 6,906 persons over the five years to 2011 (at an average rate of 1.6% per annum).
- All age groups experienced some growth, most pronounced in older age groups (50 and above).

- Between 2006 and 2011, Tweed LGA incurred positive net migration (5,624 persons), proving to be a popular destination for overseas immigrants and Sydneysiders.
- DPE projections suggest population growth will remain solid (average growth of 1.1% per annum).
- In the future, the number of 65+ persons is anticipated to increase significantly, outpacing working age cohorts.

### **3.1.2 Employment trends**

- As at 2011, Tweed LGA supported 23,175 jobs (comprising 12.8% of the North Coast workforce).
- The industry profile is skewed to service and tourism related industries.
- At 57%, job containment in the LGA is low; there is a large outflow of working residents to QLD (approximately 25%).
- Between 2006 and 2011, it is estimated 896 additional jobs were created.
- Jobs growth was most pronounced in Health Care and Social Assistance (+933 jobs) and Education and Training (+244 jobs). Conversely, jobs losses were observed in eleven industries.

### **3.1.3 Employment land**

- There are 730.2 hectares of land zoned for employment purposes in Tweed LGA – comprising of 31% Business, 35% Industrial and 34% Special Uses.
- A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises.
- Following 896 new job additions over the five years to 2011, the Tweed LGA workforce is expected to expand by an additional 3,876 jobs over the forecast period (i.e. 2011 to 2031).

- A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises. As such, our demand projections indicate **60,010–80,050 sq.m of commercial, 72,411 sq.m of retail, 69,820–93,080 sq.m of industrial and 57,860–77,160 sq.m of special use** of floorspace will be required by 2031.
- Based on derived floorspace requirements and observed floorspace ratios, MacroPlan Dimasi estimates around **2.9–3.8 hectares of commercial, 14.5 hectares of retail, 11.6-15.5 hectares of industrial and 2.9–3.9 hectares of special uses** land will be required by 2031.
- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Tweed LGA (out to 2031).
- It is recognised that the Tweed LGA may need to plan for more business zoned land to accommodate demand post 2031 (as it is estimated there will only be 4.8 hectares available for development as at 2031).
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 4.8 hectares*
  - *Supply of industrial land will exceed demand by 385.4 hectares*
  - *Supply of special uses land will exceed demand by 69.1 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Tweed LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Tweed LGA, particularly for emerging businesses and industries.

- It is recognised that Tweed LGA will need to plan for more business zoned land to accommodate demand post 2031, as it is estimated there will only be 4.8 hectares available for development post 2031.
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Tweed LGA.

### 3.2 Literature review

There are many relevant local Council plans and policies for the Tweed Shire LGA, in addition to the FNCRS. The Tweed Shire Economic Development Strategy 2014 (TSEDS) provides a framework for existing and new economic development initiatives and was created by the Council in conjunction with Destination Tweed. Tweed Shire Retail Policy (2006) (Retail Policy) was informed by the (Draft) Tweed Retail Strategy (2005) and outlines the principles for retail development within Tweed Shire.

The following key points are noted from the Retail Policy:

- The Retail policy focuses on protecting the character of existing towns and villages, generally supporting convenience oriented retail development.
- The policy finds Tweed Heads South is the major district centre, and future development is encouraged in this location. Council will support incremental expansion to centres where appropriate, in preference to new (unplanned) centres). However, Council does not support the development of a new district shopping centre.
- The policy found there are sufficient stocks of industrial and commercial land supply across the Tweed Shire to support employment to 2031.

The TSEDS outlines the following growth opportunities:

- Tweed Shire is ranked 5th of all Australian LGA's (in 2014) for economic diversity, with Tweed Heads the main area of employment.

- Tweed Hospital is identified as one of the largest employers in the Shire and is proposed to be the foundation of a future health precinct.
- Further health service opportunities exist in the future expansion of the Murwillumbah Hospital.
- Murwillumbah is also targeted for growth in the creative industries sector, which will be supported through the preparation of a CBD Masterplan.
- Murwillumbah Airfield provides important employment land as it is surrounded by industrial development such as the Airfield Industrial Estate.
- Over the whole of the Tweed Shire the Strategy promotes continued growth in tourism, health and education for the long term.
- Other opportunities for growth include the Tweed Heads working riverfront which currently supports a small fishing industry. The strategy focuses on maintaining the current fleet and exploring other water related industries e.g. Charters and tours from the riverfront area.
- Jack Evans Boat Harbour precinct, which has undergone recent parkland redevelopment, presents an opportunity for growth in dining, the arts, and tourist retail.
- The TSEDS found that Tweed Shire currently has adequate stocks of zoned land for industrial and commercial purposes, but it will be important to maintain quality and ensure there is an adequate supply into the future.
- The Urban Release Strategy 2009 prepared by GHD which informed the TSEDS ear-marks future local/neighbourhood centres at Cobaki Lakes and Kings Forest.

It is noted that the NSW budget 2014/15 earmarks Tweed Police Station as a priority for development. Tweed Shire's economy is influenced by the Gold Coast LGA (within QLD) due to its close proximity and the significant development of land along the border. Of particular note is the Gold Coast Airport, located partially within Tweed Shire. The Gold Coast Economic Development Strategy

2013 (GCEDS 2013) identifies the Gold Coast Airport for future expansion, which will assist in creating an economic gateway for freight logistics.

The Gold Coast Industrial Future Study 2014 prepared by MacroPlan Dimasi on behalf of the Gold Coast City Council found the closest industrial precinct in QLD is a 77 ha industrial precinct in Currumbin, 10km's from Tweed Shire. The GCEDS 2013 also states that there may be the opportunity for economic growth due to cross border connections. The Southern Cross University Gold Coast Campus adjoins the Tweed Shire boundary, and has a strong focus on health based degrees (nursing, anatomy, biomechanics and physiology). The University also operates a teaching facility within Tweed Heads.

### 3.3 Socio-demographic trends

#### 3.3.1 Population change

- According to ABS ERP figures, the Tweed LGA increased by 6,906 persons from 2006 – 2011, taking the LGA's population to 88,437 persons as at 2011.

<b>Year</b>	<b>Estimated Resident Population</b>	<b>Total Change (persons)</b>
2001	73,980	
2006	81,531	7,551
2011	88,437	6,906

*Source: ABS*

- All age cohorts in the Tweed LGA experienced population growth over the five year period.
- Persons aged 50-64 and 65+ experienced the highest rate of population growth, increasing by 2,689 and 2,239 persons respectively.

<b>Age cohort</b>	<b>2006</b>	<b>2011</b>	<b>Change 2006-2011</b>	<b>Composition 2011</b>
0-19	20,150	21,082	932	24%
20-34	11,324	12,231	907	14%
35-49	16,545	16,684	139	19%
50-64	15,807	18,496	2,689	21%
65+	17,705	19,944	2,239	23%
<b>Total</b>	<b>81,531</b>	<b>88,437</b>	<b>6,906</b>	<b>100%</b>

*Source: ABS*

### 3.3.2 Migration movements

Inward and outward movements for each LGA have been analysed, using 2006 and 2011 Census data (place of usual residence). Migration represents an important source of demand for Tweed LGA.

- Over the five years to 2011, net migration into Tweed LGA totalled 5,624 persons, making it the largest LGA within the Far North Coast for net migration gain.
- People moving from overseas represented the largest share of the migration gain (1,985 persons), while movements from Sydney represented the second largest source of migration gain.
- By age, migration was most pronounced amongst the 35-49 age cohort, expanding by 1,956 persons.



**Table 3.3**  
Net Migration by Age - Tweed LGA

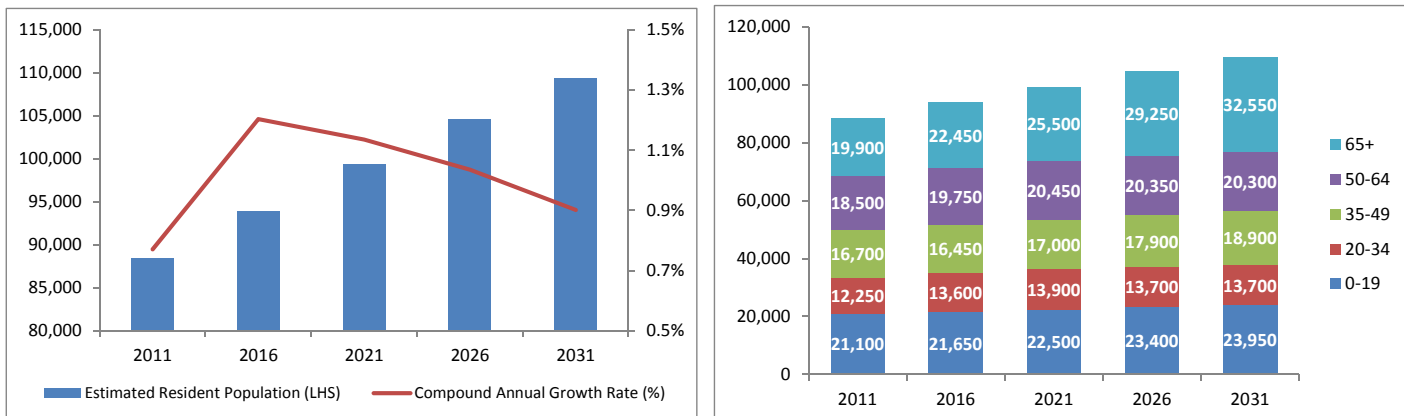
Region	0-19	20-34	35-49	50-64	65+	Total
Mid North Coast	109	165	139	100	55	568
Sydney	306	95	527	398	239	1,565
Regional NSW	211	161	146	139	40	697
Interstate	166	-921	609	654	301	809
Overseas	358	741	535	229	122	1,985
<b>Total Net Migration</b>	<b>1,150</b>	<b>241</b>	<b>1,956</b>	<b>1,520</b>	<b>757</b>	<b>5,624</b>

*Source: ABS*

### 3.3.3 Population projections

- According to new projections provided by the DP&E, the population of the Tweed LGA is projected to expand to 109,400 by 2031.
- This rate of growth is equivalent to population growth of 1,049 persons per annum.

**Figure 1. Projected Population and population by age (2011 to 2031)**



- Persons aged 65+ are expected to provide much of the population growth, increasing to 32,550 persons by 2031.
- Growth in all other age cohorts is expected to be strong, particularly the family dominated age cohorts of 0-19 and 35-49 with additions of 2,850 and 2,200 persons respectively.

### 3.3.4 Labour force status

- As at 2011, the Tweed LGA entailed resident population of 88,437 persons.
- Of all residents, around 82% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 54% i.e. 35,607 of 65,844 residents.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking working).
- The Tweed LGA's labour force composition resembles the North Coast's profile (92% employed and 8% unemployed for the North Coast).

**Table 3.4**  
Labour Force Status by Age (number) - Tweed LGA

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	2,174	511	2,685	2,285	4,970
20 - 29	4,875	673	5,548	1,383	6,931
30 - 39	6,217	496	6,713	1,673	8,386
40 - 49	8,242	553	8,795	1,921	10,716
50 - 59	7,793	501	8,294	3,241	11,535
60 - 69	2,945	199	3,144	7,194	10,338
70 - 79	353	8	361	7,322	7,683
80 - 84	50	0	50	2,788	2,838
85+	17	0	17	2,430	2,447
<b>Total</b>	<b>32,666</b>	<b>2,941</b>	<b>35,607</b>	<b>30,237</b>	<b>65,844</b>

Source: Census of Population and Housing (2011)

### 3.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are also employed within the boundaries of the Tweed LGA.
- Approximately 57.3% of employed residents worked in the Tweed LGA.

- The remaining 41% of working residents travel either to other North Coast LGAs (2.8%) or locations outside the North Coast (39.9%) for work.
- Around 25% of employed residents travel into Queensland for work.
- According to ABS Census data, approximately 3,870 of jobs in Tweed LGA are filled by workers who live in Queensland.
- Of working residents who travelled to other North Coast LGA, the most popular workplace destination is Byron LGA (1.8%).

**Table 3.5**  
**Job Containment - Tweed LGA**

	Value
Working residents	32,278
<u>Place of Work (number)</u>	
Tweed	18,498
North Coast LGAs (ex. Tweed)	913
Outside North Coast	12,867
<b>Total</b>	<b>32,278</b>
<u>Job Containment (%)</u>	
Tweed	57.3%
North Coast LGAs	2.8%
Other	39.9%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Job containment by industry classification for Tweed LGA is presented in the next table.
- Relative to the all industries average for Tweed LGA (57.3%), ten industries achieved high job containment.
- Of all industries, Agriculture, Forestry and Fishing (78%) achieved the highest rate of job containment in 2011, followed by Retail Trade (69.6%) and Education and Training (65.6%).

- Industries with high job containment are predominantly service orientated and generally trade to a localised market.

Table 3.6  
Job Containment by Industry - Tweed LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Agriculture, Forestry and Fishing	78.0%	3.1%	18.9%	100.0%
Retail Trade	69.6%	2.4%	28.0%	100.0%
Education and Training	65.6%	3.8%	30.6%	100.0%
Health Care and Social Assistance	64.3%	2.4%	33.4%	100.0%
Electricity, Gas, Water and Waste Services	62.8%	4.3%	32.9%	100.0%
Accommodation and Food Services	62.0%	1.9%	36.1%	100.0%
Rental, Hiring and Real Estate Services	61.3%	1.2%	37.5%	100.0%
Other Services	60.3%	3.0%	36.6%	100.0%
Financial and Insurance Services	59.4%	3.6%	36.9%	100.0%
Professional, Scientific and Technical Services	57.8%	1.7%	40.5%	100.0%
<b>Across all industries</b>	<b>57.3%</b>	<b>2.8%</b>	<b>39.9%</b>	<b>100.0%</b>
Wholesale Trade	53.4%	3.7%	42.9%	100.0%
Public Administration and Safety	52.3%	5.8%	41.9%	100.0%
Manufacturing	51.4%	3.6%	45.0%	100.0%
Transport, Postal and Warehousing	51.4%	2.5%	46.2%	100.0%
Arts and Recreation Services	51.3%	1.7%	47.0%	100.0%
Information Media and Telecommunications	45.9%	3.8%	50.3%	100.0%
Administrative and Support Services	44.8%	3.3%	51.8%	100.0%
Construction	35.2%	2.8%	62.0%	100.0%
Mining	13.8%	0.0%	86.2%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 3.4 Employment and labour market trends

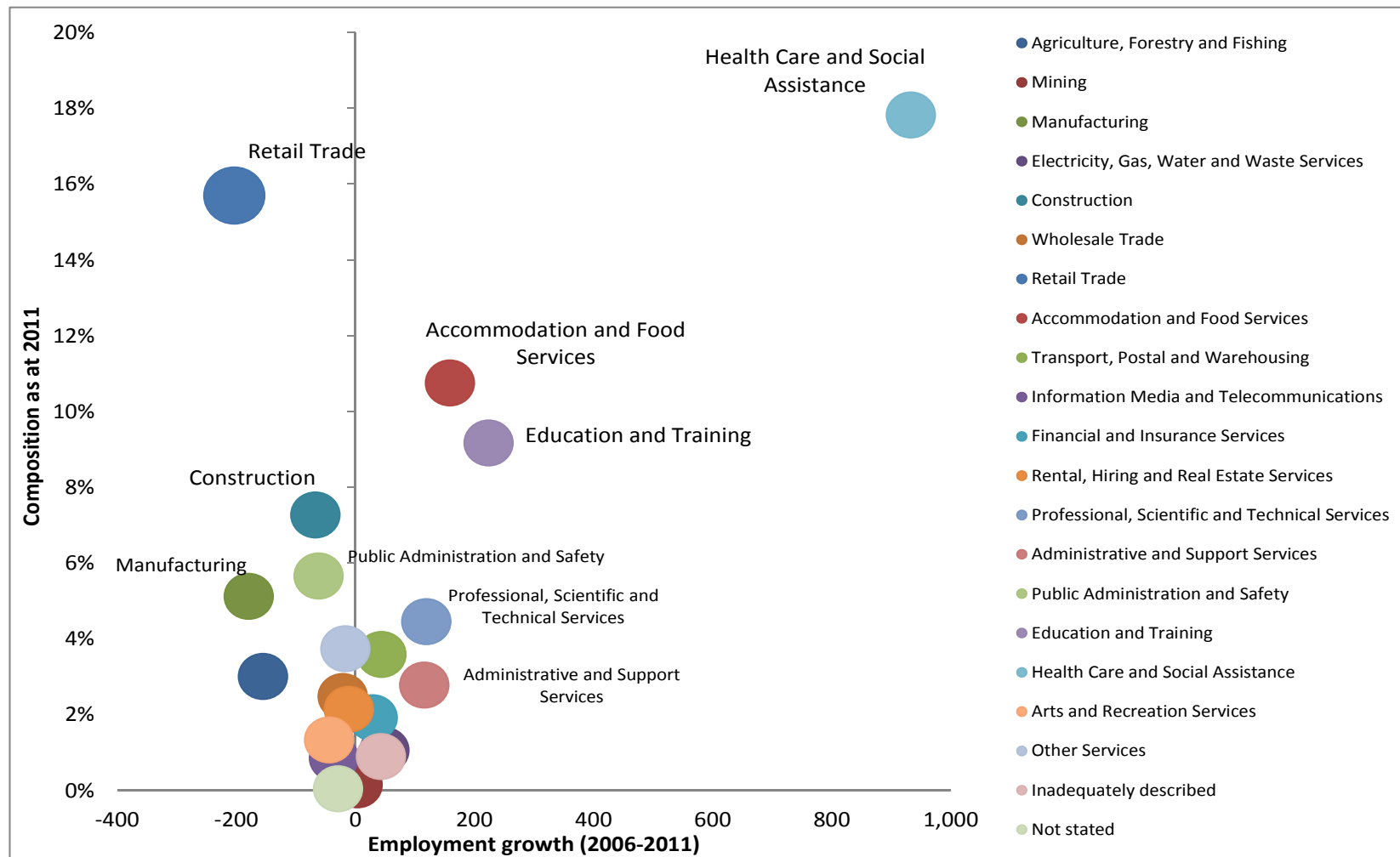
### 3.4.1 Industry composition

- The purpose of the current analysis is to generate an employment profile for the Tweed LGA and identify the key emerging trends and drivers that have 'shaped' its workforce over the last five years.
- Our analysis of employment trends is based on jobs within the LGA rather than on working residents living within the LGA. This is because demand for employment land is supported by jobs and not residents.
- As at 2011, the Tweed LGA supported 23,175 jobs, accounting for 12.8% of total jobs in the North Coast (NC) region.
- The employment profile of the Tweed LGA has a pronounced skew to industries that are directly linked to tourism and serving local needs. For example,

persons employed Health Care and Social Assistance account for 17.8%, on par with the broader North Coast average.

- The next largest employing industries include Retail Trade (15.7%), Accommodation and Food Services (10.8%) and Education and Training (9.2%).
- White collar employment is on par with the North Coast average, while there is a lower representation of persons employed in traditional labour intensive industries – i.e. Manufacturing, Agriculture, Forestry and Fishing and Construction employ 15.4% in comparison to the NC average of 17.8%.
- Looking ahead, greater emphasis and support will be required on health services, particularly given the area's pronounced skew to aged persons.
- Over the five years to 2011, 896 new jobs were created in the Tweed LGA.
- In Tweed LGA (and consistent with national trends), Health Care and Social Assistance registered the greatest rise in employment over the period (+933 jobs), significantly larger than Education and Training (+224 jobs), Accommodation and Food Services (+159 jobs) and Professional, Scientific and Technical Services (+119 jobs).
- On the other hand, there were 11 industries that registered outright declines over the five years to 2011, with Retail Trade (-203 jobs), Manufacturing (-179 jobs) and Agriculture, Forestry and Fishing (-155 jobs) recording job losses to employment.
- Representing the second largest industry, job losses in Retail Trade was most likely the result of weak domestic tourism volumes. During this period, a strong Australian Dollar prompted a surge in short-term overseas trips (at the expense of domestic locations).

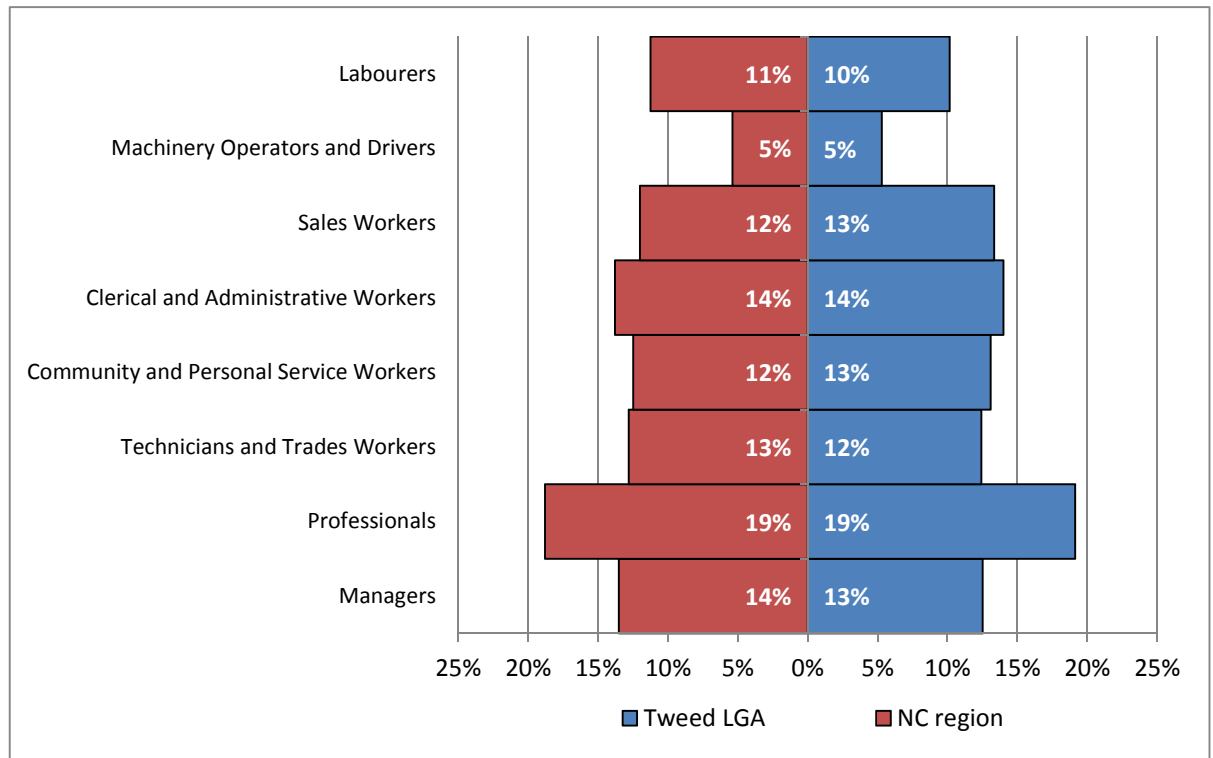
Figure 2. Employment composition and growth by industry, Tweed LGA



### 3.4.2 Occupation profile

- As at Census 2011, the largest employing occupation was 'Professionals', accounting for 19% of jobs in Tweed LGA.
- The Tweed LGA occupational profile resembles the North Coast's workforce.

**Figure 3. Occupation Composition (2011)**



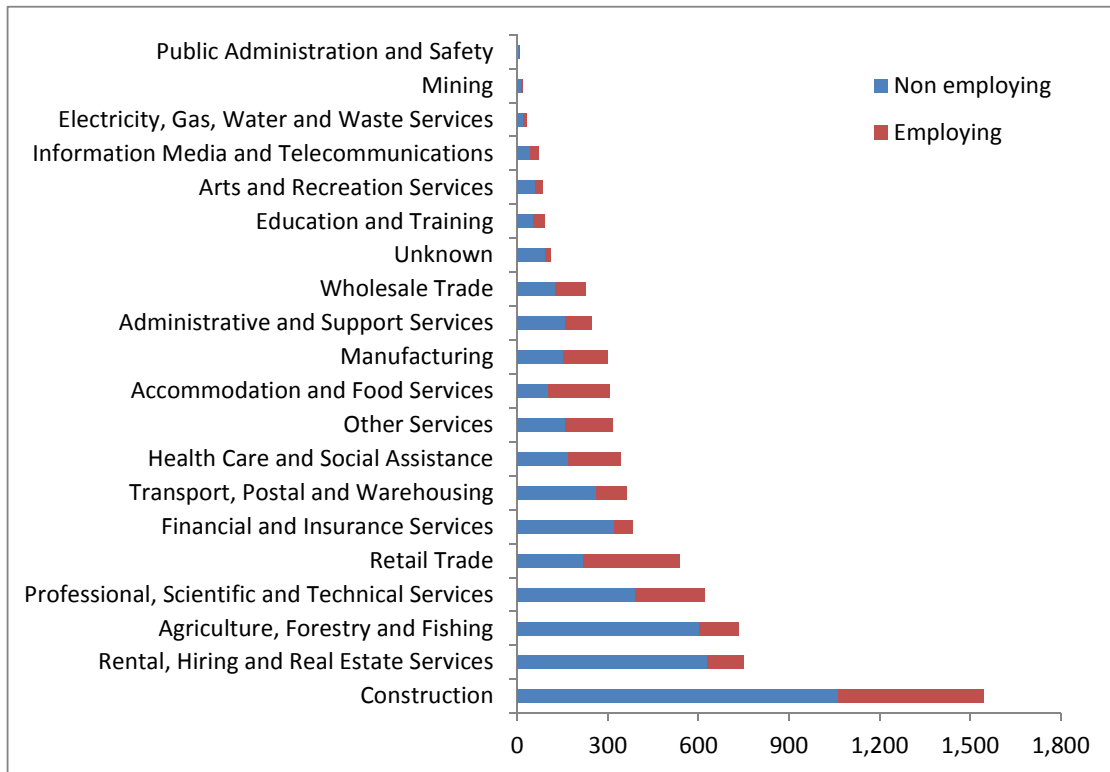
Source: ABS, MacroPlan Dimasi

### 3.4.3 Business composition & change

- As at June 2011, there were 7,085 businesses operating within the Tweed LGA, with 65% being non employing/sole trading businesses.
- Businesses operating within the Construction industry accounted for 22% of total businesses. Retail Trade made up 7.6% of total businesses.
- Of businesses that employ, the largest two business industries are Construction (482 in total) and Retail Trade (320 in total)

- At June 2011, there were 12 businesses employing 200 or more persons within the Tweed LGA i.e. three businesses in Construction, Electricity, Gas, Water and Waste Services, Health Care and Social Assistance and Other Services industries.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses operating in the Tweed LGA contracted by 24. The loss in operating businesses was most pronounced amongst employing businesses (-110).
- Business growth over the period was highest for white collar industries - Financial and Insurance Services (+42) and Professional, Scientific and Technical Services (+38).
- On the other hand, reductions in business numbers was greatest within Transport, Postal and Warehousing (-63) and Agriculture, Forestry and Fishing (-45).



Table 3.7  
Business Composition and Change - Tweed LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	11	-2	9
Retail Trade	-6	-2	-8
Accommodation and Food Services	-5	-15	-20
Education and Training	-3	30	27
Construction	-17	-18	-35
Public Administration and Safety	6	-3	3
Manufacturing	6	-27	-21
Professional, Scientific and Technical Services	28	10	38
Other Services	16	2	18
Transport, Postal and Warehousing	-36	-27	-63
Agriculture, Forestry and Fishing	-7	-38	-45
Administrative and Support Services	0	-11	-11
Wholesale Trade	19	-15	4
Rental, Hiring and Real Estate Services	7	-16	-9
Financial and Insurance Services	34	8	42
Arts and Recreation Services	-6	-3	-9
Electricity, Gas, Water and Waste Services	9	6	15
Information Media and Telecommunications	19	-1	18
Mining	-3	3	0
Not Classified	14	9	23
<b>Total</b>	<b>86</b>	<b>-110</b>	<b>-24</b>

Source: ABS

### 3.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Given Tweed's proximity to south-east Queensland, there is a relatively high leakage of workers north of the border, particularly in Health Care and Social Assistance where there is a net leakage i.e. in this industry 1,175 Tweed LGA's working residents work in Queensland and 791 Queensland's working residents work in Tweed LGA.
- Containment of these workers will be vital to supplementing retirement within the local workforce, and addressing the needs of an ageing resident base.
- Employment within Tweed has a heavily reliance on the tourism sector utilising a strong local accommodation, food and beverage, cultural and retail services sector.

- The LGA's ageing population, coupled with a strong inward movement of other retirees has the potential to place pressures on aged and health care facilities due to increased demand in the Tweed.
- Over the past five years, there has been a shift away from the primary (resource-based) sector, including agricultural commodities of sugar cane, dairy products, bananas and vegetable growing industries. Weakening employment growth within these industries has made way for employment growth in higher order white collar industries.
- Looking ahead, as knowledge-intensive industries continue to increase in importance, the key to securing long-term economic security and the stem the outflow of workers to South–East QLD is to attract and retain these industries and workers within Tweed LGA (and NSW).

### **3.5 Employment land supply**

#### **3.5.1 Zoned Urban Employment Land**

- Based on zoning layers issued by the Department of Planning and Environment (July 2014), we have obtained the amount of zoned employment land in the Tweed LGA.
- The information presented is based on two instruments, the Tweed Local Environmental Plan 2014 and the Tweed City Centre Local Environment Plan 2012.
- In the Tweed LGA, there are three main employment land use categories, including Business, Industrial and Special Uses.
- The next two tables below present the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type under each of the current LEP instruments.

**Table 3.8**  
Zoned Employment Land - Tweed LGA (LEP)

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	5.1	1%
	B2. Local Centre	41.8	6%
	B3. Commercial Core	34.0	5%
	B4. Mixed Use	49.1	7%
	B5. Business Development	91.4	13%
	B7. Business Park	5.2	1%
	<b>Total</b>	<b>226.5</b>	<b>31%</b>
Industrial	IN1. General Industrial	258.5	35%
	IN4. Working waterfront	0.2	0%
	<b>Total</b>	<b>258.7</b>	<b>35%</b>
Special Uses	SP1. Special Activities	193.6	27%
	SP2. Infrastructure	19.2	3%
	SP3. Tourist	32.2	4%
	<b>Total</b>	<b>245.0</b>	<b>34%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>730.2</b>	<b>100%</b>

Source: NSW Department of Planning and Environment (2014)

- Under the Tweed LEP 2014, there are approximately 730.2 hectares of land zoned for urban employment purposes.
- Distribution amongst employment land zones is fairly even, ranging between 31% and 34% – Industrial (35%), Special Uses (34%) and Business (31%).
- At 258.7 hectares, land zoned for industrial purposes is significant, the majority of which as IN1 General Industrial.
- Within the six designated business zones (B1, B2, B3, B4, B5 and B7), there is 226.5 hectares of zoned urban land. A significant proportion of this land is assigned to B5 Business Development (91.4 hectares).
- Comprising of 245 hectares, the Special Uses category includes 193.6 hectare of land for 'Special Activities' purposes.

<b>Classification</b>	<b>Land Use Zone</b>	<b>Area (ha)</b>	<b>%</b>
Business	B2. Local Centre	1.3	3%
	B3. Commercial Core	25.0	57%
	B4. Mixed Use	16.3	37%
	<b>Total</b>	<b>42.7</b>	<b>98%</b>
Industrial	IN4. Working waterfront	0.9	2%
	<b>Total</b>	<b>0.9</b>	<b>2%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>43.6</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- Under the Tweed City Centre LEP 2012, there are approximately 43.6 hectares of land zoned for urban employment purposes.
- It is estimated 98% of this land is zoned for Business uses, with 57% attributed to a B3 Commercial Core zoning.

# Map 3.1

## Tweed Shire Employment Land Zones

### Legend \*

 Tweed Shire Boundary

### Land Zones

 B1

 B2

 B3

 B4

 B5

 B6


 B7

 IN1

 IN2

 IN3

 IN4

 Proposed Industrial Precincts

















# Map 3.2

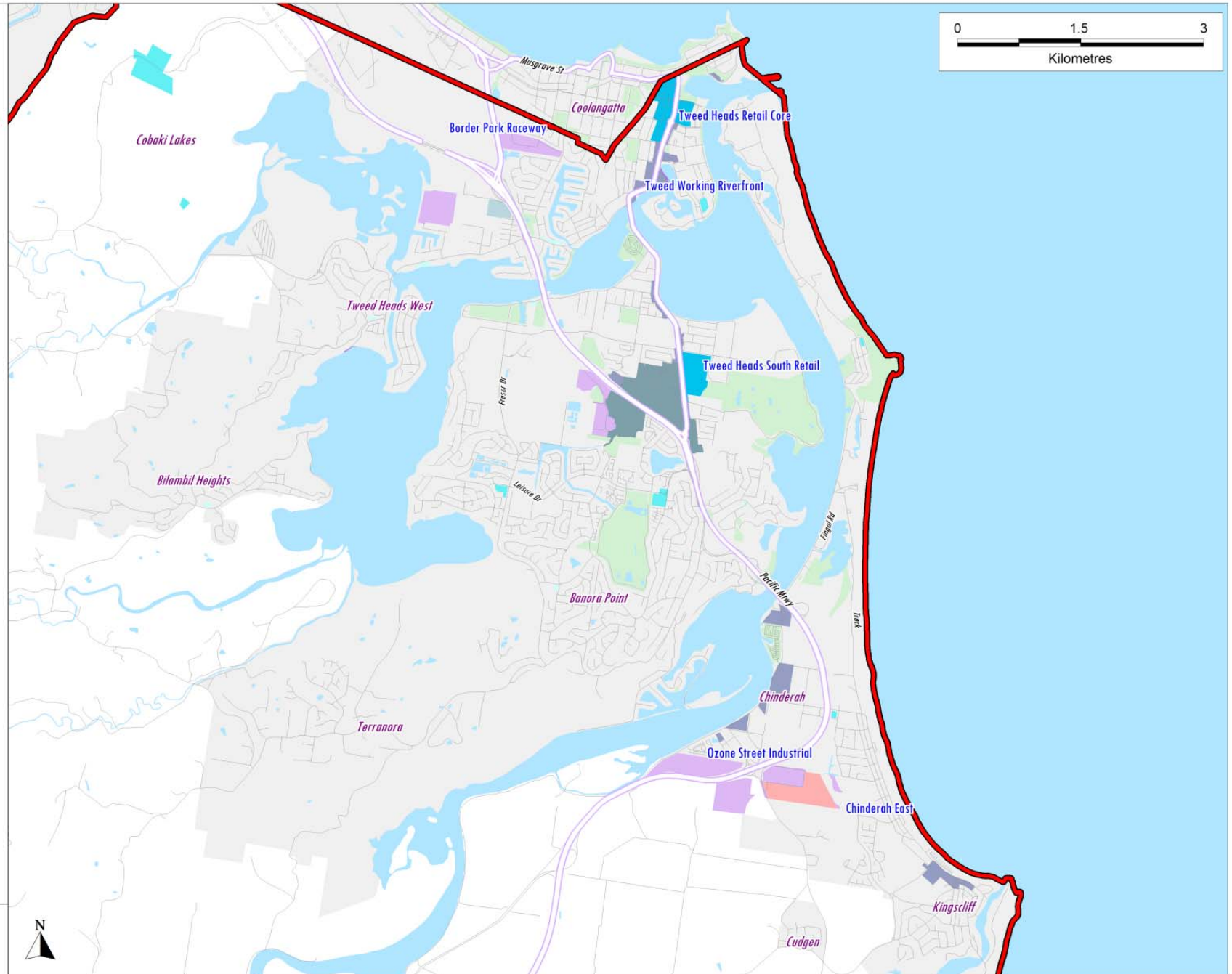
## Tweed Heads Employment Land Zones

### Legend \*

 Tweed Shire Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



### 3.5.2 Industrial – Existing supply

- In the Tweed LGA, two industrial zones used i.e. IN1 General Industrial and IN4 Working Waterfront.
- Our examination has identified three industrial precincts in the Tweed LGA (as presented in the table below).

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
Airfield Industrial Precinct	180.0	120.0	67%
Ozone Street Industrial Precinct	70.0	18.0	26%
Tweed Working Riverfront	8.0	6.0	75%
<b>Total</b>	<b>258.0</b>	<b>144.0</b>	<b>56%</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our examination include:

- The two identified precincts occupy 258 hectares of industrial zoned land.
- The largest precinct is the **Airfield Industrial Precinct**, which is positioned 1 km from the Murwillumbah Airfield, and is within reach of the Tweed Valley Way.
- Existing uses at this precinct include self-storage facilities, stone and wood brewery, transport (Shoobridge Transport) and other local orientated businesses such as Carls Joinery Contracting, Murwillumbah Landscape Supplies.
- The **Ozone Street Industrial Precinct** is located within the town of Chinderah, and falls within the perimeter of the town and surrounds. Through the Tweed Coast Road, the precinct has access direct access to the Pacific Highway.

- Existing uses at this precinct include a sewerage treatment plant, Boral concrete, Marshal timber traders and other local orientated businesses (e.g. Kingscliff Hire and Landscape supplies, Tweed Coast Glass Tweed Wreckers, etc.).
- Of the total, it is estimated that around 144.0 hectares or 56% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 114.0 hectares of zoned capacity available for future development.
- At an observed floor space ratio of 0.6:1, approximately 68.4 hectares of industrial floorspace could be delivered through existing zoned industrial land (assuming there are no constraints).

### 3.5.3 Industrial – Future supply

- Our investigation on future industrial supply indicate that there are a number of areas that, subject to further investigation, may be suitable for rezoning to accommodate future employment growth.
- These areas are summarised in the table below.

<b>Precinct</b>	<b>Land area</b> (Hectares)	<b>Timing</b> (Years)
Wardrop Valley East	63.0	1 - 10
Wardrop Valley West	60.0	1 - 10
Border Park Raceway	11.0	1 - 10
Ozone street Industrial Precinct	5.0	1 - 10
West Pottsville	86.0	10 - 20
Airport Precinct (Area 2)	23.0	10 - 20
Airport Precinct (Area 1)	11.0	10 - 20
Chinderah East	26.0	10 - 20
<b>Total</b>	<b>285.0</b>	

*Source: Macroplan Dimasi*

- In total, there is an additional 285 hectares of land that could be made available for development in the Tweed LGA.



- Of the proposed precincts, the site at **West Pottsville** is the largest comprising up to 86 hectares. It is well connected to the Pacific Highway. At present, this location does not have an industrial presence.
- Immediately surrounding the Tweed Valley Enterprise Park, two future precincts have been identified. These precincts are anticipated to be delivered over the next decade, across two stages.
- The first stage, **Wardrop Valley West**, is proximate to existing services. However, there are some reservations about the market attractiveness of the precinct.

#### 3.5.4 Retail & commercial – Existing supply

The Tweed LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 3.3 and Map 3.4.

- The Tweed LGA centres hierarchy generally consists of the following structure, as defined by the FNCRS:
  - Tweed Heads Regional Centre (including Tweed Heads CBD, Tweed Heads South, Tweed West and the other urban areas).
  - Murwillumbah Town Centre
  - Smaller scale coastal and inland villages (such as Pottsville, Kingscliff, Hastings Point).

#### Tweed Heads Major Regional Centre

- Tweed Heads is the major retail and commercial hub of the Tweed Shire and one of only two Major Regional Centres in the Far North Coast Region. Tweed Heads includes:
  - Tweed Heads CBD, which contains the Centro Tweed (18,000 sq.m) sub-regional shopping centre and a range of retail, commercial, community, entertainment and residential floorspace.

- South Tweed which includes the largest enclosed shopping centre in the LGA, in Tweed City (48,000 sq.m), as well as significant commercial floorspace, strip retail, and a large bulky goods retail precinct that includes the Harvey Norman bulky goods centre.
- Local/neighbourhood centres within the Tweed Heads urban area. The larger of these centres include full supermarket offers as well as supporting specialty stores and non-retail business services, such as those provide at Banora Point Shopping Centre and the Banora Shopping Centre.
- Neighbourhood centres/shops which are typically smaller scale than local centres, and may provide a small supermarket, or general store, as well as limited number of specialty shops and non-retail services. Examples of such centres include Bilambil Heights, Panorama Plaza and Kennedy Plaza.

#### **Murwillumbah Town Centre**

- Murwillumbah Town Centre, as a key inland town that generally serves a district role and function, given the retail and business services in its CBD. The centre provides small IGA and Foodworks supermarkets as well as a good provision of cafes, restaurants, retail specialties and local business, health and community services. There is an estimated 40,000-50,000 sq.m of retail floorspace (Draft Retail Strategy 2005) in total within the town centre.

#### **Inland and Coastal Villages**

- Some of the coastal villages, such as Kingscliff and Cabarita provide a broad range of retail and commercial facilities including specialty stores, business services, medical facilities, post-office, gyms and the like, as well as medium-large supermarkets.
- The smaller inland and coastal villages tend to provide a much smaller range of retail and commercial services and tend to provide much smaller supermarkets, for example, Pottsville.
- Future village/town centres have been identified at Cobaki and Kings Forest.

### **Other competitive retail precincts**

As identified earlier, the Tweed LGA borders the Gold Coast. There is a substantial retail offer provided at Coolangatta, which includes about 10,000 sq.m of street/strip retail along Marine Parade and Griffith Street, as well as the Showcase on the Beach shopping centre, which is currently undergoing a redevelopment. The centre is currently under-going a redevelopment to include a new Woolworths supermarket and a rejuvenated retail, dining and entertainment offer. The redevelopment is expected to be complete in late 2014, when the centre will re-branded as The Strand on Coolangatta.

Further to the north, Pacific Fair and Robina Town Centre are significant regional shopping centres on the Gold Coast that service not only the whole Gold Coast LGA population and visitors/tourists to the Gold Coast, but residents of the Tweed Shire.













# Map 3.3

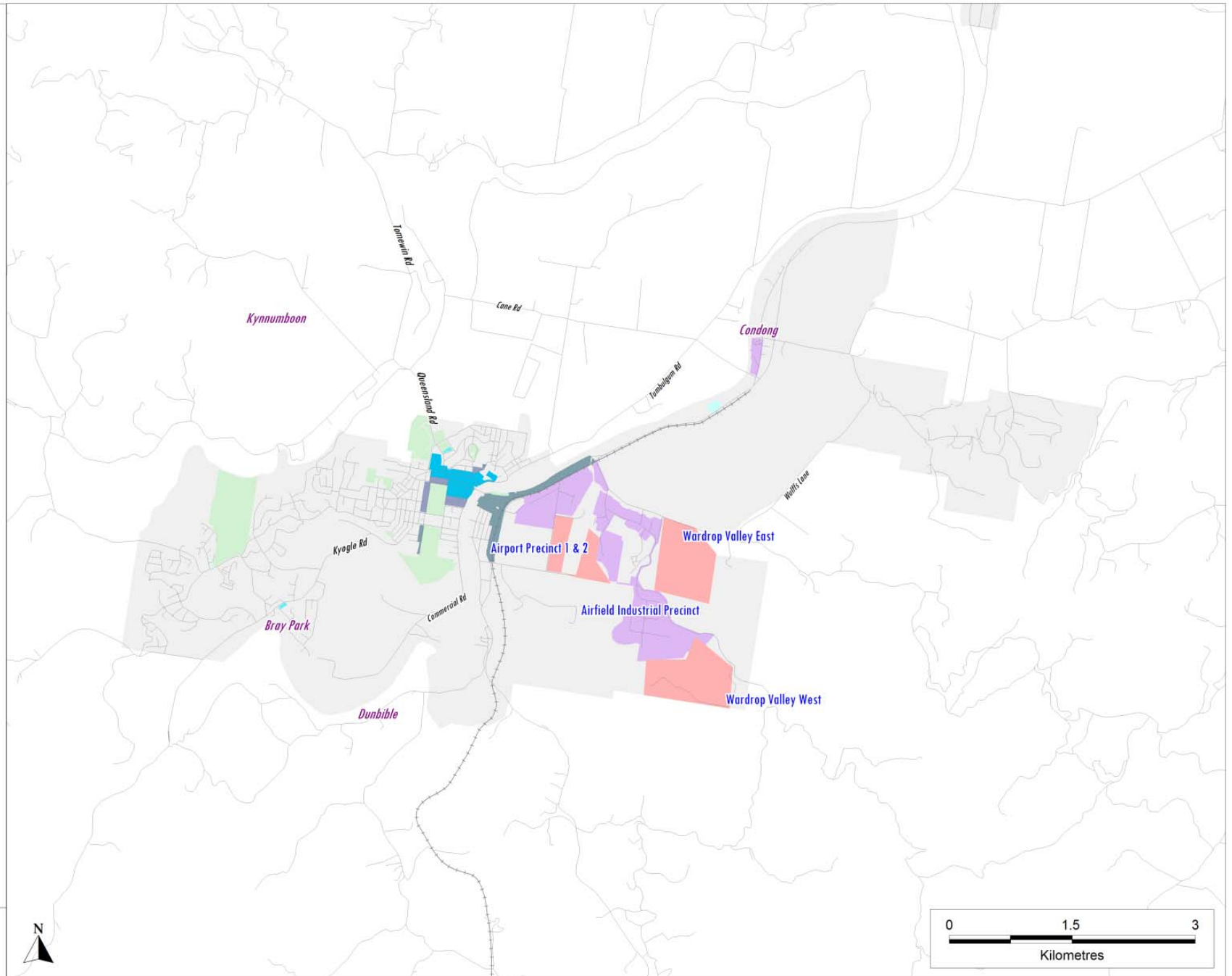
## Murwillumbah Planning Zones

### Legend \*

 Tweed Shire Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precinct



# Map 3.4

## Tweed Shire Retail Provision

### Legend \*

Tweed Shire Boundary

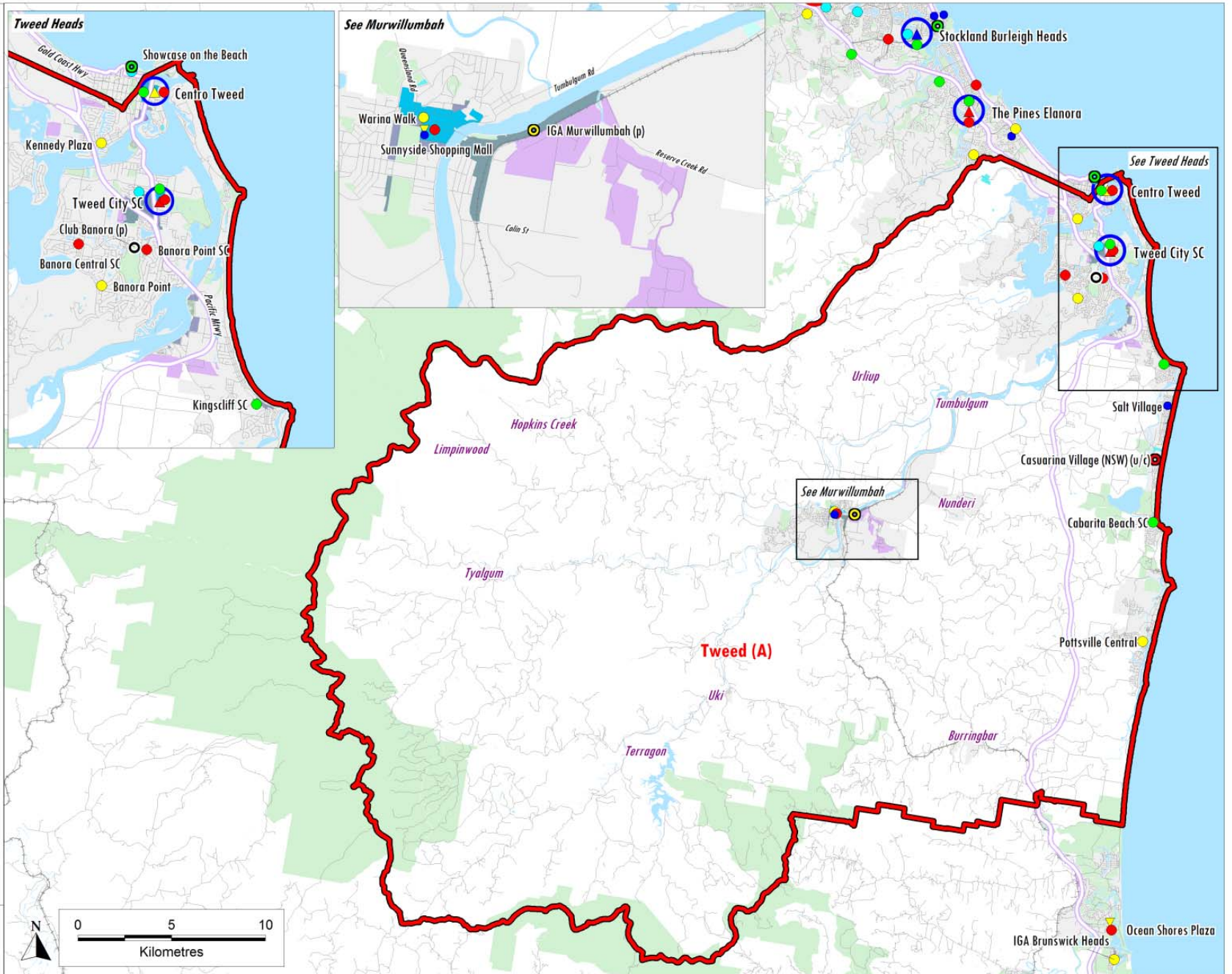
### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

### Retail Competition

- Sub-Regional Centre
- Big W
- Target
- Kmart
- Woolworths
- Coles/Bi-Lo
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores





### **Business zoned land capacity for retail and commercial floorspace**

Table 3.12 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **269.2 hectares of business zoned land** within the Tweed LGA, of which 5.1 ha is B1 zoned land, 43.1 ha is B2 zoned land and 59.0 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There are 91.4 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts.
- There are also 65.5 ha of B4 zoned land and 5.2 ha of B7 zoned land in the LGA.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Tweed Shire LGA to be in the order of 5.66 million sq.m.
- There is no defined FSR for B7 zoned land in the Tweed Shire LEP 2012, we have therefore assumed an FSR of 1:1.
- Existing retail demand is estimated at 197,800 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 5.66 million sq.m. The retail offer in Tweed is generally pretty comprehensive which would result in some inflows from surrounding LGAs such as the Kyogle, Byron and Lismore (and the Gold Coast), however due to the relative accessibility and scale/range of the retail offer in the Gold Coast LGA, we estimate this would be offset by net leakage of about 10% beyond the LGA, resulting in net demand of about 178,000 sq.m, increasing to 223,400 sq.m by 2031.

**Table 3.12**  
Tweed LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B1	5.1	2.0	101,827
Total B2	43.1	2.0	862,011
Total B3	59.0	2.6	1,534,216
Total B4	65.5	2.1	1,374,548
Total B5	91.4	1.9	1,736,089
Total B7*	5.2	1.0	51,595
<b>Total LGA</b>	<b>269.2</b>		<b>5,660,286</b>

\*Assumed FSR

Source: Tweed LEP 2014, MapInfo; NSW Govt; MacroPlan Dimasi

### 3.5.5 Retail & commercial – Future supply

There are several proposed retail developments of significance within the Tweed LGA. The developments most relevant to our analysis include:

- A proposed Masters Home Improvement Centre, to be located in the Boyds Bay Business Park in Tweed Heads West, has development approval to provide some 13,638 sq.m of bulky goods/homemaker floorspace, expected to be completed by early 2016.
- A rezoning application has been submitted for the future development of a retail precinct on Binya Avenue, Tweed Heads and is expected to provide a total of 16,000 sq.m of floorspace, including a Bunnings Warehouse. If approved, the expected completion is mid 2016 dependent upon a timely approval process.
- A rezoning application has been submitted for the redevelopment of Club Banora, expected to include the provision of a smaller club building, and a relocation of the tennis courts and bowling green. Upon completion, the development is expected to incorporate an 11,000 sq.m retirement facility, as well as a 5,000 sq.m retail component expected to include a supermarket and specialty shops.

- The proposed Casuarina Town Centre has development approval to provide some 700 residential units, 1,000 sq.m of retail floorspace, 4,000 sq.m of commercial floorspace and 3,000 sq.m of mixed use (retail and commercial) floorspace over the 19 hectare site. The development is currently deferred, but an indicative completion date is expected to be late 2018.

### 3.5.6 Special uses - Existing supply

- As per the Tweed LEP 2014, there are three categories of 'Special Use' zoning; SP1 Special Activities, SP2 Infrastructure and SP3 Tourist.
- Cemeteries, classified roads, sewerage systems, waste management facilities, water supply systems and other miscellaneous uses have been removed from our estimates of urban employment land for this category
- Comprising of 245 hectares, the Special Uses category includes 193.6 hectares of land for 'Special Activities' purposes. The Gold Coast Airport is included within this category (172.9 hectares) as well as the North Coast TAFE Kingscliff Campus (20.8 hectares). See table 3.13 below.

**Table 3.13**  
Identified Special Use Sites - Tweed LGA

Name	Total Area (hectares)	Purpose
The Gold Coast Airport	172.9	Airport
North Coast TAFE Kingscliff Campus	20.8	Educational Establishment
<b>Total</b>	<b>193.6</b>	

*Source: MacroPlan Dimasi*

- The Gold Coast Airport encompasses the largest proportion of SP1 zoned land (172.9 hectares). Approximately 60% of the airport sits within Tweed Shire Council boundaries and 40% within Gold Coast City Council boundaries.
- This airport is located at the southern end of the Gold Coast, approximately 100 km south of Brisbane and 25 km south of Surfers Paradise. The airport has



more than 350 direct flights each week from many international and domestic destinations including flights from Australia, New Zealand and Asia.

- We estimate that approximately 121 hectares has already been developed, with approximately 52 hectares available for development in the future.

**Figure 5.** Gold Coast – Coolangatta International and Domestic Airport



*Source: SIX maps (NSW Department of Planning and Environment)*

- The Kingscliff TAFE is another major SP1 zoned facility. Totalling 20.77 hectares, we estimate that approximately 4 hectares has been developed, allowing for 16.6 hectares of land to be developed in the future.

**Figure 6. Kingscliff TAFE Regional Context**



*Source: SIX maps (NSW Department of Planning and Environment)*

- There is also a 32.2 hectare allocation to SP3 Tourist (between Cudgen Creek and Snapper Avenue, Kingscliff) and 2 hectares for emergency services facilities (within the SP2 category).

### 3.5.7 Special uses - Future supply

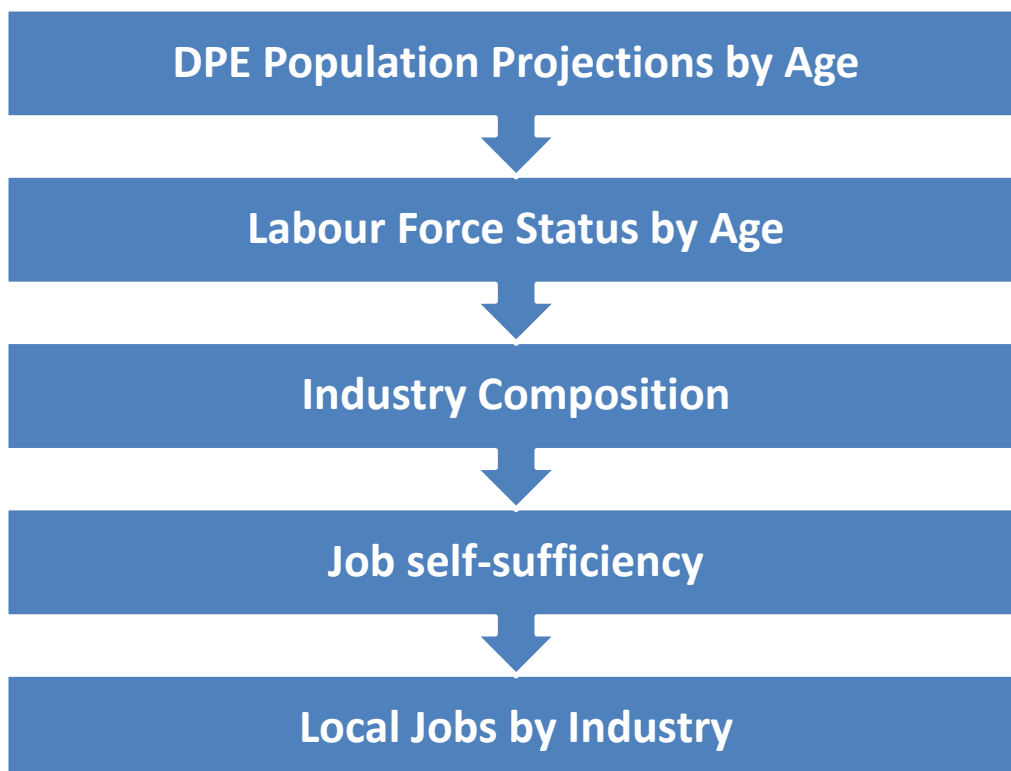
- Relating to SP3 Special Use zoning, the Tweed LGA is set to undertake a \$20.4 million upgrade of the area between Cudgen Creek and Snapper Avenue, Kingscliff. The upgrade will include beach replenishment, an upgrade of the publicly-owned Kingscliff Beach Holiday Park as well as a refurbishment of the Tweed Town Centres' beachfront amenities hall.

## 3.6 Demand for employment land

### 3.6.1 Methodology

- In order to ascertain the quantum of commercial, industrial and special use land required in the Tweed LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in the Tweed LGA to deliver employment.

- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach. The flowchart below depicts the process used to derive employment forecasts for the Tweed LGA.



### 3.6.2 Employment Projections

- Following 896 new job additions over the 2006 and 2011 period, the Tweed LGA workforce is expected to expand by an additional 3,876 jobs over the forecast period (i.e. 2011 to 2031).
- Over the ten years to 2021, employment is expected to increase by 2,237 jobs in the Tweed LGA. As at 2021, the LGA is projected to support 25,413 jobs.
- By 2031, employment in the LGA is expected to increase further to 27,051, which represents growth of 1,638 jobs over the ten year period.
- At an average growth rate of 194 jobs per annum over the 2011 to 2031 period, this rate of employment growth surpasses that observed between 2006 and 2011 (average job growth of 179 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+1,090), Retail Trade (+663), Education and Training (+552) and Accommodation and Food Services (+537) – notably, all these industries are service orientated.
- Outright job losses is predicted for three employing industries i.e. Agriculture, Forestry and Fishing (-103), Manufacturing (-52) and Information Media and Telecommunications (-37).

**Table 8.12**  
**Employment by Industry - Tweed LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	4,130	4,778	5,220	1,090
Retail Trade	3,637	4,016	4,300	663
Education and Training	2,125	2,389	2,677	552
Accommodation and Food Services	2,492	2,847	3,029	537
Construction	1,685	1,826	1,920	235
Professional, Scientific and Technical Services	1,033	1,118	1,190	157
Financial and Insurance Services	446	523	595	149
Transport, Postal and Warehousing	833	915	974	141
Other Services	868	940	1,001	133
Administrative and Support Services	645	710	756	111
Wholesale Trade	575	644	685	110
Rental, Hiring and Real Estate Services	497	543	568	71
Public Administration and Safety	1,312	1,347	1,379	67
Arts and Recreation Services	310	330	352	42
Electricity, Gas, Water and Waste Services	247	254	270	23
Mining	35	38	54	19
Other*	220	178	189	-31
Information Media and Telecommunications	199	185	162	-37
Manufacturing	1,188	1,169	1,136	-52
Agriculture, Forestry and Fishing	698	661	595	-103
<b>Total</b>	<b>23,175</b>	<b>25,413</b>	<b>27,051</b>	<b>3,876</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form typically used by each industry.
- The following table presents the concordance used to convert ABS ANSZIC industry employment figures into specific land use types.

**Table 3.15**  
Industry and Land Use Conversion Matrix - Tweed LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the next table.

**Table 3.16**  
Employment Additions by Land Use Type - Tweed LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	2	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	1	2	6	15	0	0
Construction	14	9	127	85	0	0
Wholesale Trade	55	33	14	8	0	0
Retail Trade	360	270	19	14	0	0
Accommodation and Food Services	248	128	106	55	0	0
Transport, Postal and Warehousing	16	12	66	47	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	77	72	0	0	0	0
Rental, Hiring and Real Estate Services	46	25	0	0	0	0
Professional, Scientific and Technical Services	85	72	0	0	0	0
Administrative and Support Services	65	45	0	0	0	0
Public Administration and Safety	35	32	0	0	0	0
Education and Training	26	29	0	0	238	259
Health Care and Social Assistance	130	88	0	0	519	353
Arts and Recreation Services	20	21	0	0	0	0
Other Services	72	60	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 3.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Tweed LGA (presented in Table 3.18).

**Table 3.17**

**Indicative Employment Density by Industry and Land Use Type - Tweed LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative



employment density for that particular industry). Results for this scenario are presented in Table 3.19.

**Table 3.18**  
Additional Floorspace by Industry under the Base Scenario (sqm) - Tweed LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	70	320	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	30	70	1,610	3,660	0	0
Construction	420	280	18,980	12,760	0	0
Wholesale Trade	1,650	990	2,750	1,640	0	0
Retail Trade	14,400	10,800	2,650	1,990	0	0
Accommodation and Food Services	12,420	6,380	15,960	8,200	0	0
Transport, Postal and Warehousing	490	350	13,120	9,370	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	1,930	1,790	0	0	0	0
Rental, Hiring and Real Estate Services	1,150	620	0	0	0	0
Professional, Scientific and Technical Services	2,130	1,790	0	0	0	0
Administrative and Support Services	1,630	1,140	0	0	0	0
Public Administration and Safety	880	800	0	0	0	0
Education and Training	1,060	1,150	0	0	11,890	12,970
Health Care and Social Assistance	5,190	3,530	0	0	31,130	21,170
Arts and Recreation Services	820	850	0	0	0	0
Other Services	2,900	2,410	0	0	0	0
<b>Total</b>	<b>47,100</b>	<b>32,950</b>	<b>55,140</b>	<b>37,940</b>	<b>43,020</b>	<b>34,140</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated approximately **47,100 sq.m of commercial, 55,140 sq.m of industrial and 43,020 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **32,950 sq.m of commercial, 37,940 sq.m of industrial and 34,140 sq.m of special uses** floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 3.19.



- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 3.19**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Tweed LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	50	240	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	20	50	1,210	2,750	0	0
Construction	320	210	14,240	9,570	0	0
Wholesale Trade	1,240	740	2,060	1,230	0	0
Retail Trade	10,800	8,100	1,990	1,490	0	0
Accommodation and Food Services	9,310	4,780	11,970	6,150	0	0
Transport, Postal and Warehousing	370	260	9,840	7,030	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	1,450	1,350	0	0	0	0
Rental, Hiring and Real Estate Services	860	470	0	0	0	0
Professional, Scientific and Technical Services	1,600	1,340	0	0	0	0
Administrative and Support Services	1,220	850	0	0	0	0
Public Administration and Safety	660	600	0	0	0	0
Education and Training	790	860	0	0	8,920	9,720
Health Care and Social Assistance	3,890	2,650	0	0	23,340	15,880
Arts and Recreation Services	610	630	0	0	0	0
Other Services	2,170	1,810	0	0	0	0
<b>Total</b>	<b>35,310</b>	<b>24,700</b>	<b>41,360</b>	<b>28,460</b>	<b>32,260</b>	<b>25,600</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicates **35,310 sq.m of commercial, 41,360 sq.m of industrial** and **32,260 sq.m of special use** floorspace will be required by 2021.
- Over the ten years to 2031, an additional **24,700 sq.m of commercial, 28,460 sq.m of industrial** and **25,600 sq.m of special uses** floorspace is expected to materialise.

### 3.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Tweed LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B1 Neighbourhood Centre 2:1
  - B2 Local Centre 2:1
  - B3 Commercial Core 2.0-4.5:1
  - B4 Mixed Use 0.8-4.5:1
  - B5 Business Development 0.6-2.0:1
  - IN1 General Industrial 0.6:1
  - SP3 Tourist 2.0:1
- As such, an observed average FSR of 2:1 has been applied across all business zones, 0.6:1 for industrial uses and 2:1 for Special Use zoned land.

**Table 3.20**

**Demand for Employment Land (2031) - Tweed LGA**

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	6.0 - 8.0	2.1	2.9 - 3.8
Industrial	7.0 - 9.3	0.6	11.6 - 15.5
Special Uses	5.8 - 7.7	2.0	2.9 - 3.9

Source: MacroPlan Dimasi

- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **2.9–3.8 hectares of commercial, 11.6-**

**15.5 hectares of industrial** and **2.9–3.9 hectares of special uses** land will be required by 2031.

### 3.6.5 Demand for Retail Floorspace

The potential drivers of future demand for retail floorspace in the Tweed LGA are summarised below:

- Population growth – which is expected to be strong, growing at an average of 1.1% per annum to 2031 (a net increase of 23.7% or 21,000 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 3.21 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Tweed LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 3.21 shows the following:

- The residential population of the Tweed LGA generates approximately **185,100 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **72,411 sq.m** by 2031, an increase of about **37%** over this timeframe.

- Estimated retail floorspace demand generated by tourists equates to about **17,293 sq.m**, and is expected to increase by about **5,000 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **14.5 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	91,780	94,000	99,350	104,550	109,400	1.0%
Tourism equiv. pop	6,973	7,141	7,548	7,943	8,311	1.0%
<b>Retail exp. (\$M)</b>						
Food & liquor	511	532	587	647	711	2.0%
Food catering	131	137	153	170	189	2.2%
Apparel	97	100	108	116	124	1.4%
Household	187	192	207	223	238	1.4%
Leisure	52	54	59	64	70	1.7%
General	87	91	101	113	125	2.1%
Retail services	<u>32</u>	<u>33</u>	<u>36</u>	<u>39</u>	<u>42</u>	<u>1.7%</u>
<b>Total</b>	<b>1,098</b>	<b>1,139</b>	<b>1,250</b>	<b>1,373</b>	<b>1,499</b>	<b>1.9%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	56,819	59,080	65,170	71,933	78,958	2.0%
Food catering	21,779	22,759	25,417	28,404	31,566	2.2%
Apparel	17,707	18,230	19,616	21,120	22,614	1.4%
Household	62,240	64,077	68,947	74,235	79,488	1.4%
Leisure	8,725	9,027	9,835	10,722	11,624	1.7%
General	14,582	15,207	16,900	18,793	20,782	2.1%
Retail services	<u>5,273</u>	<u>5,456</u>	<u>5,944</u>	<u>6,480</u>	<u>7,025</u>	<u>1.7%</u>
<b>Total</b>	<b>185,143</b>	<b>192,105</b>	<b>210,817</b>	<b>231,532</b>	<b>252,920</b>	<b>2.0%</b>
<b>Floorspace per capita</b>	<b>2.02</b>	<b>2.04</b>	<b>2.12</b>	<b>2.21</b>	<b>2.31</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	6,973	7,141	7,548	7,943	8,311	1.0%
Floorspace per capita	<u>1.82</u>	<u>1.84</u>	<u>1.91</u>	<u>1.99</u>	<u>2.08</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>12,659</b>	<b>13,135</b>	<b>14,414</b>	<b>15,831</b>	<b>17,293</b>	<b>1.9%</b>
<b>Total retail demand (sq.m)</b>	<b>197,802</b>	<b>205,240</b>	<b>225,231</b>	<b>247,363</b>	<b>270,213</b>	<b>1.9%</b>
<b>Demand growth (14-31)</b>					<b>72,411</b>	
<b>Estimated land take (ha)</b>					<b>14.5</b>	

\*Constant 2013/14 dollars & including GST  
\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.  
Source: MarketInfo; MacroPlan Dimasi

### 3.7 Gap assessment

MacroPlan Dimasi has undertaken a market ‘gap’ assessment of employment land on the Tweed LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Tweed LGA.

Key findings pertaining to the gap assessment are presented in Table 3.22.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	226.5	22.7	0.0	22.7	17.8	4.8
Industrial	258.7	114.0	285.0	399.0	13.6	385.4
Special Uses	245.0	72.5	0.0	72.5	3.4	69.1

Source: MacroPlan Dimasi

- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Tweed LGA (out to 2031).
- It is recognised that the Tweed LGA may need to plan for more business zoned land to accommodate demand post 2031 (as it is estimated there will only be 4.8 hectares available for development as at 2031).
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 4.8 hectares*
  - *Supply of industrial land will exceed demand by 385.4 hectares*
  - *Supply of special uses land will exceed demand by 69.1 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Tweed LGA.

- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Tweed LGA than is suggested by our demand assessment, particularly when catering for emerging businesses and industries.
- It is recognised that Tweed LGA will need to plan for more business zoned land to accommodate demand post 2031, as it is estimated there will only be 4.8 hectares available for development beyond 2031.
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Tweed LGA.

## 3.8 Conclusions

### 3.8.1 Commercial, Industrial and Special Uses

The Tweed LGA has been subject to relatively strong population growth, expanding by 6,906 persons in the five year period to 2011.

While observed across all age groups, growth was most pronounced in older residents (50 and above), accounting for 71% of LGA's total. This has been accentuated by a solid inflow of senior residents from Sydney and Interstate (predominately SEQ). Evidently, Tweed LGA is a popular destination for retirees.

The rapid expansion in senior citizens has elevated demand for health and social services. Already the largest employing industry in the LGA (17.8%), jobs growth in this industry outstripped that observed for the entire LGA. Over the five year period, increased demand for health services has supported the creation of an additional 933 jobs. We expect the lion's share of health workers are engaged at the Tweed Hospital (at some capacity).

Jobs growth was also observed in other service denominated industries. The Education and Training (+224 jobs), Accommodation and Food Services (+159

jobs) and Professional, Scientific and Technical Services (+119 jobs) industries all registered sizeable workforce gains. These industries benefit from a rising population. With the exception of the latter, these industries are important employers in the Tweed LGA (above 10%). Sustained population growth and the retention of young working adults are expected to support jobs growth in these industries over the forecast period.

Traditional industries such as manufacturing and construction have not shared the same success. Employing approximately 12.4% of the LGA's workforce, job losses in these industries have been significant. The completion of Pacific Highway upgrades and weak building activity has hindered progress in the construction industry. Increased competition from cheaper international alternatives has resulted in factory closures and a smaller manufacturing workforce.

The high Australian Dollar has made international travel more affordable. An increase in international travel patronage has been at the expense of the domestic tourism market. Popular tourist destinations along NSW's coast have not immune to this trend.

Notably, benefits associated with tourist expenditure support a wide range of industries (and therefore jobs). Weaker domestic travel volumes has been reflected in job reductions in Retail Trade (-203), as well as Arts and Recreation Services (-44) in the Tweed LGA. While there has been some growth in Accommodation and Food Services, the majority of this has come from increased local spending, and therefore is relatively contained within the food services component.

Key economic and demographic drivers which are expected to influence the Tweed LGA include:

- DPE projections suggest population growth will remain solid over the forecast period, averaging 1.1% per annum out to 2031.
- Growth in 65+ residents is expected to increase significantly, outstripping gains in working age cohorts.

- The Australian Dollar is expected to revert back to long term average levels.
- Less price competition in the international aviation market
- Completion of Pacific Highway upgrades
- These trends are implied in our employment projections
- Ageing to support elevated demand for health and social services – further expansion in the Health Care and Social Assistance workforce and demand for commercial and special use floorspace.
- A depreciating Australian dollar and less price competition amongst international carriers will result in improved domestic travel volumes – supporting jobs growth in Accommodation and Food Services and Retail Trade, and therefore commercial and retail provision.
- A larger residential population is expected to support more residential building activity and greater consumption of local goods and services – evidenced by jobs growth in Education and Training, Professional, Scientific and Technical Services, Retail Trade and Construction and increased demand for commercial, special use and industrial premises.
- Upgrades to the Pacific Highway improving access to new interstate and regional markets – reflected by job creation in Transport, Postal and Warehousing and demand for industrial floorspace.

A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises. As such, our demand projections indicate **60,010–80,050 sq.m of commercial, 72,411 sq.m of retail, 69,820–93,080 sq.m of industrial** and **57,860–77,160 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **2.9–3.8 hectares of commercial, 14.5 hectares of retail, 11.6-15.5 hectares of industrial** and **2.9–3.9 hectares of special uses** land will be required by 2031.



Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Tweed LGA (out to 2031).

It is recognised that the Tweed LGA may need to plan for more business zoned land to accommodate demand post 2031 (as it is estimated there will only be 4.8 hectares available for development as at 2031). It is estimated:

- *Supply of business land will exceed demand by 4.8 hectares*
- *Supply of industrial land will exceed demand by 385.4 hectares*
- *Supply of special uses land will exceed demand by 69.1 hectares*

Local environmental and other general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Tweed LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Tweed LGA.

It is recognised that Tweed LGA will need to plan for more business zoned land to accommodate demand post 2031, as it is estimated there will only be 4.8 hectares available for development post 2031. This can be achieved through the rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood).

### **3.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Tweed LGA:

- The Tweed Shire has a well-established retail/commercial centres hierarchy that services the existing residents and tourists, reasonably well. There are no regional shopping centres (e.g. Pacific Fair or Robina Town Centre that include

department stores). Retail facilities on the Gold Coast would have a strong competitive influence on the potential for larger, regionally oriented shopping facilities at Tweed. But this is not to say that centres like Tweed City could not become regional shopping centres in scale/function in the future.

- Future population growth is expected to be relatively strong, averaging about 1.1% per annum over the period to 2031. This population growth (coupled with tourist growth) translates to retail floorspace demand growth equivalent to about 72,411 sq.m (a 37% uplift) by 2031.
- By 2031, the Tweed LGA will support a resident population in the order of 109,000 persons, with a significant proportion of the future growth in the medium to longer term expected to be accommodated within the Cobaki Lakes growth area, Tweed West region (within the Tweed urban area) and around Casuarina/Kings Forest along the coast.
- Existing retail demand is estimated at 197,800 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 5.66 million sq.m. By 2031, estimated retail demand is expected to reach 270,213 sq.m. However we estimate net leakage of about 10% beyond the LGA, resulting in net demand of about 178,000 sq.m, increasing to 243,200 sq.m by 2031.
- Our preliminary analysis tends to indicate that the existing land stock across the municipality will broadly be sufficient to support the future retail demand growth across the LGA, however, in order to provide reasonable flexibility to meet demand across all parts of the municipality, there is likely to be some requirement for additional land to be identified for retail/commercial employment uses.
- Additional convenience related retail floorspace is likely to be provided in new residential growth areas such as Cobaki and Kings Forest, and we support the designation of business zoned land in these locations. The indicative concept plans for Cobaki Lakes indicate around 11,500 sq.m of retail and commercial floorspace in this location. We support this allocation.
- New centres have been identified in the Tweed West region (urban area), where new residential communities are expected to establish. These will be

small scale in nature but will absorb the future local convenience demand in this area.

- A limited proportion/volume of future residential growth is expected to occur inland, around Murwillumbah and other locations, and we do not consider that additional future retail floorspace is warranted in these locations.
- Tweed Shire Council supports the future development of retail facilities in the Tweed CBD and Tweed South, strengthening this area as a Major Regional Centre. We support additional expansions/upgrades, and new retail facilities within the existing business zoned land in these localities as the land is generally low density, and under-utilised.

## Section 4: LGA Analysis - Byron

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Byron LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Byron LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Byron LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from the DP&E and Byron Shire Council.

### 4.1 Key facts, findings and take-outs

#### 4.1.1 Population growth

- Between 2006 and 2011, population growth in the Byron LGA was negligible – averaging just 0.4% per annum.
- Despite an increase in the number of 50+ persons, a reduction in working age residents has constrained population growth in the Byron LGA.

- Over the five year period to 2011, net migration into Byron LGA totalled 820 persons, underpinned by an inflow from persons who previously lived overseas.
- DPE projections suggest population growth will improve (0.8% per annum) over the forecast period. The 65+ age cohort is earmarked for rapid expansion over the forecast period.

#### 4.1.2 Employment trends

- As at 2011, the Byron LGA supported 10,945 jobs (entailing 6% of the North Coast workforce).
- There is an overt connection between employment prospects and tourism in the Byron LGA.
- Between 2006 and 2011, it is estimated 115 additional jobs had been generated.
- Jobs growth was dominated by the Accommodation and Food Services industry (+144 jobs) over the five year period to 2011.
- Nine industries incurred outright jobs losses, the largest two being Construction (-167) and Manufacturing (-118).

#### 4.1.3 Employment land

- In Byron LGA, there are 290.5 hectares of land zoned for urban employment purposes – comprising of 27.8% Business, 22.7% Industrial and 49.6% Special Uses.
- Relative to the 2006-2011 period (+23 per annum), the number of jobs in the Byron LGA is projected to rise by 51 new jobs per annum between 2011 and 2031.
- An increase in jobs is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises. As such, our estimates of demand indicate **21,900–29,240 sq.m of commercial, 27,061 sq.m of retail, 37,870–50,520 sq.m of industrial**

and **11,740–15,640 sq.m of special use** of floorspace will be required by 2031.

- Having regard for average applied FSRs in Byron LGA, our estimates of demand indicate **2.7-3.7 hectares of commercial, 5.4 hectares of retail, 4.9-6.5 hectares of industrial** and **2.3-3.1 hectares of special uses** will be required between 2011 and 2031.
- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Byron LGA. As at 2031, it is estimated:
  - *Supply of business land will exceed demand by 1.1 hectares*
  - *Supply of industrial land will exceed demand by 22 hectares*
  - *Supply of special uses land will exceed demand by 7.7 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Byron LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Byron LGA than otherwise suggested by our land assessment, particularly for emerging businesses and industries.
- It is recognised that the Byron LGA will need to plan for more business zoned land to accommodate commercial and retail demand post 2031 (as it is estimated there will only be 1.1 hectares available as at 2031).
- Some demand for commercial and retail floorspace could be accommodated at the West Byron Urban Release Area, which includes some B1 Neighbourhood Centre and B4 Mixed Use land in its master plan.

- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent another practical approach to delivering more ‘business’ land in Byron LGA.

## 4.2 Literature review

The Byron Bay Community Economic Strategy and Action Plan 2011–2020 was prepared by Council to plan for future economic viability and employment within Byron Bay. The strategy sets out key focus areas and action plans to assist Council in delivery and implementation. The West Byron Bay Urban Release Area – Retail and Commercial Demand Study 2010 was prepared by Hill PDA to investigate the potential of the site to cater for retail and commercial land uses.

The following key points are noted in relation to Byron Bay from the relevant documentation:

- The Byron Bay and Mullumbimby Town Centres are identified as the key centres in the FNCRS, and they are supported by several inland and coastal villages.
- Tourism is the major industry of the region, but is expected to remain flat affecting many industries such as retail, accommodation, food and transportation.
- There is a high rate of small business being home based business or owner operated businesses in Byron Bay.
- The strategy outlines the need to develop a long term employment land strategy for Byron Bay.
- A library, hospital and sports and cultural complex as well as town centre upgrades have been identified as priorities for the Byron LGA in the Strategy.
- The Study by Hill PDA outlines there is a demand for retail floorspace in the Ewingsdale Trade area to 2020 of 12,896 sq.m. It details that Byron Bay West Shopping fair meets the needs of current and future (2020) residents of the trade area.

- The Study found that in the West Byron Urban Release area there is opportunity for small neighbourhood centres and possibility for tourism and light industry.
- The current NSW budget has identified upgrades for the Byron Bay Hospital, in keeping with the actions of the Community and Economic Strategy. A planning proposal to accommodate seniors housing and mixed use retail/commercial development has recently been exhibited. If this is approved, the site creates an additional 0.3 ha of employment floorspace.

### 4.3 Socio-demographic trends

#### 4.3.1 Population change

- According to ABS ERP figures, Byron LGA resident population grew by 587 persons over the five years to 2011, resulting in a total population of 30,712 persons.

<b>Year</b>	<b>Estimated Resident Population</b>	<b>Total Change (persons)</b>
2001	29,453	
2006	30,125	672
2011	30,712	587

*Source: ABS*

- Consistent with national trends, the number of aged persons aged 50 and above increased considerably over the five years to 2011, with persons aged 50-64 increasing by 1,113 and persons aged 65+ increasing by 541.
- A reduction in working aged residents (20-49 years) has constrained overall population growth over the analysed period.



**Table 4.2**  
Population By Age (persons) - Byron Bay LGA

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	7,831	7,403	-428	24%
20-34	4,827	4,553	-274	15%
35-49	7,496	7,131	-365	23%
50-64	6,459	7,572	1,113	25%
65+	3,512	4,053	541	13%
<b>Total</b>	<b>30,125</b>	<b>30,712</b>	<b>587</b>	<b>100%</b>

Source: ABS

#### 4.3.2 Migration movements

- Inward and outward movements for the Byron LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).
- Over the five years to 2011, net migration into Byron LGA totalled 820 persons.
- A large share of the net migration gain resulted from a strong inward movement from overseas (1,173 persons).
- By age, there was a net migration outflow of persons aged 20-34. We believe limited employment opportunity and diversity underscored this movement.
- There was a strong net gain from persons aged 35-49 (718 persons).

**Table 4.3**  
Net Migration by Age - Byron LGA

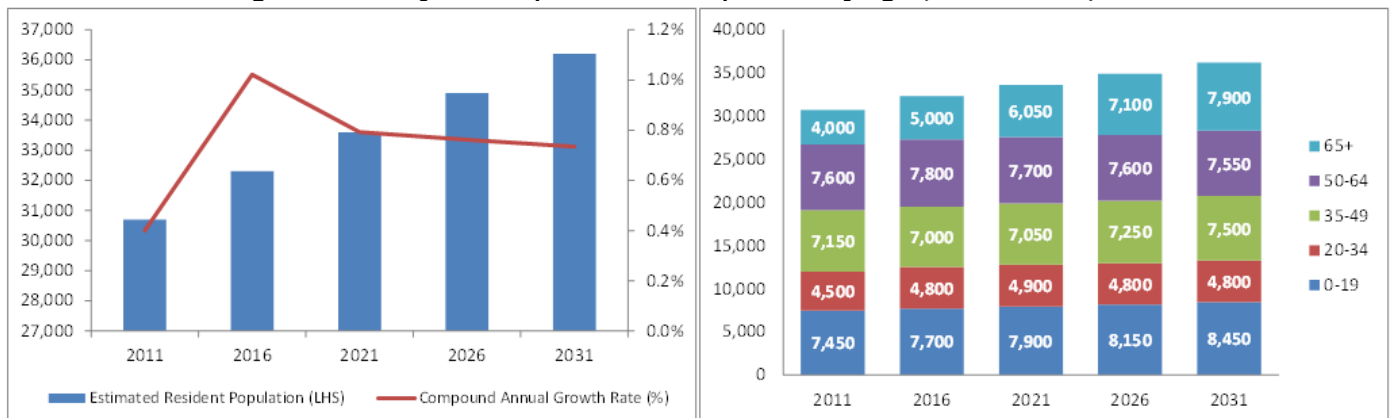
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	-154	-161	-197	-188	-89	-789
Sydney	62	-25	330	153	48	568
Regional NSW	104	71	60	-12	27	250
Interstate	-64	-478	170	33	-43	-382
Overseas	191	479	355	114	34	1,173
<b>Total Net Migration</b>	<b>139</b>	<b>-114</b>	<b>718</b>	<b>100</b>	<b>-23</b>	<b>820</b>

Source: ABS

### 4.3.3 Population projections

- According to DP&E projections, the Byron Bay LGA population is projected to expand to 36,200 persons by 2031.
- It is anticipated the population growth will average 275 persons per annum over the 2011 to 2031 period.

**Figure 1. Projected Population and Population by Age (2011 to 2031)**



Source: ABS, DP&E, MacroPlan Dimasi

- Over the twenty year period, population growth is projected to be highest amongst persons aged 65+. This cohort is projected to expand to 7,900 by 2031, a result of an additional 3,900 persons in the age cohort.
- Growth in persons aged 50-64 is projected to be negative, with a net reduction of -50 persons anticipated by 2031.

### 4.3.4 Labour force status

- Of all residents living in Byron LGA, around 82% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 62% i.e. 13,793 of 22,342 residents.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking working).

- The Byron LGA's labour force composition resembles the North Coast's employment profile (92% employed and 8% unemployed for the North Coast).

**Table 4.4**  
**Labour Force Status by Age (number) - Byron LGA**

Age Cohort	Employed*	Unemployed	Labour Force	Not in LF	Total
15 - 19	596	137	733	863	1,596
20 - 29	1,600	211	1,811	489	2,300
30 - 39	2,426	221	2,647	832	3,479
40 - 49	3,323	273	3,596	855	4,451
50 - 59	3,383	259	3,642	1,381	5,023
60 - 69	1,157	66	1,223	1,914	3,137
70 - 79	131	0	131	1,225	1,356
80 - 84	7	0	7	495	502
85+	3	0	3	495	498
<b>Total</b>	<b>12,626</b>	<b>1,167</b>	<b>13,793</b>	<b>8,549</b>	<b>22,342</b>

*Source: Census of Population and Housing (2011)*

#### 4.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are employed within the boundaries of the Byron LGA.
- According to Census data, around 67.6% of Byron's employed residents worked within the LGA.
- The remaining 33.4% of working residents travel either to other North Coast LGAs (15.2%) or locations outside the North Coast (17.2%) for work.
- Of working residents who travelled to other North Coast LGA, popular workplace destinations include Lismore (5.4%), Ballina (5.6%) and Tweed (3.9%) LGAs.

**Table 4.5**  
**Job Containment - Byron LGA**

	<b>Value</b>
Working residents	12,449
<u>Place of Work (number)</u>	
Byron	8,416
North Coast LGAs (ex. Byron)	1,895
Outside North Coast	2,138
<b>Total</b>	<b>12,449</b>
<u>Job Containment (%)</u>	
Byron	67.6%
North Coast LGAs	15.2%
Other	17.2%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Job containment by industry classification for Byron LGA is presented in the next table.
- Relative to the all industries average (67.6%) for Byron LGA, ten industries achieved higher job containment, with five industries registering containment of 80% or greater.
- Industries which typically trade to a localised market such as Retail Trade and Rental, Hiring and Real Estate Services achieved high job containment rates in Byron LGA.
- Of all industries, Rental, Hiring and Real Estate Services achieved the highest rate of containment (86.5%) in 2011.
- Containment was also high in traditional industries such as Manufacturing and Agriculture, Forestry and Fishing.

Table 4.6  
Job Containment by Industry - Byron LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	86.5%	5.2%	8.3%	100.0%
Accommodation and Food Services	84.4%	5.9%	9.8%	100.0%
Retail Trade	81.1%	9.5%	9.4%	100.0%
Wholesale Trade	80.8%	7.4%	11.8%	100.0%
Other Services	80.3%	7.9%	11.8%	100.0%
Manufacturing	79.2%	8.8%	12.0%	100.0%
Agriculture, Forestry and Fishing	77.0%	8.5%	14.5%	100.0%
Professional, Scientific and Technical Services	76.9%	9.4%	13.7%	100.0%
Arts and Recreation Services	70.5%	8.0%	21.5%	100.0%
Electricity, Gas, Water and Waste Services	68.1%	13.9%	18.1%	100.0%
<b>Across all industries</b>	<b>67.6%</b>	<b>15.2%</b>	<b>17.2%</b>	<b>100.0%</b>
Information Media and Telecommunications	66.7%	13.9%	19.4%	100.0%
Transport, Postal and Warehousing	65.3%	10.8%	23.9%	100.0%
Financial and Insurance Services	61.7%	21.9%	16.3%	100.0%
Administrative and Support Services	57.1%	8.1%	34.8%	100.0%
Education and Training	53.4%	33.2%	13.4%	100.0%
Health Care and Social Assistance	52.7%	33.1%	14.2%	100.0%
Construction	48.6%	7.8%	43.6%	100.0%
Public Administration and Safety	43.6%	39.8%	16.5%	100.0%
Mining	26.7%	10.0%	63.3%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

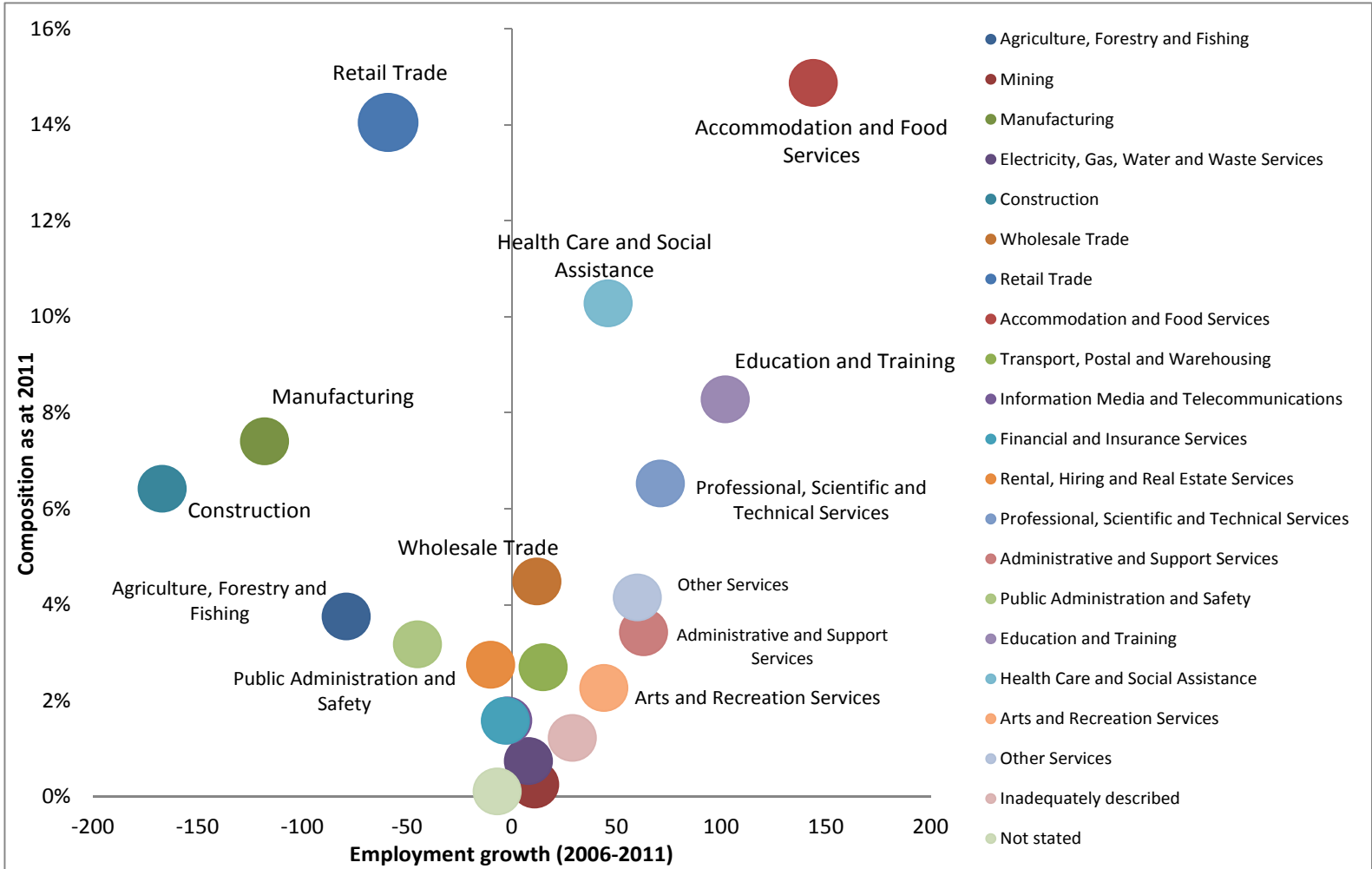
## 4.4 Employment and labour market trends

### 4.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Byron LGA and identify key emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Byron LGA supported 10,945 jobs, accounting for around 6% of total jobs in the North Coast region.
- The employment profile of the Byron LGA displays a pronounced connection with tourism. For example, persons employed in the Accommodation and Food Services industry account for 14.9% of jobs, considerably above the North Coast average of 9.7%. Similarly, Retail Trade is the second largest employing industry (14.0%).

- The LGA also has a strong link to 'service' industries, which is also synonymous with a region anchored by tourism.
- In comparison to the North Coast region average, fewer persons are employed in Health Care and Social Assistance in the Byron LGA – an outright difference of 6.2%.
- Over the five year period to 2011, 115 new jobs were created in the Byron LGA.
- In line with the tourism-employment association, jobs growth over the five years to 2011 was dominated by the Accommodation and Food Services industry (+144 jobs).
- Education and Training and Professional, Scientific and Technical Services industries experienced the next largest increase to employment over the period, with 102 and 71 job additions respectively.
- There were nine industries that recorded outright losses. The labour-intensive industries of Construction and Manufacturing experienced the largest contractions (-167 jobs and -118 jobs respectively).
- Looking ahead, greater investment and support is required for health services, particularly given the region's rapid rate of ageing.
- Moreover, as both domestic and international visitation to Byron LGA rises, it is expected that there will be solid employment growth in the future.

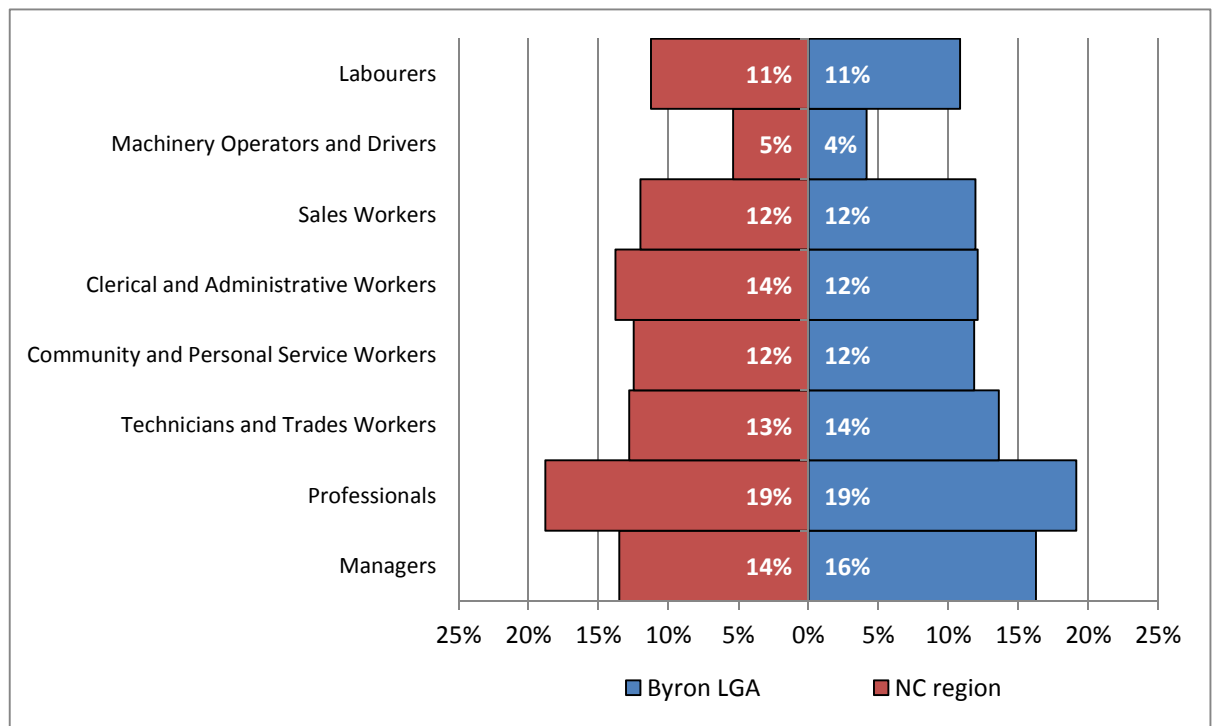
Figure 2. Employment composition and growth by industry, Byron LGA



#### 4.4.2 Occupation profile

- As at Census 2011, the largest employing occupation was 'Professionals', accounting for 19% of jobs in Byron LGA.
- The occupation profile of the Byron LGA is almost identical to the North Coast average, with the only notable difference coming from a higher representation of 'Managers'.

**Figure 3. Occupation Composition (2011)**



Source: ABS, MacroPlan Dimasi

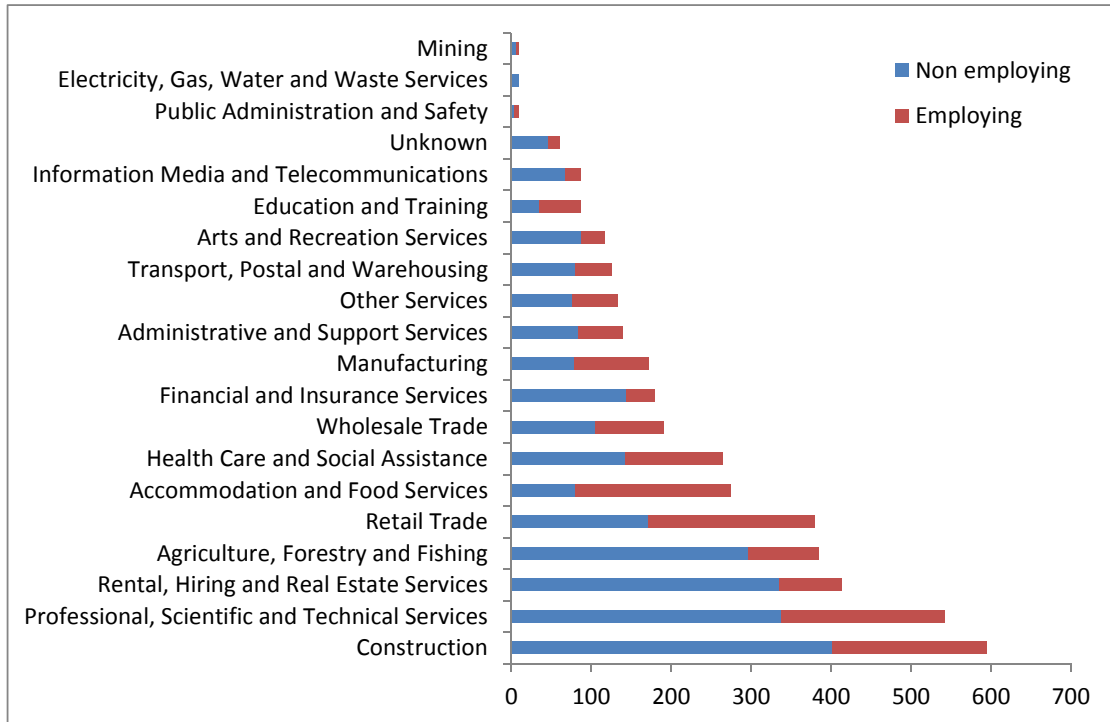
#### 4.4.3 Business composition & change

- As at June 2011, there were 4,171 businesses operating within the Byron LGA, with 62% being non-employing/sole trading businesses.
- Consistent with the broader North Coast region, businesses in the Construction industry account for the majority (595 in total). The next two industries with the most businesses were Professional, Scientific and Technical Services (542 businesses) and Rental, Hiring and Real Estate Services (413 businesses).



- Of businesses that employ, Retail Trade had the most (208 businesses).
- Representation in the Health Care and Social Assistance industry is moderate with 122 employing businesses. Notably, there are six that employ between 20 and 199 (e.g. the Byron District Hospital).

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, business growth within the Byron LGA occurred mainly in the non-employing cohort (+139 businesses).
- In contrast, the number of employing businesses contracted by 58.
- By industry, Rental, Hiring and Real Estate Services and Professional, Scientific and Technical Services experienced the greatest growth in business numbers – each increasing by 28 businesses.
- The contraction in business numbers was largest within Manufacturing (-20 businesses) and Accommodation and Food Services (-18 businesses).

**Table 4.7**  
**Business Composition and Change - Byron Bay LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	13	9	22
Retail Trade	14	-17	-3
Accommodation and Food Services	-7	-11	-18
Education and Training	-3	-4	-7
Construction	-6	0	-6
Public Administration and Safety	-3	9	6
Manufacturing	-12	-8	-20
Professional, Scientific and Technical Services	22	6	28
Other Services	8	-4	4
Transport, Postal and Warehousing	3	-12	-9
Agriculture, Forestry and Fishing	23	-25	-2
Administrative and Support Services	12	5	17
Wholesale Trade	14	-9	5
Rental, Hiring and Real Estate Services	15	13	28
Financial and Insurance Services	23	-10	13
Arts and Recreation Services	-3	0	-3
Electricity, Gas, Water and Waste Services	9	-3	6
Information Media and Telecommunications	15	5	20
Mining	3	0	3
Not Classified	-1	-2	-3
<b>Total</b>	<b>139</b>	<b>-58</b>	<b>81</b>

*Source: ABS*

#### 4.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- As at 2011, 38% of Byron's population was aged 50 years or above. Consequently, retirement in the local workforce will be high over the next 20 years. In this environment, promoting job opportunities for younger residents should be encouraged to supplement this labour 'gap'.
- Over the ten years to 2011, employment growth was dominated by the Accommodation and Food Services – due to Byron's association with tourism.
- Concurrently, traditional primary industries such as Construction, Manufacturing and Agriculture, Forestry and Fishing have, however, had a reduced share of employment within the LGA. This shift from traditional primary industries has in turn diversified the local economy, making way for higher-order industries such as Professional, Scientific and Technical Services

and population-denominated industries such as Education and Training and Health Care and Social Assistance.

- Tourism plays an important role in Byron's economy. The promotion of tourism related employment should be encouraged, further strengthening its position as a major tourism hub on the NSW North Coast. This is expected to provide local employment opportunities for younger residents.
- Additionally, a greater emphasis on the Health Care and Social Assistance sector is encouraged to assist and support a growing senior population, as well as provide employment opportunities for younger professionals.

## 4.5 Employment Land Supply

### 4.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), the current stock of zoned land has been derived. The information presented in this assessment is based on the Byron Local Environmental Plan 2014.
- In the Byron LGA, there are three main employment land use categories, including Business, Industrial and Special Uses.
- The next table presents the full complement of urban employment land use zones, as well as the area of land assigned to each type.

Table 4.8  
Zoned Employment Land - Byron LGA

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	3.0	1%
	B2. Local Centre	51.0	20%
	B4. Mixed Use	17.7	7%
	B7. Business Park	8.9	4%
	<b>Total</b>	<b>80.6</b>	<b>32%</b>
Industrial	IN1. General Industrial	25.8	10%
	IN2. Light Industrial	40.0	16%
	<b>Total</b>	<b>65.8</b>	<b>26%</b>
Special Uses	SP2. Infrastructure	56.2	22%
	SP3. Tourist	47.8	19%
	<b>Total</b>	<b>104.0</b>	<b>42%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>250.5</b>	<b>100%</b>

Source: NSW Department of Planning and Environment (2014)

- In total, there are approximately 250.5 hectares of land zoned for employment purposes in the Byron LGA.
- Representing the largest allocation, approximately 42% of employment zoned land is dedicated to Special Uses, followed by Business (32%) and Industrial uses (26%).
- At 80.6 hectares, business zoned land represents the next largest group.
- Notably, there is approximately 19.7 hectares of land used by existing tourist caravan parks in Byron LGA. As this land is not zoned business, industrial or special uses, we have omitted it from this employment land assessment. However, we acknowledge that this use would support employment.
- Within the four designated business zones (B1, B2, B4, and B7), there is a significant allocation to B2 Local Centres (i.e. 51 hectares). The provision of B2 land includes 26.5 hectares in the Byron Bay town centre, including a substantial provision of strip retail and stand-alone Woolworths and Aldi supermarkets. The majority of the remaining B2 zoned land within the Byron LGA is located within the town centres of Mullumbimby (11.7 hectares), Bangalow (4.5 hectares) and the Brunswick Heads (4.6 hectares).













# Map 4.1

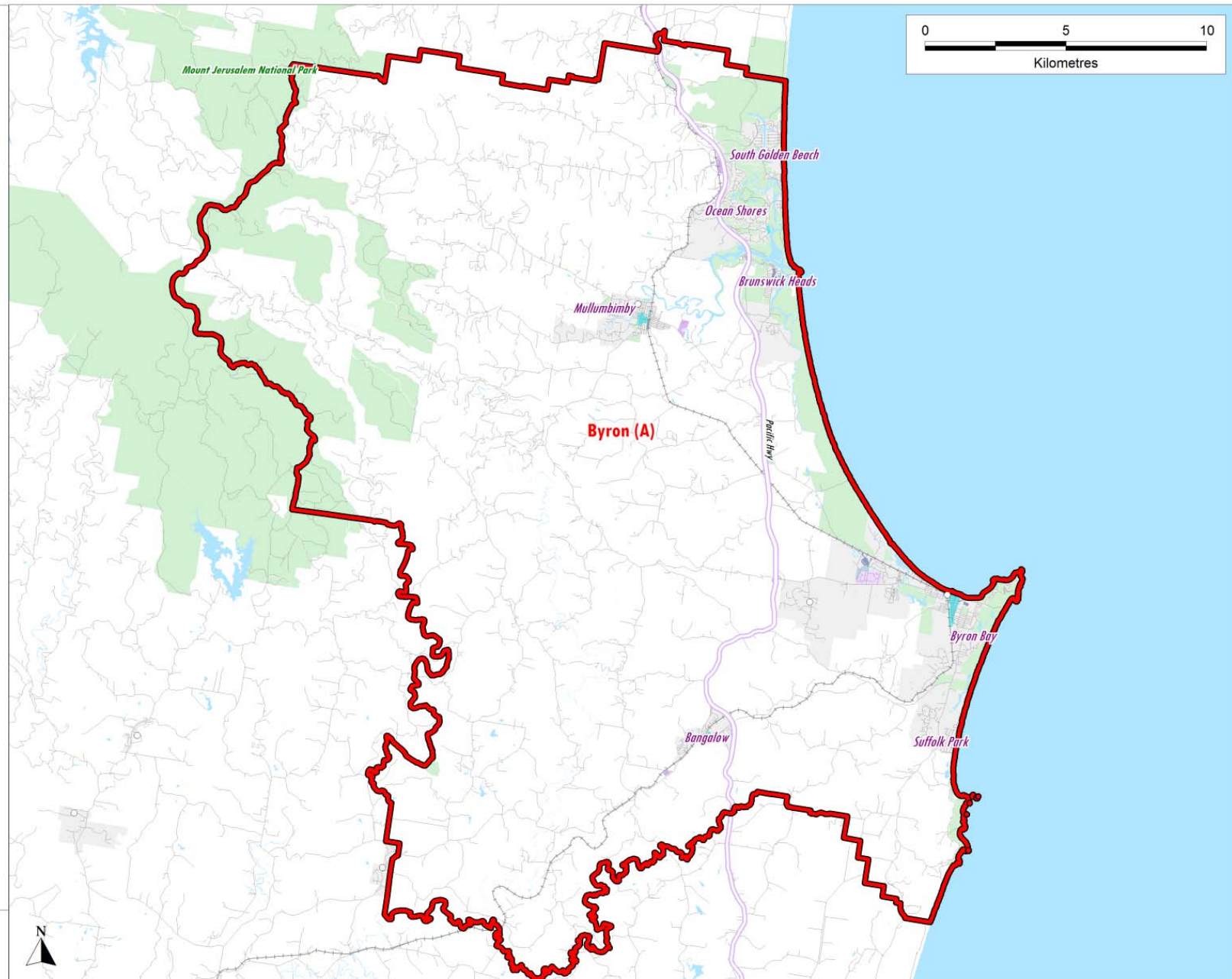
## Byron Shire Employment Land Zones

### Legend \*

 Byron Shire Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



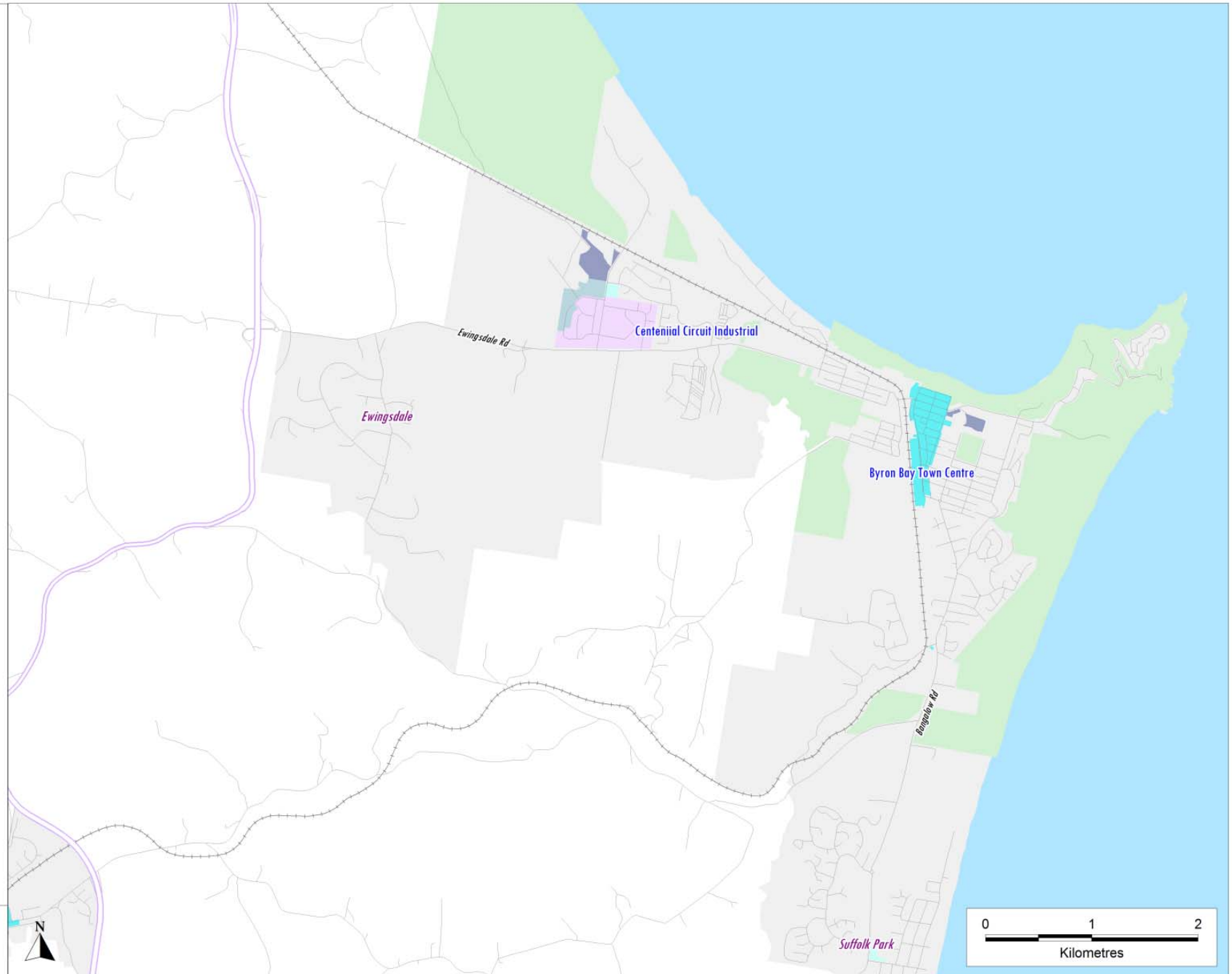
# Map 4.2

## Byron Bay Employment Land Zones

**Legend \***

**Land Zones**

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



#### 4.5.2 Industrial – Existing supply

- In Byron LGA, two specific industrial zones are used i.e. IN1 General Industrial and IN2 Light Industrial.
- Our research has revealed there is one established major industrial precinct in the Byron LGA (as presented below).

**Table 4.9**  
**Established Industrial Precincts - Byron LGA**

<b>Name</b>	<b>Total Area</b> (hectares)	<b>Developed</b> (hectares)	<b>Developed</b> (%)
Centennial Circuit Industrial Precinct	50.0	40.0	80%
Mullumbimby Industrial Precinct	7.3	4.4	40%
Billinudgel Industrial Precinct	6.0	5.4	90%
Bangalow Industrial Precinct	2.5	2.4	80%
<b>Total</b>	<b>65.8</b>	<b>52.2</b>	<b>79%</b>

Source: MacroPlan Dimasi

- Of the total, it is estimated that around 52.2 hectares or 79% of zoned industrial land is developed. Assuming there are no constraints, it is estimated there is potentially 13.6 hectares of zoned land available for future development.
- The **Centennial Circuit Industrial Precinct** encompasses 50 hectares of industrial land, 40 hectares of which is developed, meaning there is 10 hectares of land available for future development.
- Existing uses at this precinct include manufacturers (Byron Bay Cookie Company, McTavish Surfboards), self- storage, CSR Gyprock, wholesalers (e.g. Santos Trading), and other local orientated businesses (e.g. Bonnlee Printing, All Glass Byron Bay, Luxury Paints, etc.).



### 4.5.3 Industrial – Future supply

- Located 2.5 kilometres west of Byron Bay, the **West Byron Urban Land Release Area** is a 108 hectare Masterplanned development.
- Notably, this project also incorporates approximately 14 hectares of industrial land. It is scheduled to be complete in 10 to 15 years.

**Table 4.10**

**Future Industrial Precincts - Byron LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
West Byron Urban Release Area	14.1	10 - 20
<b>Total</b>	<b>14.1</b>	

*Source: MacroPlan Dimasi*

### 4.5.4 Retail & Commercial – Existing supply

The Byron LGA retail/commercial centres and bulky goods/homemaker retail facilities hierarchy are outlined on Map 4.3 and Map 4.4.

- The Byron LGA centres hierarchy generally consists of the following structure:
  - Byron Bay Town Centre
  - Mullumbimby Town Centre
  - Smaller scale coastal and inland villages (such as Bangalow, Ocean Shores and Suffolk Park)
- There are no significant retail shopping centres, no department stores or discount department stores located within the LGA. The closest higher order retail facilities are located at Ballina and Tweed.

#### **Byron Town Centre**

- The Byron Bay Town Centre is the primary retail and commercial activity centre in the Byron LGA, occupying around 47.1 ha of business zoned the land, of which 1.5 ha is B4 zoned land and 26.6 ha is B2 land.



- There are no major enclosed shopping centre facilities in the Byron Bay Town Centre. The retail provision generally consists of strip/street retailing, centred along Jonson Street, focussed on the tourist market and local convenience needs of the resident population. The town centre provides an unusually large provision of specialty/strip retail given there is no large supermarket or shopping centre anchor, including apparel, food catering, fresh food, retail services as well as pharmacies, newsagencies and the like. There is a relatively small Woolworths supermarket (2,254 sq.m), together with an Aldi supermarket in the main retail precinct. A new and larger (replacement) Woolworths supermarket is under construction adjacent to the existing store. In total there is an estimated 30,000 – 40,000 sq.m of retail floorspace in the town centre.
- The mix of non-retail floorspace consists of short-term accommodation, pubs, medical/health facilities, civic/community and business services.

#### **Mullumbimby Town Centre**

- The Mullumbimby Town Centre is the main inland town in the LGA, occupying around 12.5 ha of B2 zoned land as well as 2.7 ha of B4 zoned land.
- This is an estimated 7,000 sq.m of retail floorspace in the town, and includes the largest supermarket in the LGA (a 2,444 sq.m Woolworths) and an IGA supermarket. The town centre also provides a range of local oriented business services.

#### **Other centres/villages**

- There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:
- Sunrise Beach provides the Byron West Shopping Fair, a small retail facility that includes an IGA supermarket.
- Bangalow provides a small retail/commercial precinct anchored by a Foodworks supermarket, providing approximately 4,500 sq.m of retail floorspace.

- Ocean Shores includes a Coles supermarket anchored shopping complex providing around 5,500 sq.m of retail floorspace.
- There are small scale retail and commercial facilities at Suffolk Park and Brunswick Heads.








# Map 4.3

## Byron Shire Retail Provision

### Legend \*

 Byron Shire Boundary

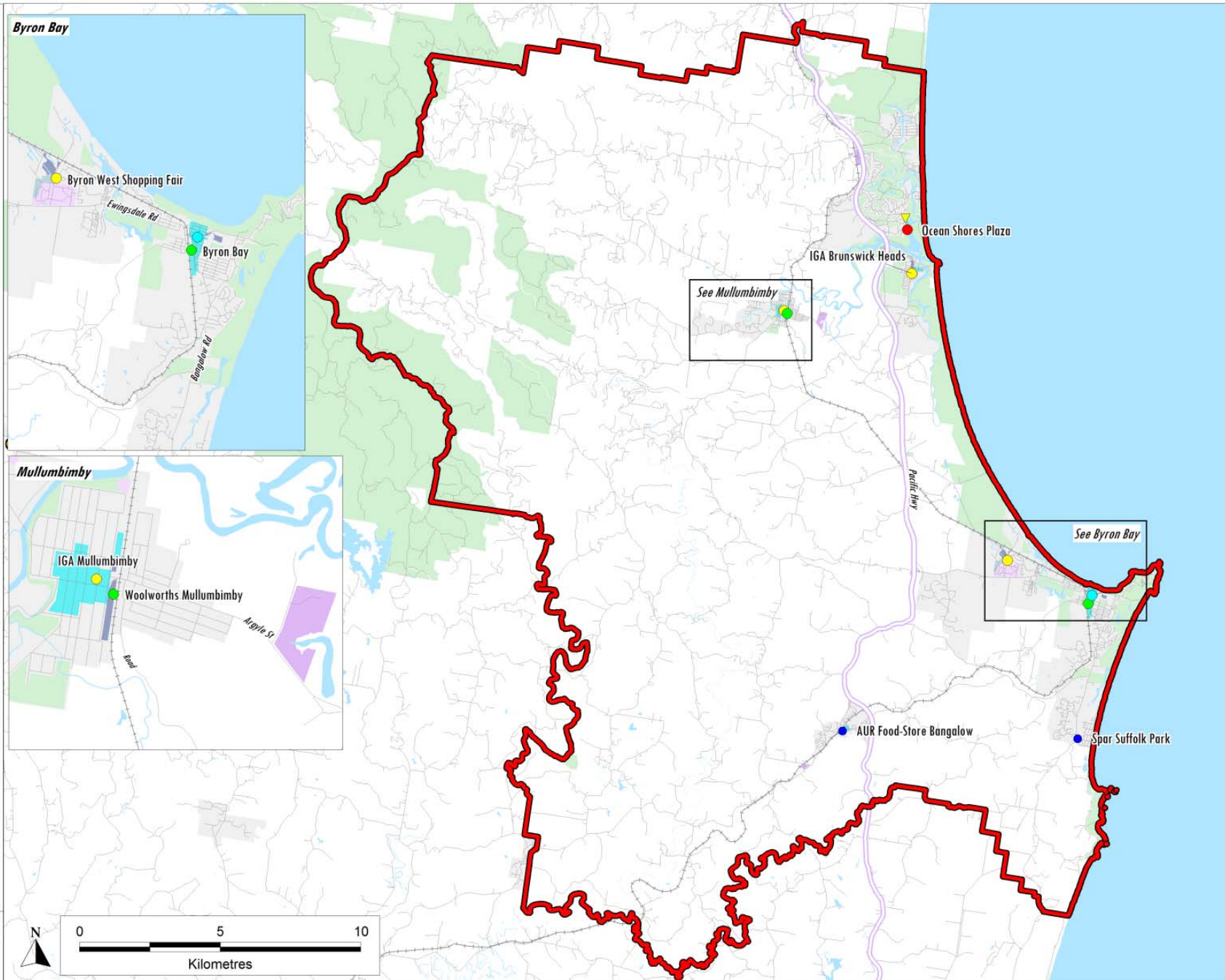
### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

### Retail Competition

-  Target Country
-  Woolworths
-  Coles/Bi-Lo
-  Aldi
-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)

*\* Hollow symbols indicate proposed stores*



# Map 4.4

## Byron Shire Bulky / Homemaker Goods Retailing

### Legend \*

 Byron Shire Boundary












### Bulky Goods Retailers

 Mitre 10

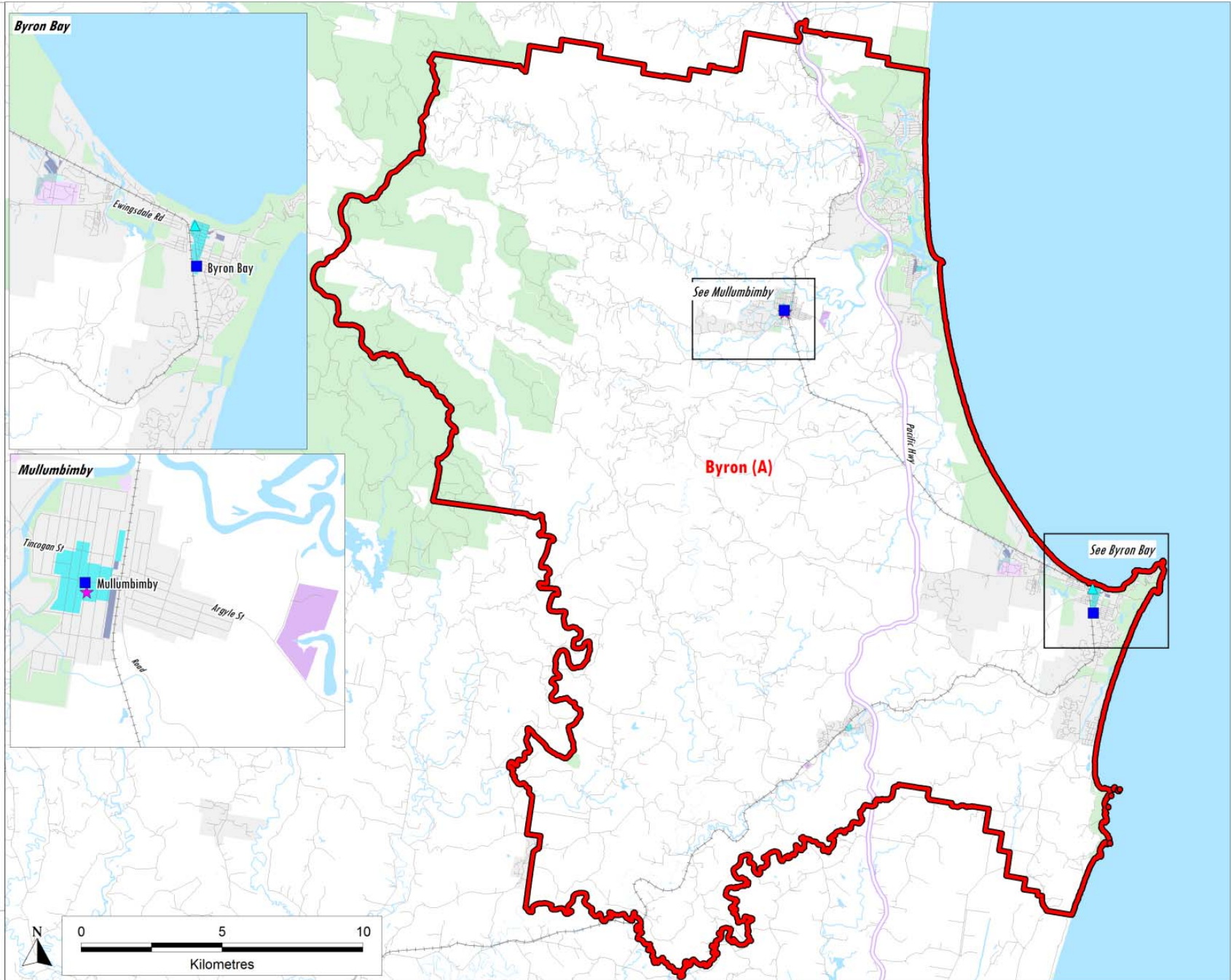
 Repco

 Betta Home Living

### Land Zones

 B1	 B7
 B2	 IN1
 B3	 IN2
 B4	 IN3
 B5	 IN4
 B6	

\* Hollow symbols indicate proposed stores





### **Business zoned land capacity for retail and commercial floorspace**

Table 4.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately 80.6 hectares of business zoned land within the Byron LGA, of which 3 ha is B1 zoned land and about 51 ha is B2 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is no B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts.
- There are also 26.6 ha of B4 and B7 zoned land across the LGA.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Byron LGA, to be in the order of 728,321 sq.m.
- There is no defined FSR for B7 zoned land in the Byron LEP 2014, we have therefore assumed an FSR of 1:1.
- We estimate that there is a net leakage from the LGA in the order of about 20%, given the relative size and mix of the retail offer compared with nearby Ballina, and indeed, Tweed to the north, in particular for higher order/bulky goods retailing. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 4.11**  
Byron LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1	3.0	0.5	15,171
Total B2	51.0	1.1	535,534
Total B4	17.7	0.5	88,500
Total B7*	<u>8.9</u>	1.0	<u>89,116</u>
<b>Total LGA</b>	<b>80.6</b>		<b>728,321</b>

\*Assumed FSR

Source: Byron LEP 2014, MapInfo; NSW Govt; MacroPlan Dimasi

#### 4.5.5 Retail & Commercial – Future supply

There are several proposed retail developments of significance within the Byron LGA. The developments most relevant to our analysis include:

- Construction is underway on a new Bunnings Warehouse in Byron Bay, expected to provide some 2,760 sq.m of bulky goods/homemaker floorspace by early 2015.
- Mercato on Byron is a proposed 2 storey shopping centre expected to provide some 4,265 sq.m of floorspace including a 3,800 sq.m supermarket on the ground floor, and specialty retail shops above. The development application is currently being assessed by Council, however if approved soon, the development is expected to be completed by late 2015.

#### 4.5.6 Special Uses – Existing supply

- Three specific Special Use categories are applied in Byron LGA.
- Classified roads, cemeteries, waste management facilities, water supply systems and some other purposes have been removed from our estimate of urban employment land.
- As a result the Special Uses category totals 104 hectares and includes education establishments (e.g. Southern Cross University), health services (Byron District Hospital), private colleges (e.g. School of Audio Engineering – SAE), wharf and boating facilities and tourism denominated facilities.

**Table 4.12**  
**Identified Special Use Sites - Byron LGA**

Name	Purpose
Southern Cross University	Educational Establishment
Byron District Hospital	Health Service Facility
School of Audio Engineering (SAE)	Private College

*Source: MacroPlan Dimasi*

- Of the total land classified as SP2 (56.2 hectares), significant facilities include the Byron District Hospital (0.5 hectares), as well as the Myocum Waste Facility (14.7 hectares).
- The Byron District Hospital, also classified as the Bryon Bay Community Health Centre has a total area of 0.5 hectares. We estimate that approximately 0.43 hectares of this site has been developed, allowing for a total of 0.07 hectares to be developed in the future.
- Significantly, there is 48 hectares of land zoned for tourism purposes.

#### 4.5.2 Special Uses – Future supply

- Within this category there is one planned project for the Byron LGA; the Byron Central Hospital.
- Once complete, the hospital is expected to include a 24-hour emergency service, 50 acute medical beds, low risk maternity services, x-ray/medical imaging facilities, 20 beds for mental health services and a day surgery.
- Jobs will be provided in construction during the early stages. Once complete there will be an increase in hospital and health related jobs in the LGA.

**Figure 5. Artists impression of the Byron Central Hospital**



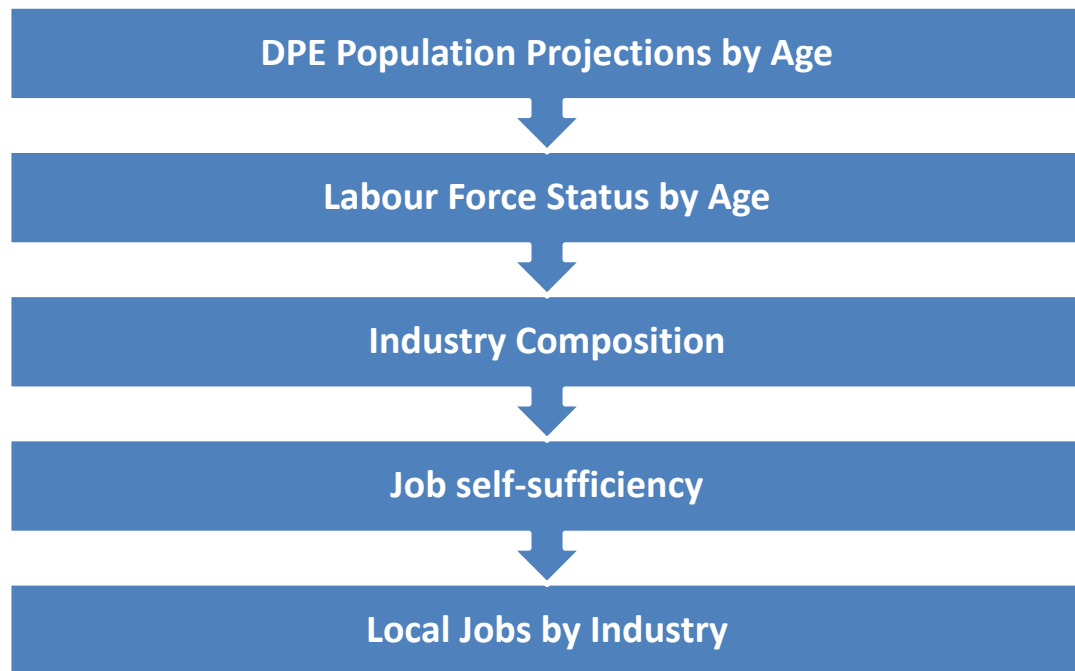
*Source: NSW Health (2014)*

## 4.6 Demand for employment land

### 4.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in the Byron LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of Byron LGA to generate employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Byron LGA.





- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

#### 4.6.2 Employment Projections

- Relative to the 2006-2011 period (+23 per annum), the number of jobs in the Byron LGA is projected to rise by 51 new jobs per annum between 2011 and 2031.
- Our projections indicate an increase of 491 jobs in the Byron LGA over the ten years to 2021. As at 2021, the Byron LGA is expected to entail 11,437 jobs.

- The rate of employment growth is expected to rise beyond 2021. Over the decade to 2031, 533 new jobs will be created in Byron LGA. As at 2031, the workforce is expected to support 11,969 jobs.
- By industry, employment growth is expected to be most pronounced within Accommodation and Food Services (+240), Health Care and Social Assistance (+229), Education and Training (+164) and Retail Trade (+156), owing to improved domestic and international visitation.
- Conversely, outright job losses is predicted for three industries, mainly in Manufacturing (-130) and Agriculture, Forestry and Fishing (-90).

**Table 4.13**  
Employment by Industry - Byron LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Accommodation and Food Services	1,627	1,761	1,867	240
Health Care and Social Assistance	1,125	1,260	1,354	229
Education and Training	906	1,000	1,070	164
Retail Trade	1,537	1,606	1,693	156
Professional, Scientific and Technical Services	714	764	835	121
Construction	702	724	805	103
Rental, Hiring and Real Estate Services	301	314	376	75
Transport, Postal and Warehousing	295	340	367	72
Wholesale Trade	491	519	559	68
Electricity, Gas, Water and Waste Services	81	98	126	45
Administrative and Support Services	375	393	411	36
Financial and Insurance Services	173	196	205	32
Mining	28	29	43	15
Other Services	454	458	467	13
Arts and Recreation Services	248	263	251	3
Information Media and Telecommunications	174	167	174	0
Public Administration and Safety	347	345	301	-46
Other*	146	71	62	-84
Agriculture, Forestry and Fishing	411	364	321	-90
Manufacturing	810	765	680	-130
<b>Total</b>	<b>10,945</b>	<b>11,437</b>	<b>11,969</b>	<b>1,024</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry. The following table entails the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 4.14**  
Industry and Land Use Conversion Matrix - Byron LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	40%	0%	60%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use type, as presented in Table 4.14.

**Table 4.15**  
Employment Additions by Land Use Type - Byron LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	2	3	15	26	0	0
Construction	2	8	20	73	0	0
Wholesale Trade	23	32	6	8	0	0
Retail Trade	66	82	3	4	0	0
Accommodation and Food Services	94	76	40	32	0	0
Transport, Postal and Warehousing	9	5	36	21	0	0
Information Media and Telecommunications	0	8	0	0	0	0
Financial and Insurance Services	23	9	0	0	0	0
Rental, Hiring and Real Estate Services	13	62	0	0	0	0
Professional, Scientific and Technical Services	50	71	0	0	0	0
Administrative and Support Services	18	18	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	9	7	0	0	84	63
Health Care and Social Assistance	54	38	0	0	81	56
Arts and Recreation Services	15	0	0	0	0	0
Other Services	4	9	0	0	0	0

Note: These figures may be subject to rounding

Source: MacroPlan Dimasi

### 4.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities present the average floorspace needed to accommodate new workers. These densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Byron LGA (presented in Table 4.16).

**Table 4.16**  
Indicative Employment Density by Industry and Land Use Type - Byron LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

Table 4.17  
Additional Floorspace by Industry under the Base Scenario (sqm) - Byron LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	270	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	70	110	3,760	6,400	0	0
Construction	70	240	2,940	10,970	0	0
Wholesale Trade	680	950	1,130	1,590	0	0
Retail Trade	2,630	3,300	480	610	0	0
Accommodation and Food Services	4,690	3,780	6,030	4,860	0	0
Transport, Postal and Warehousing	270	160	7,210	4,250	0	0
Information Media and Telecommunications	0	230	0	0	0	0
Financial and Insurance Services	580	230	0	0	0	0
Rental, Hiring and Real Estate Services	320	1,560	0	0	0	0
Professional, Scientific and Technical Services	1,240	1,780	0	0	0	0
Administrative and Support Services	460	450	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	370	280	0	0	4,220	3,170
Health Care and Social Assistance	2,170	1,500	0	0	4,870	3,380
Arts and Recreation Services	600	0	0	0	0	0
Other Services	150	370	0	0	0	0
<b>Total</b>	<b>14,300</b>	<b>14,940</b>	<b>21,570</b>	<b>28,950</b>	<b>9,090</b>	<b>6,550</b>

Source: MacroPlan Dimasi

- Under the Base Case scenario, it is estimated approximately **14,300 sq.m of commercial, 21,570 sq.m of industrial and 9,090 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **14,940 sq.m of commercial, 28,950 sq.m of industrial and 6,550 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in the following table.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better representation of the typical actions and decisions made by businesses.

**Table 4.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Byron LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	200	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	50	90	2,820	4,800	0	0
Construction	50	180	2,200	8,220	0	0
Wholesale Trade	510	720	850	1,190	0	0
Retail Trade	1,970	2,470	360	460	0	0
Accommodation and Food Services	3,520	2,830	4,520	3,640	0	0
Transport, Postal and Warehousing	200	120	5,410	3,180	0	0
Information Media and Telecommunications	0	170	0	0	0	0
Financial and Insurance Services	430	170	0	0	0	0
Rental, Hiring and Real Estate Services	240	1,170	0	0	0	0
Professional, Scientific and Technical Services	930	1,330	0	0	0	0
Administrative and Support Services	340	340	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	280	210	0	0	3,160	2,380
Health Care and Social Assistance	1,620	1,130	0	0	3,660	2,540
Arts and Recreation Services	450	0	0	0	0	0
Other Services	110	270	0	0	0	0
<b>Total</b>	<b>10,700</b>	<b>11,200</b>	<b>16,180</b>	<b>21,690</b>	<b>6,820</b>	<b>4,920</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicates **10,700 sq.m of commercial, 16,180 sq.m of industrial and 6,820 sq.m of special use** floorspace demand will materialise by 2021.
- Under the alternative scenario, demand is anticipated to rise relative to the prior ten year period. Over the ten years to 2031, an additional **11,200 sq.m of commercial, 21,690 sq.m of industrial and 4,920 sq.m of special uses** of floorspace is expected to eventuate.

#### 4.1.1 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Byron LGA has been extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed applied FSRs in Byron LGA include:
  - B1 Neighbourhood Centre 0.5: 1
  - B2 Local Centre 0.6-1.3: 1
  - B4 Mixed Use 0.5-0.6: 1
  - IN1 General Industrial 0.75: 1
  - IN2 Light Industrial 0.75-0.90: 1
  - SP2 Infrastructure 0.2-0.4: 1
  - SP3 Tourist 0.2: 1
- As such, a FSR of 0.8:1 has been applied across all business zones, 1:1 for industrial uses and 0.8: 1 for Special Uses (based on the North Coast average).

**Table 4.19**

Demand for Employment Land (2031) - Byron LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	2.2 - 2.9	0.8	2.7 - 3.7
Industrial	3.8 - 5.1	0.8	4.9 - 6.5
Special Uses	1.2 - 1.6	0.5	2.3 - 3.1

Source: MacroPlan Dimasi

- Based on derived floorspace requirements and applied FSRs, MacroPlan Dimasi estimates around **2.7–3.7 hectares of commercial**, **4.9–6.5 hectares of industrial** and **2.3–3.1 hectares of special uses** land will be required by 2031.

#### 4.6.5 Demand for retail floorspace

The drivers of future demand for retail floorspace in the Byron LGA are summarised below:

- Population growth – which is expected to be moderate, growing at an average of 0.8% per annum to 2031 (a net increase of 17.9% or 5,500 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 4.20 outlines the retail floorspace expenditure and equivalent retail floorspace demand generated by the population within the Byron LGA, presently, and at five yearly intervals to 2031. This table also details the demand generated by the annual tourist/visitor market, for the year to March 2014, and shows the following:

- The residential population of the Byron LGA generates approximately 69,300 sq.m of retail floorspace demand (at 2014), which is equivalent to a provision rate of about 2.2 sq.m per capita.



- Total residential retail floorspace demand is estimated to grow by about 27,061 sq.m by 2031, an increase of about 31% over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about 23,510 sq.m, and is expected to increase by about 5,567 sq.m by 2031.
- Total retail demand growth equates to an equivalent land requirement of 5.4 hectares, assuming an average floorspace ratio (FSR) of 0.5.

Table 4.20

Byron LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2026\*

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	31,630	32,250	33,650	35,000	36,200	0.8%
Tourism equiv. pop	9,103	9,281	9,684	10,073	10,418	0.8%
<b>Retail exp. (\$M)</b>						
Food & liquor	182	189	206	224	243	1.7%
Food catering	51	53	58	64	71	2.0%
Apparel	37	38	41	43	46	1.2%
Household	75	77	82	87	92	1.2%
Leisure	20	21	22	24	26	1.5%
General	33	35	38	42	46	1.9%
Retail services	<u>12</u>	<u>12</u>	<u>13</u>	<u>14</u>	<u>15</u>	<u>1.5%</u>
<b>Total</b>	<b>411</b>	<b>424</b>	<b>459</b>	<b>499</b>	<b>538</b>	<b>1.6%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	20,267	20,978	22,848	24,924	27,041	1.7%
Food catering	8,454	8,794	9,698	10,710	11,765	2.0%
Apparel	6,794	6,963	7,398	7,871	8,331	1.2%
Household	24,988	25,608	27,207	28,950	30,640	1.2%
Leisure	3,338	3,438	3,699	3,985	4,270	1.5%
General	5,555	5,767	6,328	6,954	7,601	1.9%
Retail services	<u>1,981</u>	<u>2,040</u>	<u>2,195</u>	<u>2,365</u>	<u>2,534</u>	<u>1.5%</u>
<b>Total</b>	<b>69,275</b>	<b>71,545</b>	<b>77,499</b>	<b>84,091</b>	<b>90,769</b>	<b>1.7%</b>
<b>Floorspace per capita</b>	<b>2.19</b>	<b>2.22</b>	<b>2.30</b>	<b>2.40</b>	<b>2.51</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	9,103	9,281	9,684	10,073	10,418	0.8%
Floorspace per capita**	<u>1.97</u>	<u>2.00</u>	<u>2.07</u>	<u>2.16</u>	<u>2.26</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>17,943</b>	<b>18,531</b>	<b>20,073</b>	<b>21,780</b>	<b>23,510</b>	<b>1.6%</b>
<b>Total retail demand (sq.m)</b>	<b>87,218</b>	<b>90,076</b>	<b>97,572</b>	<b>105,871</b>	<b>114,279</b>	<b>1.6%</b>
<b>Demand growth (14-31)</b>					<b>27,061</b>	
<b>Estimated land take (ha)</b>					<b>5.4</b>	

\*Constant 2013/14 dollars &amp; including GST

\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.

Source: MarketInfo; MacroPlan Dimasi

## 4.7 Gap assessment

MacroPlan Dimasi has undertaken a market ‘gap’ assessment of employment land on the Byron LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Byron LGA.

- Key findings pertaining to our gap assessment are presented in Table 4.21.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	80.6	8.1	0.7	8.8	7.7	1.1
Industrial	65.8	13.6	14.1	27.7	5.7	22.0
Special Uses	104.0	10.4	0.0	10.4	2.7	7.7

Source: MacroPlan Dimasi

- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 1.1 hectares*
  - *Supply of industrial land will exceed demand by 22 hectares*
  - *Supply of special uses land will exceed demand by 7.7 hectares*
- Our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Byron LGA (out to 2031).
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Byron LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Byron LGA than otherwise suggested by our land assessment, particularly for emerging businesses and industries.
- It is recognised that the Byron LGA will need to plan for more business zoned land to accommodate commercial and retail demand post 2031 (as it is estimated there will only be 1.1 hectares available as at 2031).
- Some demand for commercial and retail floorspace could be accommodated at the West Byron Urban Release Area, which includes some B1 Neighbourhood Centre and B4 Mixed Use land in its master plan.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent another practical approach to delivering more 'business' land in Byron LGA.

## 4.8 Conclusions

### 4.8.1 Commercial, Industrial and Special Uses

- Between 2006 and 2011, population growth in the Byron LGA was negligible, averaging just 0.4% per annum over this period. A rise in the number of 50+ persons has been offset by a large reduction in working age residents.
- Weak population growth is reflected in minimum job additions for the region. Over the five years to 2011, just 115 additional jobs were created – equivalent to just 1.1% of the LGA's workforce as at 2011. Nine industries incurred job losses over this period.
- Synonymous with other North Coast locations, the Byron LGA is a popular location for travellers, particularly long-term international visitors. According to Census 2011, a net migration gain of 820 persons was recorded in the LGA over the five years 2011.
- However, overall visitation has receded. The high Australian Dollar has made international travel more affordable, supporting increased take-up by Australian households. The rise in international travel has been at the expense of the domestic market. Less visitation to the Byron LGA is reflected in jobs

losses in Retail Trade (-59 jobs) and Rental, Hiring and Real Estate Services (-10 jobs). Notably, after the Accommodation and Food Services industry, Retail Trade is the region's second largest employer.

- While the overall population growth for the region has been weak, expansion in 50+ residents has been solid. Over the five years to 2011, the number of persons in this age cohort increased by 1,654 persons. Ageing within the population has already translated into greater demand for health services. During this period, there were 46 jobs created in the Health Care and Social Care industry – the third large employing industry in the Byron LGA.
- Jobs growth was also observed in other service denominated industries. Accommodation and Food Services (+159 jobs) and Education and Training (+102 jobs) both incurred sizeable gains. Both these industries represent important employment generators in the Byron LGA (8% and above).
- There have been notable jobs losses in traditional industries such as manufacturing and construction. In the absence of major highway upgrades, residential construction has been limited, resulting in 167 job reductions. Strengthening competition from cheaper international manufacturers and a high Australian dollar have job losses in the manufacturing industry (-118 jobs).

Key economic and demographic drivers which are expected to influence the Byron LGA include:

- DPE projections suggest population growth will improve (0.8% per annum). However, the 65+ age cohort is set to experience rapid growth over the forecast period.
- The Australian Dollar is expected to revert back to long-term average levels.
- Less price competition in the international aviation market

These forces are implied in our employment projections:

- Ageing to support elevated demand for health and social services – further expansion in the Health Care and Social Assistance workforce (+269 by 2031) and demand for commercial and special use floorspace.
- A lower Australian dollar and less price competition amongst international carriers will result in improved visitation from domestic and international travellers– supporting jobs growth in Accommodation and Food Services and Retail Trade, and therefore commercial and retail provision.
- Sustained moderate population growth constraining demand in local service provision and building activity (low demand for new housing).
- An increase in jobs is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises.
- As such, our estimates of demand indicate **21,900–29,240 sq.m of commercial, 27,061 sq.m of retail, 37,870–50,520 sq.m of industrial and 11,740–15,640 sq.m of special use** of floorspace will be required by 2031.
- Based on derived floorspace requirements and applied FSRs, MacroPlan Dimasi estimates around **2.7–3.7 hectares of commercial, 4.9–6.5 hectares of industrial and 2.3–3.1 hectares of special uses** land will be required by 2031.
- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Byron LGA (out to 2031). It is estimated:
  - *Supply of business land will exceed demand by 1.1 hectares*
  - *Supply of industrial land will exceed demand by 22 hectares*
  - *Supply of special uses land will exceed demand by 7.7 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Byron LGA.

- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Byron LGA relative to that suggested in our land assessment, particularly for emerging businesses and industries.
- It is recognised that the Byron LGA will need to plan for more business zoned land to accommodate commercial and retail demand post 2031 (as it is estimated there will only be 1.1 hectares available as at 2031).
- Some demand for commercial and retail floorspace could be accommodated at the West Byron Urban Release Area, which includes some B1 Neighbourhood Centre and B4 Mixed Use land in its master plan.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent another practical approach to delivering more 'business' land in Byron LGA.

#### 4.8.2 Retail

We make the following preliminary comments in relation to retail market conditions within the Byron LGA:

- Future population growth is expected to be moderate, averaging about 0.8% per annum over the period to 2031, equating to an additional population of 5,500.
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 27,061 sq.m (a 15% uplift) by 2031, equating to a land requirement of about 5.4 hectares.
- Byron LGA does not provide a comprehensive retail hierarchy, of the likes of the surrounding LGAs of Ballina and Tweed. Indeed, these locations would serve the higher order retail needs of residents of the Byron, when they need to undertake 'sub-regionally' oriented shopping trips or homemaker/bulky goods type shopping.

- Mullumbimby Town Centre, with the relatively recent addition of a Woolworths supermarket a few years ago, means the surrounding residents in this area now have access to a quality convenience retail offer.
- Existing retail demand is estimated at 87,200 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 728,321 sq.m. However, estimated leakage of about 20% beyond the LGA to centres such as Tweed and Ballina, results in net demand of about 69,800 sq.m, increasing to about 91,400 sq.m by 2031.
- The Byron LGA supports a very large annual equivalent tourism population, equivalent to 30% of the permanent residential population. These tourists drive demand for the specialty strip/street retailing in the Byron Town Centre and support a vibrant functional food catering/entertainment offer.
- The existing resident population in Byron is the most affluent, and retail expenditure per capita is the highest, across the FNC region. There is a lack of full-scale supermarket facilities in the LGA, indeed, the largest supermarket is the 2,444 sq.m Woolworths supermarket at Mullumbimby. This situation may be addressed, to an extent, by the new Woolworths supermarket being developed in the car-park adjacent to the existing store in the Byron Bay Town Centre.
- Having regard to the capacity estimated to be available within the existing centres, we consider that future retail development activity should be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered at alternative locations.
- It is recognised that the Byron LGA may need to plan for additional zoned land to meet commercial and retail demand post 2031. As such, we recommend that consideration be taken to rezone land around commercial centres to plan for the future.



## Section 5: LGA Analysis - Ballina

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Ballina LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Ballina LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Ballina LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, and has considered feedback from the DP&E and Ballina Shire Council.

### 5.1 Key facts, findings and take-outs

#### 5.1.1 Population growth

- Between 2006 and 2011, Ballina LGA's resident population increased by 1,210 persons – equating to an average annual growth rate of 0.6% for the period.
- Consistent with national trends, population increase was largely the result of strong growth within persons aged 65 and over.

- Over the five years to 2011, net migration to Ballina LGA totalled 1,188 persons, underpinned by inflows from Sydney and regional NSW.
- DPE projections suggest the current rate of population growth will decrease marginally over the forecast period (0.5% per annum) to 2031.
- While the 65+ age cohort is expected to incur the majority of this growth, a small increase in traditional 'family' cohorts (0-19 and 35-49) is anticipated.

### 5.1.2 Employment trends

- As at 2011, Ballina LGA supported 13,774 jobs, representing 6% of the North Coast's workforce.
- Collectively, Health Care and Social Assistance and Retail Trade accounted for 30% of all jobs.
- Between 2006 and 2011, it is estimated 1,044 additional jobs were created in Ballina LGA.
- Jobs growth was dominated by the region's largest employer – Health Care and Social Assistance expanding by +525 jobs.
- Six industries incurred outright jobs losses, the largest being in the Agriculture, Forestry and Fishing industry (-159 jobs).

### 5.1.3 Employment land

- In Ballina LGA, there are 384 hectares of land zoned for urban employment purposes – comprising of 33% Business, 36% Industrial and 31% Special Uses.
- Following an increase in the 2006-2011 period, employment growth in Ballina LGA is projected to continue over the forecast period. Between 2011 and 2031, it is anticipated the workforce will expand by 2,073 jobs.
- Our estimates of demand indicate **33,690-44,930 sq.m of commercial, 21,463 sq.m of retail, 62,100-82,790 sq.m of industrial and 33,230–44,300 sq.m of special use** of floorspace will be required by 2031.

- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **3.4–4.5 hectares of commercial**, **4.3 hectares of retail**, **10.4–13.8 hectares of industrial** and **4.2–5.5 hectares of special uses** land will be required by 2031.
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 21.7 hectares*
  - *Supply of industrial land will exceed demand by 77 hectares*
  - *Supply of special uses land will exceed demand by 66.6 hectares*
- Our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of Ballina LGA (out to 2031).
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Ballina LGA. Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Ballina LGA than suggested by this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) and increasing FSRs across business zones represent two practical approaches to delivering more 'business' land and floorspace in Ballina LGA.
- Notably, the Southern Cross Industrial Estate has a range of land use zones including general industrial and bulky goods. The Estate and associated expansion presents an opportunity to deliver large land parcels and a mix of potential uses as a part of the next stage of commercial/industrial land release.

## 5.2 Literature Review

The key documents pertaining to employment lands within Ballina LGA include Ballina Retail Strategy (2003), Ballina Shire Bulky Goods Retailing Investigation study (BSBGRI - 2011) and Ballina Shire Growth Management Strategy 2012 (BSGMS), informed by the Commercial and Industrial Land Audit 2008. Ballina Retail strategy was prepared by Council to direct the growth of retail facilities within the shire. BSBGRI 2011, prepared by Hill PDA for Council, aimed to investigate demand for bulky goods and large format retail premises from 2011 to 2026. BSGMS 2012 was required by the FNCRS (Regional Strategy) and provides a framework for managing population and employment growth to 2031. Ballina Major Regional Centre Strategy is currently being prepared (2014), but is not yet complete.

The following key points are noted in relation to these documents:

- Ballina Major Regional Centre is identified as the primary centre in the LGA in the FNCRS, and this centre is supported by a series of inland and coastal villages.
- Ballina Retail Strategy identified a retail centres hierarchy that established Ballina 'town centre'/Kerr Street precinct as the primary retail centre in the shire.
- District centres were identified at Alstonville and Lennox Head, and neighbourhood/local centres were identified at Wollongbar, Wardell and East Ballina (which effectively forms part of Ballina Major Regional Centre).
- Industrial/bulky goods precincts were identified at Southern Cross, Clark Street and Russellton Industrial Estates.
- In relation to bulky goods retailing, or large format retail (LFR), Ballina Council commissioned the BSBGRI, prepared by Hill PDA in 2011. The analysis indicated demand for an additional 49,500 sq.m of LFR floorspace over the period to 2026, equivalent to about 12.4 hectares of land above the existing developed footprint. However, because there was enough available land supply

within the various bulky goods precincts, an additional 3 hectares was all that needed to be identified to accommodate future growth. The demand analysis accounted for considerable inflow of bulky goods expenditure from surrounding LGAs such as Lismore, Kyogle and Richmond Valley – the latter two of which have a limited supply of such retail.

- The BSBGRI indicated that it would be beneficial if future LFR floorspace is accommodated in the Southern Cross Industrial Estate near the airport, in particular due to its potential to expand.
- The BSGMS identifies future neighbourhood facilities planned at Ballina Heights, Skennars Head and within the Pacific Pines residential release area at Lennox Head. It is also anticipated that the Strategic Growth Area (SGA) of Cumbalum (Precincts A and B) will incorporate commercial development, likely anchored by a supermarket/s, which serves the convenience needs of the local population as the area grows.
- It is noted in the BSGMS (p.16) that a commercial land audit undertaken in 2008 identified about 21.4 hectares of available land supply, including an allowance for 50% of the town centre/CBD to develop commercial properties to two storeys. The audit estimated future demand for commercial land of about 20.5 hectares for the period 2008 to 2028. The conclusion drawn was that the existing supply could accommodate future growth, although supply would need to be augmented in the future to allow an adequate buffer of commercial land.
- The Commercial and Industrial lands audit that informed the BSGMS made allowance for some redevelopment at the Kerr Street retail precinct and identified other areas for commercial and industrial expansion. It was recognised that further assessment would be required to determine the realistic potential for these sites.
- The BSGMS (p.55) aims to maintain the commercial hierarchy of Ballina Shire, and the intent would be enabled in Ballina LEP 2012 through zoning patterns and objectives.

- The BSGMS also detailed that an additional 16.7ha of industrial land would be required to 2028 and combined with the current 60.2ha of vacant land this would be sufficient to accommodate future demand up to 2028.
- The BSGMS identifies Ballina Island as the main commercial and community core (including health facilities). Lennox Head is indicated for light industrial opportunities and an employment precinct in accordance with the Lennox Head Structure Plan. BSGMS also actioned an investigation into the feasibility for a greenfield marine precinct within the Lower Richmond River Estuary.
- It should be noted that the major government development opportunities for 2014/15, from the NSW Budget include a new Fire and Rescue station and Wollongbar TAFE student services centres within the Shire. Ballina/Byron Airport is continuing to grow and is a gateway to both Ballina and Byron LGAs.

### 5.3 Socio-demographic trends

#### 5.3.1 Population change

- According to ABS Estimated Resident Population (ERP) figures, the resident population of Ballina LGA at 2011 was 40,747 residents, which represents an increase of 1,210 persons from 2006–2011.

**Table 5.1**  
Estimated Resident Population (persons) - Ballina LGA

Year	Estimated Resident Population	Total Change (persons)
2001	37,856	
2006	39,537	1,681
2011	40,747	1,210

Source: ABS

- Consistent with national trends, population growth was largely the result of strong growth within persons aged 65+. Between 2006 and 2011, the number of persons in this cohort increased by 1,092.

- At 2011, 43% of the resident population was aged 50 or above.
- Net losses in the 0-19, 20-34 and 35-49 age cohorts were observed during the 2006-2011 period.

**Table 5.2**  
Population By Age (persons) - Ballina LGA

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	10,000	9,802	-198	24%
20-34	5,641	5,353	-288	13%
35-49	8,284	7,907	-377	19%
50-64	8,042	9,023	981	22%
65+	7,570	8,662	1,092	21%
<b>Total</b>	<b>39,537</b>	<b>40,747</b>	<b>1,210</b>	<b>100%</b>

Source: ABS

### 5.3.2 Migration movements

Inward and outward movements for Ballina LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).

- In the five years to 2011, net migration to Ballina LGA totalled 1,188 persons.
- The two main components of Ballina's population net gain are from Sydney and regional NSW, while there was a large net interstate loss (-679 persons).
- The 35-49 age cohort was the dominant age group amongst Ballina's migration population increase (net gain of 681 persons).
- On the other hand, a net loss amongst persons aged 20-34 was recorded (-497 persons). This outflow is consistent with the broader national trend of young adults leaving the North Coast region.

Table 5.3  
Net Migration by Age - Ballina LGA

Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	3	-84	-12	9	129	45
Sydney	123	-36	263	191	134	675
Regional NSW	110	38	120	39	72	379
Interstate	-90	-682	93	-16	16	-679
Overseas	145	267	217	94	45	768
<b>Total Net Migration</b>	<b>291</b>	<b>-497</b>	<b>681</b>	<b>317</b>	<b>396</b>	<b>1,188</b>

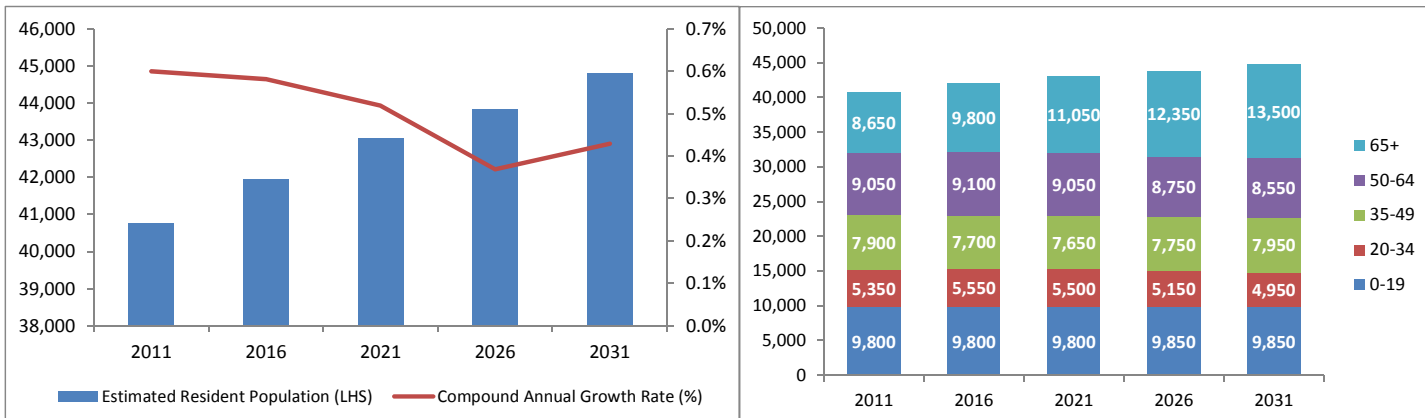
Source: ABS

### 5.3.3 Population projections

- According to DP&E projections, Ballina LGA is projected to expand to 44,750 persons by 2031.
- This equates to growth of 4,000 persons (or 200 per annum) over the 2011-2031 period – at average annual rate of 0.5%.
- Looking ahead, population growth is expected to be most pronounced amongst retirees (65+), with this cohort anticipated to expand by 4,850 persons out to 2031.
- Albeit small, population growth is expected to continue within the 0-19 and 35-49 age cohorts.
- On the other hand, an outright loss is expected in the 20-34 and 50-64 age cohorts – a contraction of 400 and 500 persons respectively to 2031.
- In terms of representation, as at 2011, persons aged 65+ accounted for 21% of Ballina's total population; however this is anticipated to increase to 30% by 2031.
- Growth in older households is expected to underpin demand for additional medical and localised services in general.



**Figure 6. Projected Population and population by age (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

### 5.3.4 Labour force status

- Of all residents in Ballina LGA, around 82% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 58% i.e. 17,707 of 30,777 residents.
- Of residents in labour force, 94% were employed and 6% unemployed (and seeking working) as at 2011.
- Compared to the North Coast region, the unemployment rate in Ballina LGA was lower than in the North Coast region (8%)<sup>2</sup>.

<sup>2</sup> ABS Census of Population and Housing 2011

**Table 5.4**  
**Labour Force Status by Age (number) - Ballina LGA**

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	1,090	203	1,293	1,027	2,320
20 - 29	2,167	249	2,416	580	2,996
30 - 39	2,919	171	3,090	739	3,829
40 - 49	4,134	209	4,343	855	5,198
50 - 59	4,278	203	4,481	1,317	5,798
60 - 69	1,742	81	1,823	3,127	4,950
70 - 79	207	0	207	2,950	3,157
80 - 84	35	0	35	1,263	1,298
85+	19	0	19	1,212	1,231
<b>Total</b>	<b>16,591</b>	<b>1,116</b>	<b>17,707</b>	<b>13,070</b>	<b>30,777</b>

*Source: Census of Population and Housing (2011)*

### 5.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are employed within the boundaries of Ballina LGA.
- According to Census data, around 63.7% of Ballina's employed residents also worked in the LGA.
- The remaining 36% of working residents travel either to other North Coast LGAs (24.6%) or locations outside the North Coast (11.7%) for work.
- Of working residents who are employed in other North Coast LGAs, popular workplace destinations include Lismore (15%), Byron (7%) and Richmond Valley (2%) LGAs.
- The rate of job-containment in Ballina LGA (63.7%) is marginally lower than other North Coast LGAs (70.9%).

**Table 5.5**  
**Job Containment - Ballina LGA**

	<b>Value</b>
Working residents	16,449
<u>Place of Work (number)</u>	
Ballina	10,481
North Coast LGAs (ex. Ballina)	4,044
Outside North Coast	1,924
<b>Total</b>	<b>16,449</b>
<u>Job Containment (%)</u>	
Ballina	63.7%
North Coast LGAs	24.6%
Other	11.7%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The rate of job containment by industry classification for Ballina LGA is presented in the next table.
- Relative to the 'all industries' average for the Ballina LGA (63.7%), eight industries achieved a higher rate of containment.
- Of all industries, Agriculture, Forestry and Fishing industry achieved the highest rate of job containment (81.6%) in 2011, followed by Accommodation and Food Services (77.5%) and Retail Trade (75.6%).
- With the exception of Agriculture, Forestry and Fishing, high job containment industries are predominantly service or professional orientated.

Table 4.6  
Job Containment by Industry - Ballina LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Agriculture, Forestry and Fishing	81.6%	7.7%	10.7%	100.0%
Accommodation and Food Services	77.5%	15.5%	7.1%	100.0%
Retail Trade	75.6%	19.4%	5.0%	100.0%
Rental, Hiring and Real Estate Services	74.3%	20.7%	5.0%	100.0%
Professional, Scientific and Technical Services	71.7%	19.2%	9.1%	100.0%
Other Services	69.6%	20.8%	9.7%	100.0%
Arts and Recreation Services	66.4%	17.7%	15.9%	100.0%
Financial and Insurance Services	64.0%	31.2%	4.8%	100.0%
Manufacturing	60.9%	27.5%	11.6%	100.0%
Wholesale Trade	60.3%	24.1%	15.6%	100.0%
Health Care and Social Assistance	58.3%	35.1%	6.6%	100.0%
Transport, Postal and Warehousing	57.5%	22.9%	19.6%	100.0%
Electricity, Gas, Water and Waste Services	56.5%	31.3%	12.2%	100.0%
Public Administration and Safety	56.0%	36.1%	7.9%	100.0%
Information Media and Telecommunications	55.7%	30.1%	14.2%	100.0%
Education and Training	55.7%	37.7%	6.6%	100.0%
Construction	51.7%	13.4%	34.9%	100.0%
Administrative and Support Services	51.1%	20.6%	28.3%	100.0%
Mining	31.0%	17.9%	51.2%	100.0%
<b>Across all industries</b>	<b>63.7%</b>	<b>24.6%</b>	<b>11.7%</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

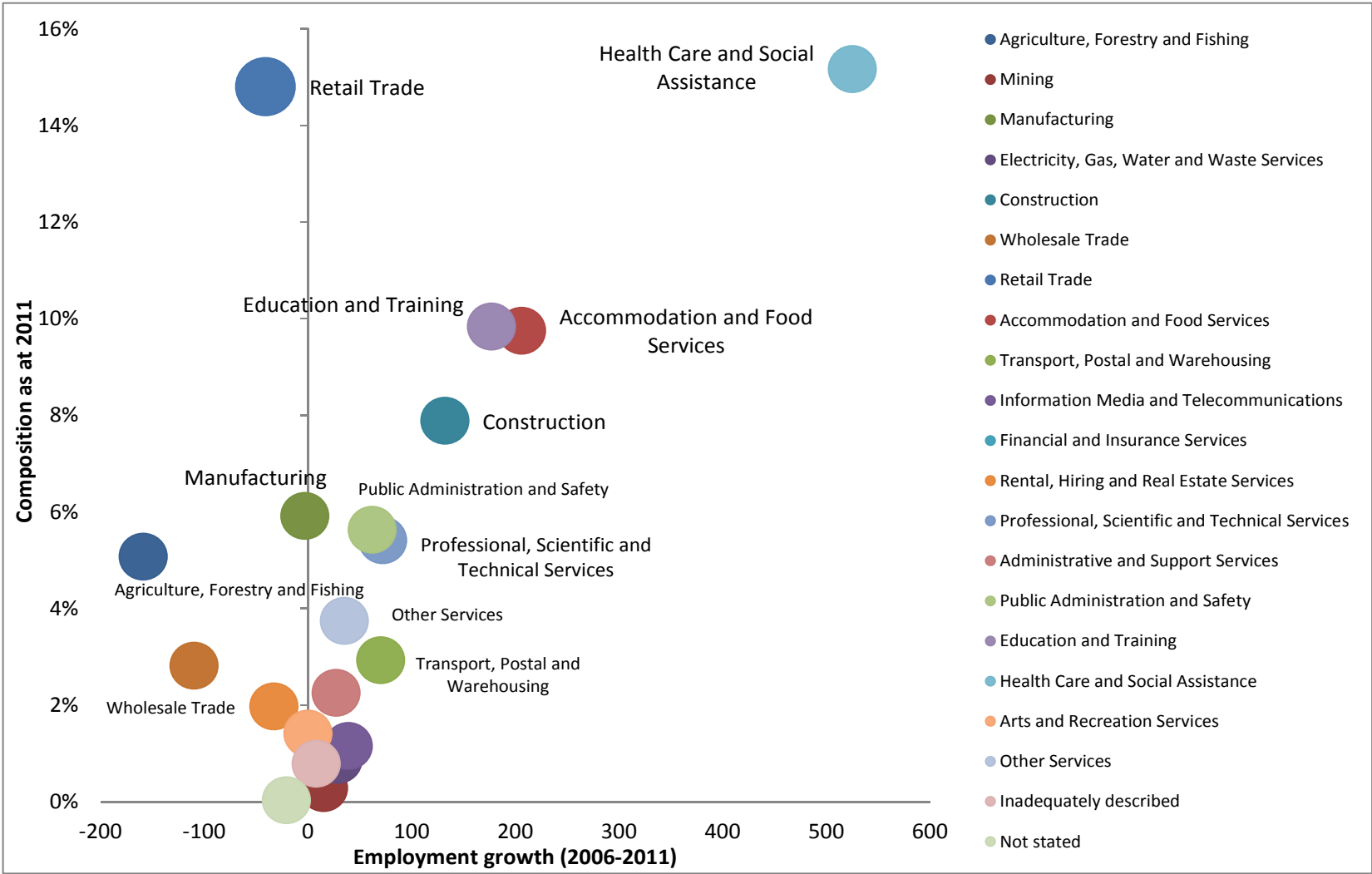
## 5.4 Employment and labour market trends

### 5.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for Ballina LGA and identify key emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within Ballina LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, Ballina LGA supported 13,774 jobs, accounting for around 8% of jobs in the North Coast region.
- The largest employing industries within Ballina LGA are Health Care and Social Assistance (15.2%), closely followed by Retail Trade (14.8%). Collectively, these two industries account for 30% of the LGA's total jobs.

- The next two largest employing industries in the LGA are also service-orientated i.e. Education and Training (9.8%) and Accommodation and Food Services (9.7%).
- High representation in Accommodation and Food Services and Retail Trade is reflective of the LGA's strong connection with tourism.
- Furthermore, Ballina LGA workforce profile is slightly more skewed to white collar jobs than the North Coast average – 21.3% for t Ballina LGA vs. 20.6% for the North Coast region.
- The composition of persons employed within primary industries and traditional value-add industries such as construction and manufacturing is modest, accounting for just around 18.9% of total jobs (in comparison to the North Coast average of 17.8%).
- Like other councils within the Far North Coast region, Ballina is aware of the employment implications of an ageing population and of other service needs of its population (e.g. educational and retail).
- At the same time, however, the need to grow and develop non-population based employment opportunity is also recognised – e.g. in fostering marine-based commercial activity or in developing an aeronautical employment base that is aligned to Ballina's increasingly popular airport. Success in nurturing entrepreneurial activity in these and other employment areas is expected to impact significantly on the rate and type of Ballina's population growth in future years.
- Over the five years to 2011, employment growth totalled 1,044 across Ballina LGA.
- Employment growth over the five years to 2011 was primarily driven by Health care & social assistance (+525 jobs) and Accommodation and Food Services (+206 jobs) – consistent with growth-share industry chart on the previous page.
- Six industries experienced an outright reduction in employment. The largest contraction was observed in Agriculture, Forestry and Fishing (-159 jobs).

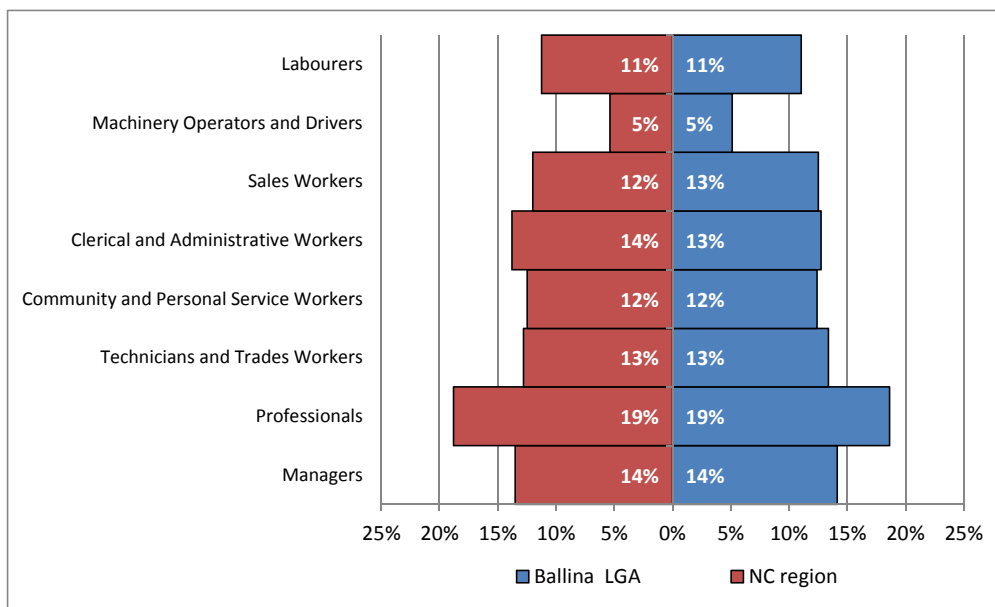
Figure 7. Employment composition and growth by industry, Ballina LGA



### 5.4.2 Occupation profile

- The composition of occupations within Ballina LGA is almost identical to the North Coast regional average.
- As at Census 2011, approximately 16% of the workforce within Ballina LGA was employed within a ‘Professional’ capacity which is slightly below the North Coast average of 19%.
- The next two largest representative occupation types were Managers (15%), followed by Community and Personal Service Workers (15%).

**Figure 8. Occupation Composition (2011)**



Source: ABS, MacroPlan Dimasi

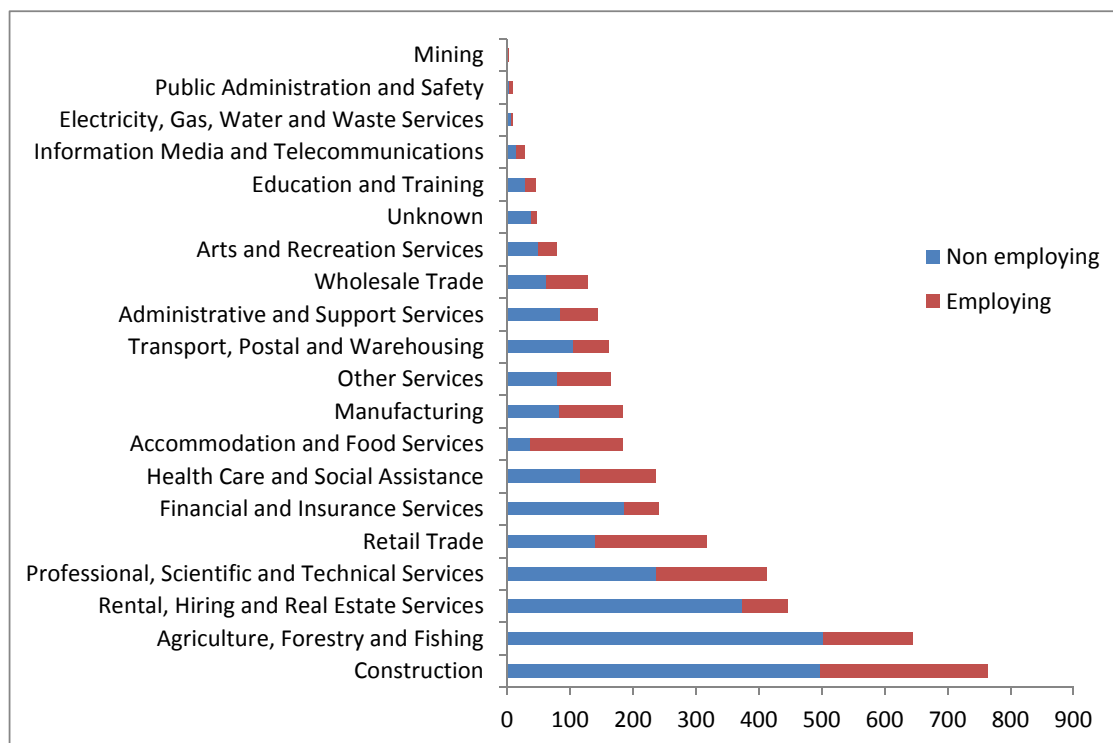
### 5.4.3 Business composition & change

- As at June 2011, there were 4,247 businesses operating within Ballina LGA, with 62% being non-employing/sole trading businesses<sup>3</sup>.
- By industry, businesses in the construction industry dominate (763), followed by Agriculture, Forestry and Fishing (645) and Rental, Hiring and Real Estate Services (446).

<sup>3</sup> 8165.0 – Counts of Australian Businesses, including Entries and Exits, June 2009 to June 2013

- Although Health Care and Social Assistance is the largest employing industry in Ballina LGA, business representation is moderate (116 employing businesses). Notably, there are 69 businesses in this industry that employ between 20 and 199 (i.e. Ballina District Hospital).
- According to the ABS data, there were no businesses employing 200 or more persons within Ballina LGA<sup>4</sup>.

**Figure 9. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses expanded by 41.
- By industry, Construction (-28) and Retail Trade (-24) businesses incurred the largest contraction in business numbers, while growth was most pronounced within the Financial and Insurance Services (+37) and Health Care and Social Assistance (+22) industries.

<sup>4</sup> 8165.0 – Counts of Australian Businesses, including Entries and Exits, June 2009 to June 2013



Table 5.7  
Business Composition and Change - Ballina LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	3	19	22
Retail Trade	-4	-20	-24
Accommodation and Food Services	-4	20	16
Education and Training	9	9	18
Construction	-3	-25	-28
Public Administration and Safety	0	-3	-3
Manufacturing	2	-2	0
Professional, Scientific and Technical Services	10	-10	0
Other Services	-8	-4	-12
Transport, Postal and Warehousing	15	-19	-4
Agriculture, Forestry and Fishing	0	2	2
Administrative and Support Services	-1	1	0
Wholesale Trade	3	7	10
Rental, Hiring and Real Estate Services	3	-5	-2
Financial and Insurance Services	26	11	37
Arts and Recreation Services	6	-9	-3
Electricity, Gas, Water and Waste Services	-6	3	-3
Information Media and Telecommunications	3	-9	-6
Mining	-3	-3	-6
Not Classified	17	10	27
<b>Total</b>	<b>68</b>	<b>-27</b>	<b>41</b>

Source: ABS

#### 5.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Ballina's ageing population is expected to lead to a high rate of retirement over the next 20 years. This will mean that workforce growth in most industries will require new sources of labour to supplement an ageing workforce (i.e. migration and higher retention of young working residents).
- Over the five years to 2011, employment growth was directly tied to an increasing population. For example, jobs in the Health Care and Social Assistance, Education and Training as well as those in the construction sector are directly related to the rate of population growth in any given area. As population growth slows, so too does jobs growth in these sectors.
- At the same time, employment growth in the Manufacturing industry was weak, with an employment loss of 3 jobs over the 2006 to 2011 period.

Looking ahead, it is likely that further erosion of traditional manufacturing industries continues.

- Health Care and Social Assistance is an important industry within the North Coast region, particularly given its ageing population and increasing demand for health services, aged care and disability support. Consequently, employment within Health Care and Social Assistance will become increasingly important in coming years, and a further emphasis of employment growth should be encouraged.
- A strong opportunity exists in the promotion of tourism services, particularly as Ballina's regional airport acts as the major entry point to the region.

## 5.5 Employment land supply

### 5.5.1 Zoned Urban Employment Land

- Using zoning layers issued by the Department of Planning and Environment (July 2014 edition), the current stock of zoned land has been obtained.
- The information presented in this assessment is based on Ballina Local Environmental Plan 2012.
- Three main employment land use categories apply in Ballina LGA, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones in Ballina LGA, as well as the area of land assigned to each respective land use zone.

**Table 5.8**  
Zoned Employment Land - Ballina LGA

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	13.9	4%
	B2. Local Centre	26.3	7%
	B3. Commercial Core	44.1	11%
	B4. Mixed Use	6.1	2%
	B5. Business Development	10.8	3%
	B6. Enterprise Corridor	24.2	6%
	<b>Total</b>	<b>125.3</b>	<b>33%</b>
Industrial	IN1. General Industrial	138.8	36%
	<b>Total</b>	<b>138.8</b>	<b>36%</b>
Special Uses	SP2. Infrastructure	120.6	31%
	<b>Total</b>	<b>120.6</b>	<b>31%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>384.7</b>	<b>100%</b>

Source: NSW Department of Planning and Environment (2014)

- In total, there is approximately 384.7 hectares of land zoned for urban employment uses in Ballina LGA.
- Representing the largest allocation, approximately 36% of urban employment zoned land is set aside for industrial purposes.
- At 125.3 hectares, business zoned land represents the next largest group (33%).
- Within dedicated business zones (B1, B2, B3, B4, B5 and B6), there is a significant allocation to B3 Commercial Core. Consisting of 44.1 hectares, this allocation includes Ballina Town Centre and Kerr Street Retail Precinct.















# Map 5.1

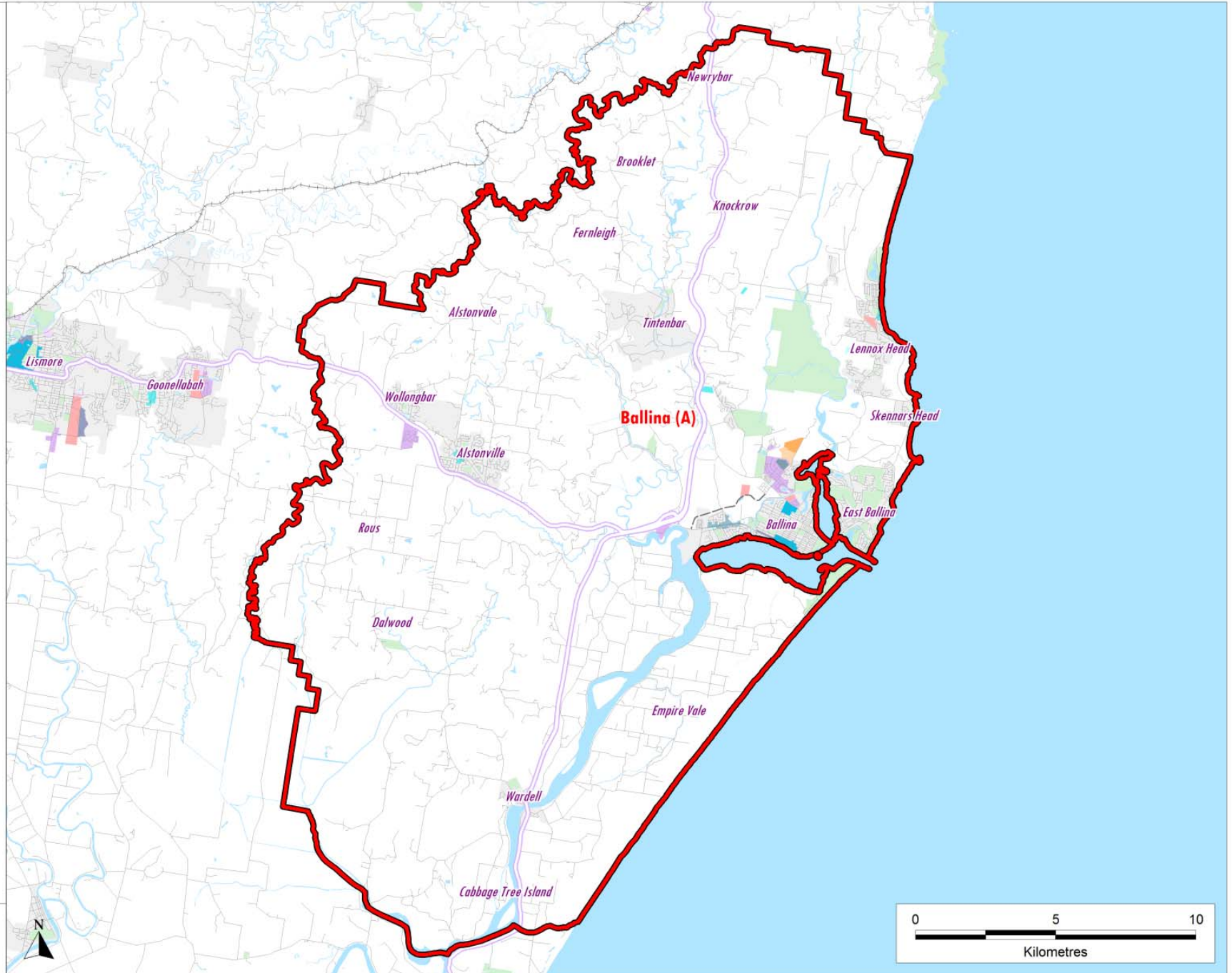
## Ballina Shire Employment Land Zones

Legend \*

 Ballina Shire Boundary

Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed B6
-  Proposed B7
-  Proposed Industrial Precincts



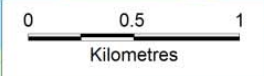
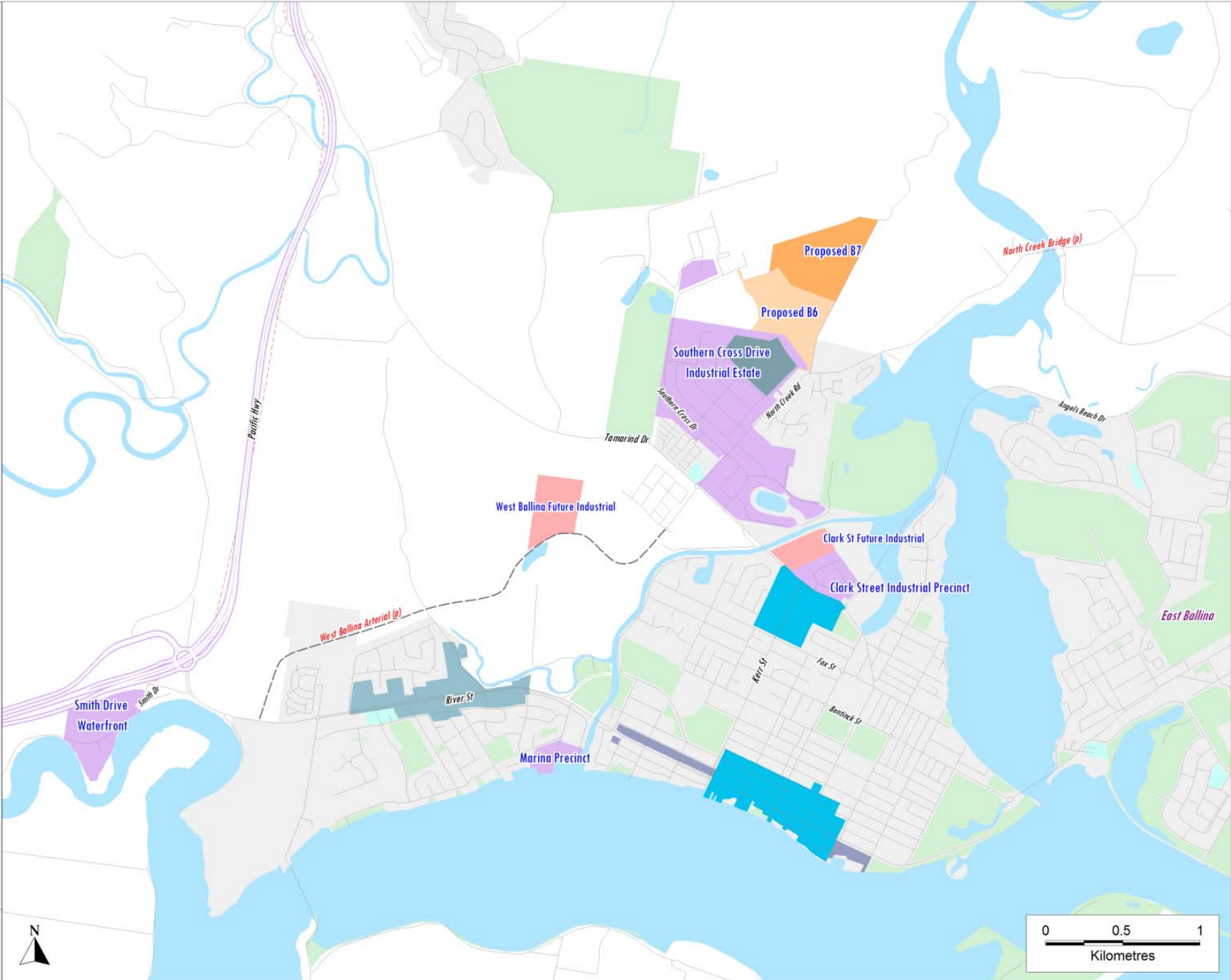
# Map 5.2

## Ballina Employment Land Zones

Legend \*

Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed B6
- Proposed B7
- Proposed Industrial Precincts



### 5.5.2 Industrial – Existing supply

- In Ballina LGA, there is one industrial land use zone i.e. IN1 General Industrial.
- A review of previous studies, policy documents and preliminary desktop research has revealed three established industrial precincts in the Ballina LGA.
- Details of each precinct are presented in the following table.

Name	Area (ha)	Developed (ha)	Undeveloped (ha)
Southern Cross Drive Industrial Estate	61.0	58.0	3.0
Russelltown Drive Industrial Precinct	44.0	28.4	15.6
Smith Drive Waterfront	16.4	4.9	11.5
<b>Total</b>	<b>121.4</b>	<b>91.3</b>	<b>30.1</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our examination of established industrial precincts include:

- These three precincts occupy 121.4 hectares of industrial land.
- The **Southern Cross Industrial Estate** adjoins the southern perimeter of Ballina Byron Gateway Airport. The precinct has access to the Pacific Highway via Tamarind Drive. This road access provides a direct connection to key trade locations along the eastern seaboard coast.
- Existing uses at this precinct include manufacturers (OEM Dynamics, Triple X Wetsuits, Make-it Shutters and shades and Creative blinds and awnings), self-storage, Harvey Norman, wholesalers (e.g. B&E Blanch) and other local orientated businesses (e.g. Byron Bay Glass and Aluminium, Dave Bazar Plumbing, North Coast Wedding & Party Hire etc.).



- The restoration of North Creek Road including the bridge restoration to Lennox Head has the potential to significantly increase exposure to the Southern Cross Industrial Precinct and the Airport Precinct to passing trade. These projects will establish North Creek Road as the major entry point to the Southern Cross Industrial Estate.
- The **Russellton Drive Industrial Estate** is located approximately 2km west of Alstonville, and falls outside the perimeter of the town and surrounds. Existing uses include manufacturers (Macadamia Oils of Australia and the Koala Tea Company), self- storage, Boral Country-Concrete and quarries, and other local orientated businesses (e.g. Rob's Mowers, Richmond Ceramics, Alstonville Kitchens, etc.).
- Of total industrial zoned land, it is estimated that around 91.3 hectares or 75% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 30.1 hectares of zoned industrial land is available for future development.
- At an average floor space ratio of 0.6:1, this equates to approximately 18 hectares of industrial floorspace.

### 5.5.3 Industrial – Future supply

- The information presented in this section has considered previous employment lands reviews, third-party proprietor databases and other publicly sourced information sources.
- Over the forecast period, there are two industrial precincts are proposed for Ballina LGA.
- The table below presents the proposed land area (in hectares) and the expected delivery of Industrial precincts.

**Table 5.10**  
**Future Industrial Precincts - Ballina LGA**

<b>Precinct</b>	<b>Land Area</b> (Hectares)	<b>Timing</b> (Years)
West Ballina Structure Plan areas	32.0	10 - 20
Clark Street Industrial Precinct	27.0	10 - 20
<b>Total</b>	<b>59.0</b>	

*Source: MacroPlan Dimasi*

- In total, there are approximately 119 hectares of proposed industrial land in Ballina LGA.
- The **Southern Cross Industrial Estate** is a proposed expansion of the existing industrial precinct. An additional 60 hectares of industrial land is expected to be delivered within a ten year period.
- As advised by Council, the planning proposal is currently considering the application of other land use zones within the proposed expansion area. Moreover, the development of additional land within the Southern Cross Industrial Estate presents the opportunity to provide large land parcels as a part of the next stage of commercial/industrial land release.
- The **Lennox Head Structure Plan** establishes a framework for the provision of new urban release areas in Lennox Head. The Master plan incorporates 11 hectares of industrial land, which is anticipated to be delivered within 20 years.

#### 5.5.4 Retail & commercial – Existing supply

Ballina LGA's retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 5.3 and Map 5.4.

- Ballina LGA's centres hierarchy generally consists of the following structure:
  - Ballina Major Regional Centre
  - Smaller scale coastal and inland villages (such as Alstonville, Lennox Head, Wollongbar)



- There are three sub-regional shopping centres in the LGA, all located within land zoned commercial core, north of the town centre, each of which includes a discount department store. There is also an enclosed bulky goods shopping centre, namely the Harvey Norman Centre Ballina, located north of the town centre.

### **Ballina Major Regional Centre**

- Ballina Major Regional Centre is the primary retail and commercial activity centre in Ballina LGA, occupying around 90.9 ha of business zoned land, of which 5.7 ha is B1 land, 44.1 is B3 land, 6.1 ha is B4 land, 10.8 ha is B5 land and 24.2 ha is B6 land.
- The major regional centre includes a town centre precinct around River Street, which includes a Woolworths supermarket, as well as incorporating an extensive provision of supporting specialty retail including cafes, restaurants, and non-food retailers like pharmacies, discount variety stores and other non-food related retailers. In total there is an estimated 120,000 sq.m of retail floorspace in the town centre (p.36 Hill PDA BSBGRI)
- The mix of non-retail floorspace consists of short-term accommodation, residential dwellings, service stations, pubs, medical/health facilities, civic/community and business services.
- The Kerr Street Precinct includes the three major retail centres in Ballina LGA, namely:
  - Ballina Central, located on the eastern side of Kerr Street, comprises 13,950 sq.m of retail floorspace and is anchored by a Big W dds and IGA supermarket.
  - Ballina Fair shopping complex, located on the western side of Kerr Street, currently provides approximately 12,600 sq.m of retail floorspace, including a Target dds and full-line Woolworths supermarket.
  - Ballina Kmart is situated immediately south of Ballina Central on Kerr Street. The 9,500 sq.m centre is anchored by a Kmart discount

department store and a Coles supermarket and also includes a First Choice liquor store.

- There are several bulky goods/industrial precincts within the broader Ballina Major Regional Centre, including the Southern Cross Industrial precinct near the airport, and West Ballina.

### **Other centres/villages**

There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:

- East Ballina is the area between North Creek and the Pacific Ocean, adjoining Skennars Head to the north. The East Ballina area is serviced by a neighbourhood centre, namely the East Ballina Shopping Centre, which provides between 1,000 and 1,500 sq.m of retail floorspace, primarily serving the convenience needs of the surrounding area.
- West Ballina includes the Key West Shopping Centre, which provides between 2,000 and 2,500 sq.m of floorspace, primarily serving the convenience needs of local residential population including a butcher, bakery and tavern.
- A small set of shops at Lennox Head (2,500 sq.m), anchored by an IGA supermarket. A new centre is identified in this location in the BSGMS.
- A small set of shops at Wollongbar (3,000 sq.m), anchored by an IGA supermarket.
- A Coles supermarket anchored shopping complex in Alstonville (6,000 sq.m).

# Map 5.4

## Ballina Shire Bulky/ Homemaker Goods Retailing

### Legend \*

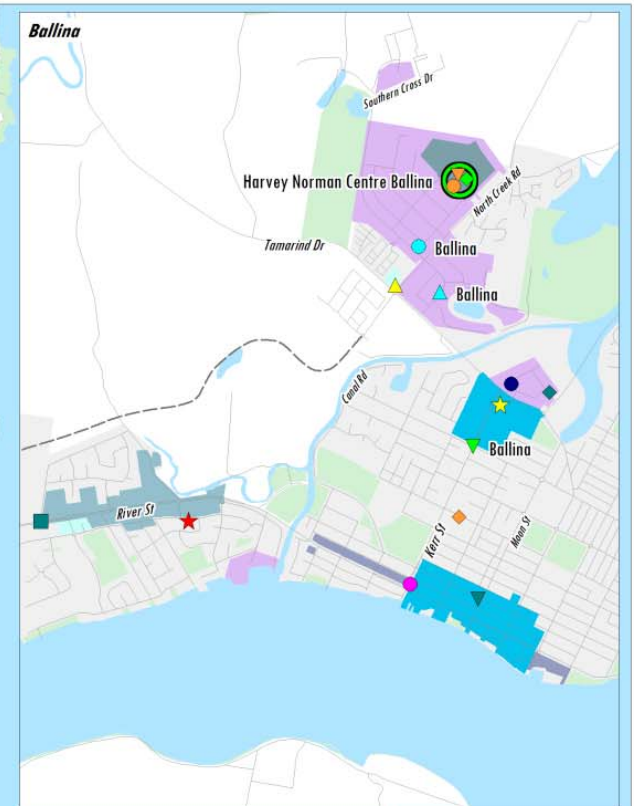
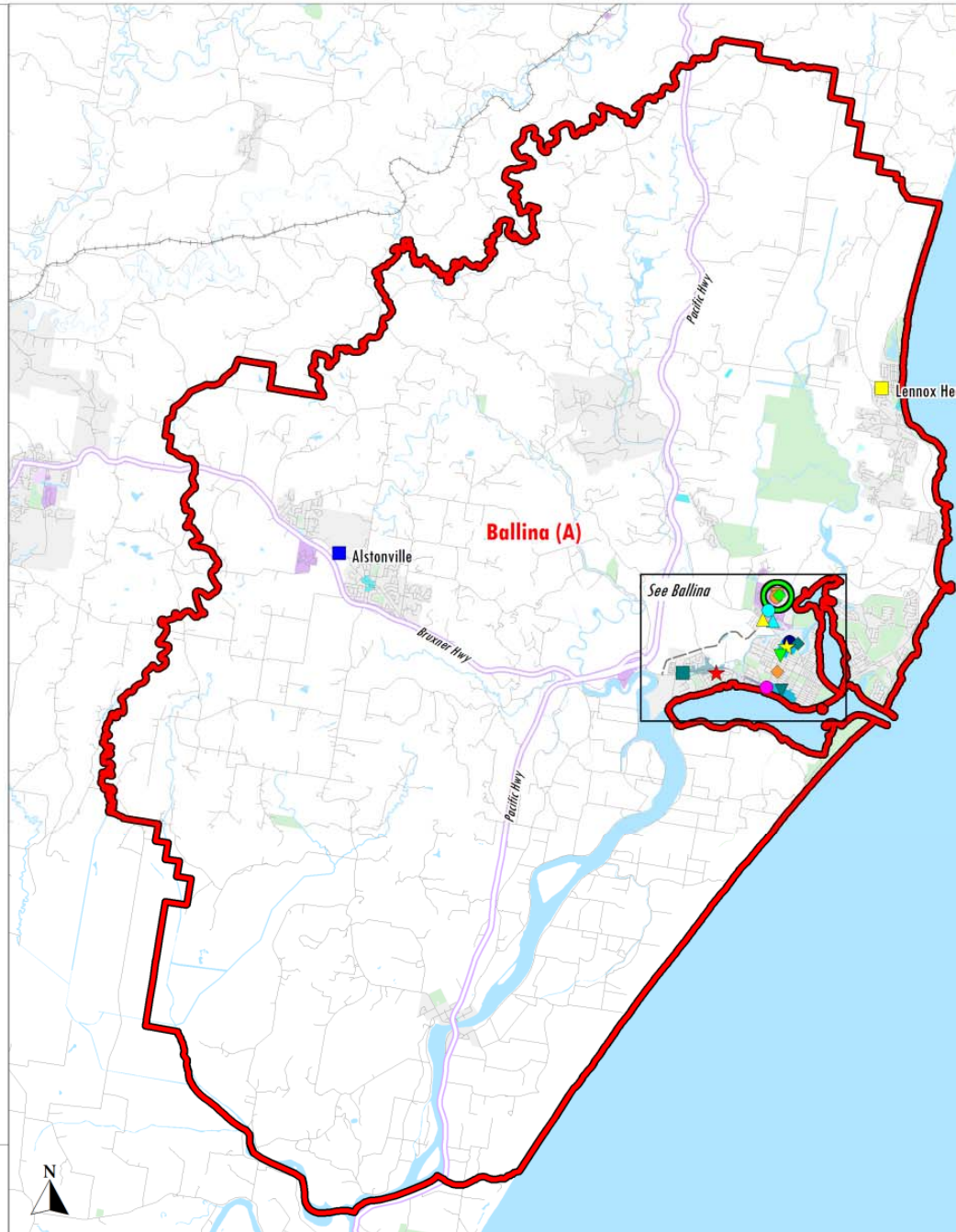
Ballina Shire Boundary

Homemaker Centre

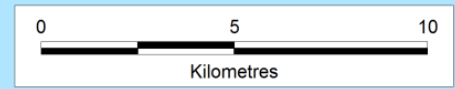
### Bulky Goods Retailers

- Bunnings Warehouse
- Mitre 10
- Thrifty Link
- House
- Lincraft
- Spotlight
- Repco
- Super Cheap Auto
- Carpet Court
- Carpet One
- Forty Winks
- Snooze
- Dick Smith
- The Good Guys
- Harvey Norman
- Super A Mart
- Vast Interior

\* Hollow symbols indicate proposed stores



Land Zones			
	B1		B7
	B2		IN1
	B3		IN2
	B4		IN3
	B5		IN4
	B6		



# Map 5.3

## Ballina Shire Retail Provision

### Legend \*

Ballina Shire Boundary

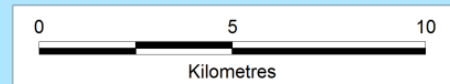
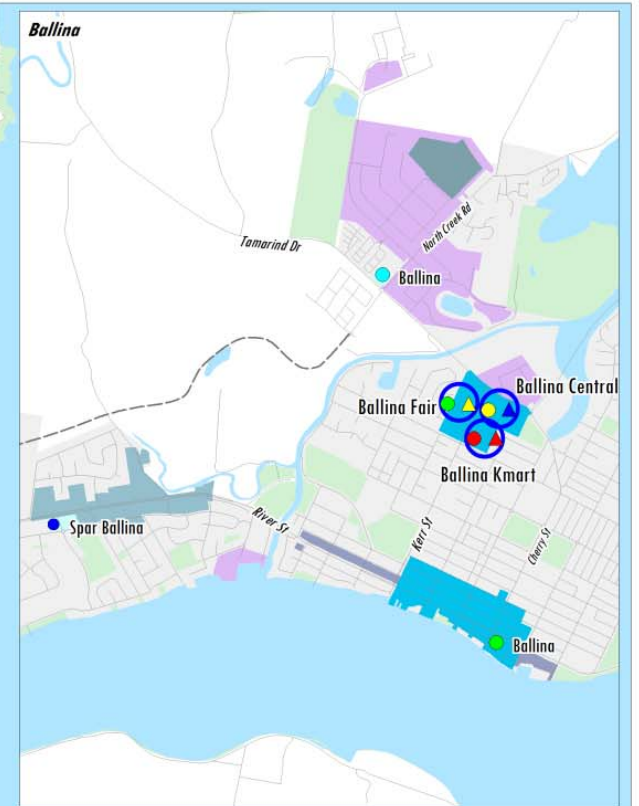
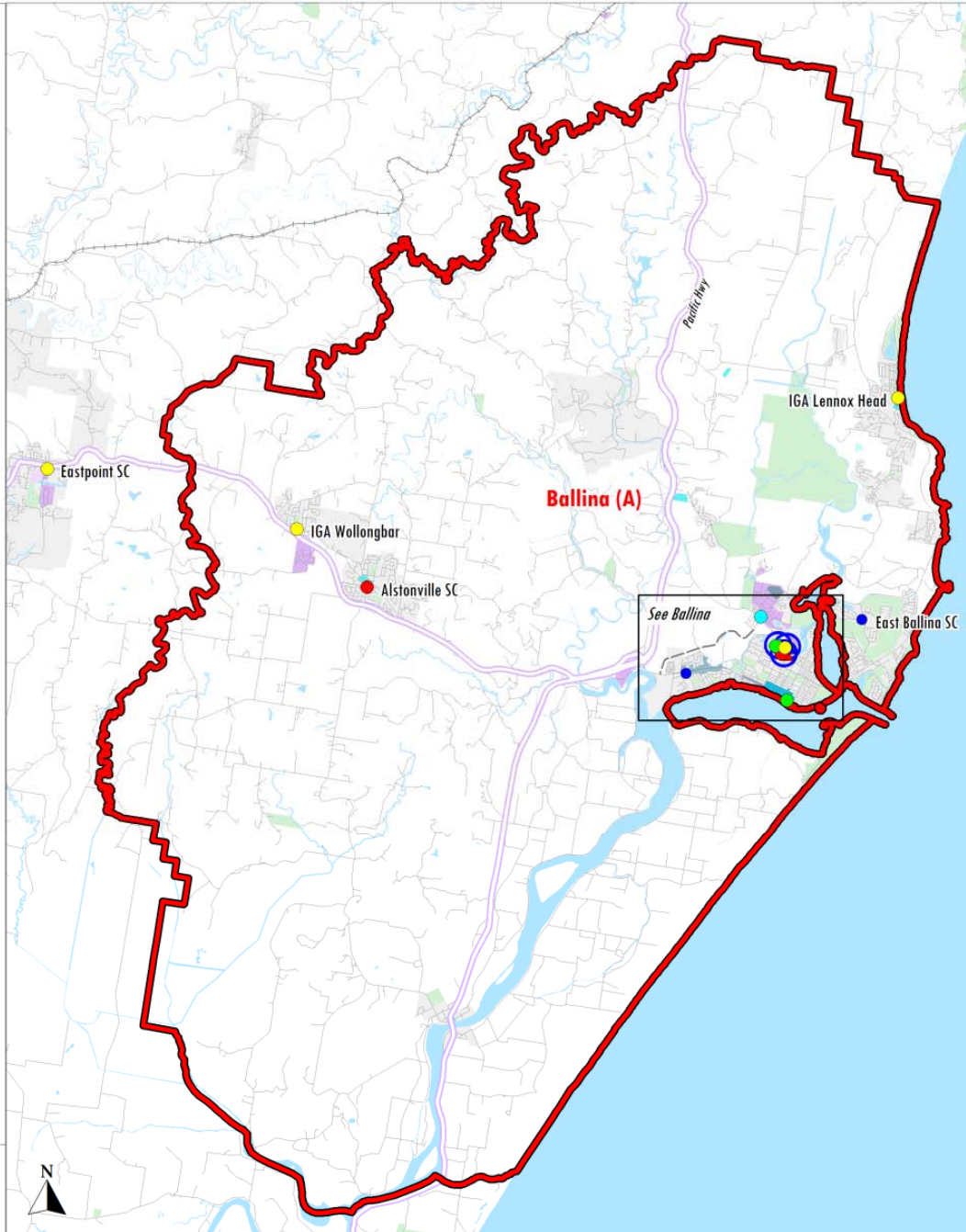
#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

#### Retail Competition

- Sub-Regional Centre
- Big W
- Target
- Kmart
- Woolworths
- Coles
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores





### **Business zoned land capacity for retail and commercial floorspace**

Table 5.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **125.3 hectares of business zoned land** within Ballina LGA, of which 13.9 ha is B1 zoned land, about 26.3 ha is B2 zoned land, about 44.1 ha is B3 zoned land, some 6.1 ha is B4 zoned land, 10.8 ha is B5 zoned land and 24.2 ha of B6 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is about 10.8 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts.
- We have applied FSRs for each business zone type from the Ballina LEP 2012 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- We estimate the indicative retail/commercial capacity of existing business zones in Ballina LGA to be in the order of 1,839,076 sq.m.
- We estimate that there is a net inflow from the LGA in the order of about 10%, with outflows of expenditure more than matched by inflows from the Byron, Richmond Valley, and Lismore LGAs – in particular for higher order/bulky goods retailing. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an understanding of the suitability of the zoned business land stock to meet future demand.

**Table 5.11**  
**Ballina LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B1	13.9	0.6	83,250
Total B2	26.3	0.7	184,231
Total B3	44.1	2.6	1,145,643
Total B4*	6.1	1.4	85,218
Total B5*	10.8	1.1	122,904
Total B6*	<u>24.2</u>	0.9	<u>217,831</u>
<b>Total LGA</b>	<b>125.3</b>		<b>1,839,076</b>

*\*NSW North Coast region average for zone type*

*Source: Ballina LEP 2012, MapInfo; NSW Govt; MacroPlan Dimasi*

### 5.5.5 Retail & commercial – Future supply

There are several proposed retail developments of significance within the Ballina LGA. The developments most relevant to our analysis include:

- A proposed shopping centre development in Lennox Head, namely Ballina Street Shopping Complex, has development approval to provide approximately 1,000 sq.m of floorspace including nine shop tenancies and two office tenancies.
- Significantly, DP&E has advised of plans to extend the Southern Cross Drive Industrial Estate north, primarily consisting of B6 zoned land. It is estimated that the precinct will encompass approximately 40,100 sq.m.

### 5.5.6 Special uses - Existing supply

- According to Ballina LEP 2012 there is one category of zoning associated with 'Special Use'; SP2 Infrastructure.
- Area assigned to sewerage systems has been removed from our estimates of urban employment land for this category.
- As such, the 'Special Uses' category comprises of one facility; Ballina Byron Gateway Airport and associated infrastructure, totalling 120.6 hectares. Of the

120.6 hectares, we estimate that approximately 48 hectares has been developed, suggesting there is capacity to accommodate future expansion.

**Figure 10. Ballina-Byron Gateway Airport Land zoned SP2**



*Source: Planning Viewer - DP&E, 2015*

### 5.5.7 Special uses - Future supply

- Within this category there is one planned expansion project, relating to the Ballina Byron Gateway Airport.
- There are plans to expand the airport terminal capacity (from 3,200 to 6,500sq.m), provide a new landside entrance road and deliver additional car parking provision. These works are anticipated to be undertaken over the two years to 2017. Once complete, it is projected that the airport will have the capacity to accommodate 900,000 passengers per annum.
- The construction of an expanded airport terminal facility and associated upgrades is expected to support a range of professional and construction jobs. Once complete, operational employment opportunities are anticipated to ensue. Additionally, the expansion of the airport will support economic growth of the region for business and tourism.

**Figure 11. Ballina Byron Gateway Airport Infrastructure Upgrade**



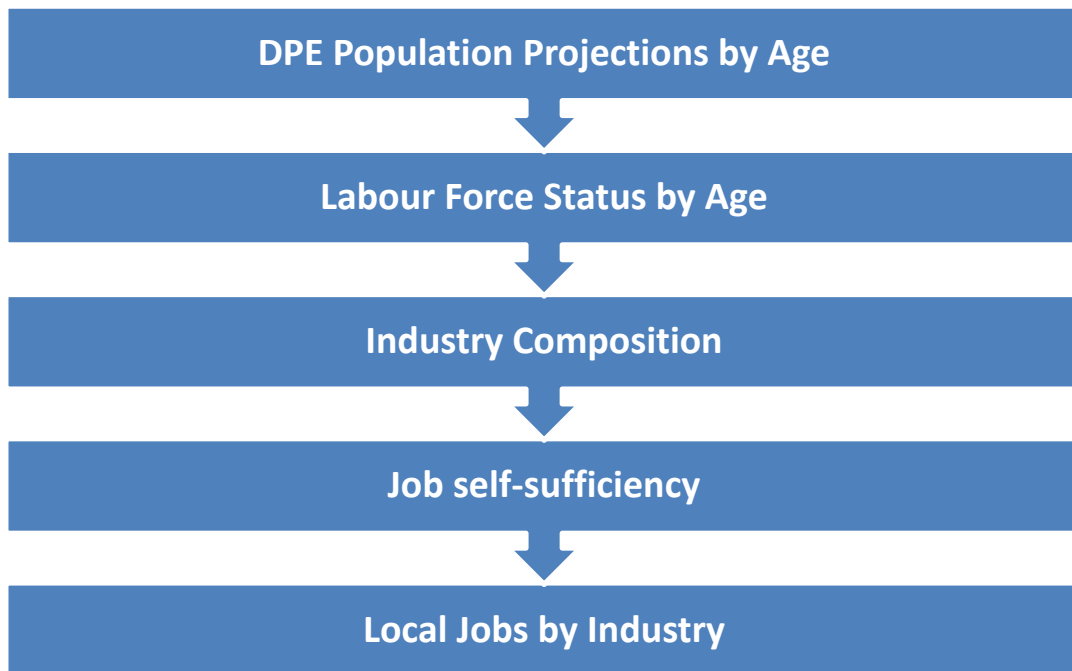
*Ballina Byron Gateway Airport, 2014*

## 5.6 Demand for employment land

### 5.6.1 Methodology

- In deriving the quantum of commercial, industrial and special use land required in Ballina LGA, we first generate employment projections.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry Ballina LGA to generate jobs.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process by which employment forecasts for Ballina LGA have been derived.





- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 5.6.2 Employment Projections

- Following an increase in the 2006-2011 period, employment growth in Ballina LGA is projected to continue over the forecast period. Between 2011 and 2031, it is anticipated the workforce will expand by 2,073 jobs.
- Our projections imply Ballina LGA workforce will exceed 15,800 by 2031.
- At an average rate of 104 jobs per annum, the projected rate of employment growth is below that observed between 2006 and 2011 (average of 209 jobs per annum).

- By industry, employment growth is expected to be dominated by population driven industries – similar to the 2006 and 2011 period. Solid jobs growth is projected for Health Care and Social Assistance (+589), Education and Training (+356), Retail Trade (+307) and Accommodation and Food Services (+273).
- Outright job losses is envisaged for four industries; mainly in the Manufacturing (-196) and Agriculture, Forestry and Fishing (-97) industries.

**Table 5.12**  
Employment by Industry - Ballina LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	2,084	2,336	2,673	589
Education and Training	1,352	1,518	1,708	356
Retail Trade	2,034	2,117	2,341	307
Accommodation and Food Services	1,340	1,518	1,613	273
Construction	1,084	1,168	1,281	197
Professional, Scientific and Technical Services	744	841	927	183
Rental, Hiring and Real Estate Services	271	316	406	135
Transport, Postal and Warehousing	403	482	522	119
Wholesale Trade	387	448	475	88
Electricity, Gas, Water and Waste Services	119	158	202	83
Financial and Insurance Services	313	352	381	68
Administrative and Support Services	310	331	374	64
Other Services	515	526	554	39
Mining	39	56	61	22
Information Media and Telecommunications	159	150	162	3
Public Administration and Safety	774	756	755	-19
Arts and Recreation Services	194	211	165	-29
Agriculture, Forestry and Fishing	697	613	600	-97
Other*	112	0	0	-112
Manufacturing	813	701	617	-196
<b>Total jobs</b>	<b>13,744</b>	<b>14,597</b>	<b>15,817</b>	<b>2,073</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The next table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 5.13**  
Industry and Land Use Conversion Matrix - Ballina LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use type, as presented in Table 5.14 below.

**Table 5.14**  
Employment Additions by Land Use Type - Ballina LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	2	0	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	4	4	35	40	0	0
Construction	8	11	75	102	0	0
Wholesale Trade	49	21	12	5	0	0
Retail Trade	79	213	4	11	0	0
Accommodation and Food Services	125	66	54	28	0	0
Transport, Postal and Warehousing	16	8	63	32	0	0
Information Media and Telecommunications	0	12	0	0	0	0
Financial and Insurance Services	39	29	0	0	0	0
Rental, Hiring and Real Estate Services	45	90	0	0	0	0
Professional, Scientific and Technical Services	97	86	0	0	0	0
Administrative and Support Services	21	43	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	17	19	0	0	150	171
Health Care and Social Assistance	50	67	0	0	202	270
Arts and Recreation Services	17	0	0	0	0	0
Other Services	11	28	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 5.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in Ballina LGA (presented in Table 5.15).

**Table 5.15**

**Indicative Employment Density by Industry and Land Use Type - Ballina LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative

employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 5.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Ballina LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	340	90	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	150	180	8,700	10,070	0	0
Construction	250	340	11,320	15,280	0	0
Wholesale Trade	1,460	640	2,430	1,070	0	0
Retail Trade	3,150	8,510	580	1,570	0	0
Accommodation and Food Services	6,240	3,320	8,030	4,270	0	0
Transport, Postal and Warehousing	470	240	12,610	6,430	0	0
Information Media and Telecommunications	0	370	0	0	0	0
Financial and Insurance Services	980	730	0	0	0	0
Rental, Hiring and Real Estate Services	1,120	2,240	0	0	0	0
Professional, Scientific and Technical Services	2,430	2,150	0	0	0	0
Administrative and Support Services	520	1,080	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	670	760	0	0	7,490	8,540
Health Care and Social Assistance	2,020	2,700	0	0	12,090	16,180
Arts and Recreation Services	670	0	0	0	0	0
Other Services	420	1,120	0	0	0	0
<b>Total</b>	<b>20,550</b>	<b>24,380</b>	<b>44,010</b>	<b>38,780</b>	<b>19,580</b>	<b>24,720</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated approximately **20,550 sq.m of commercial, 44,010 sq.m of industrial and 19,580 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **24,380 sq.m of commercial, 38,780 sq.m of industrial and 24,720 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation from which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 5.17.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better representative of likely actions and decisions made by businesses.

**Table 5.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Ballina LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	250	70	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	120	130	6,520	7,560	0	0
Construction	190	250	8,490	11,460	0	0
Wholesale Trade	1,100	480	1,830	800	0	0
Retail Trade	2,360	6,380	440	1,180	0	0
Accommodation and Food Services	4,680	2,490	6,020	3,200	0	0
Transport, Postal and Warehousing	350	180	9,460	4,820	0	0
Information Media and Telecommunications	0	280	0	0	0	0
Financial and Insurance Services	730	550	0	0	0	0
Rental, Hiring and Real Estate Services	840	1,680	0	0	0	0
Professional, Scientific and Technical Services	1,830	1,610	0	0	0	0
Administrative and Support Services	390	810	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	500	570	0	0	5,620	6,410
Health Care and Social Assistance	1,510	2,020	0	0	9,070	12,130
Arts and Recreation Services	500	0	0	0	0	0
Other Services	320	840	0	0	0	0
<b>Total</b>	<b>15,420</b>	<b>18,270</b>	<b>33,010</b>	<b>29,090</b>	<b>14,690</b>	<b>18,540</b>

Source: MacroPlan Dimasi

- The Alternative Scenario indicates **15,420 sq.m of commercial, 33,010 sq.m of industrial** and **14,690 sq.m of special use** floorspace demand will materialise by 2021.
- Under the alternative scenario, demand is anticipated to rise relative to the prior ten year period – in line with higher employment growth. Over the ten years to 2031, an additional **18,270 sq.m of commercial, 29,090 sq.m of industrial** and **18,540 sq.m of special uses** floorspace is expected to materialise.

#### 5.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Ballina LGA was extracted from July 2014 Department of Planning and Environment GIS layers. While there are no specific references for industrial or special uses, a range of FSRs were observed for business zones.
- The observed average FSR for B1 Neighbourhood Centre is 0.6:1 and 0.7:1 for land zoned for B2 Local Centre purposes. For the B3 Commercial Core zoning, a FSR of 2.6:1 applies.
- As such, a FSR of 1:1 has been applied across all business zones, 0.6:1 for industrial uses and 0.8:1 for Special Uses (based on the North Coast applied average).
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **3.4–4.5 hectares of commercial**, **10.4–13.8 hectares of industrial** and **4.2–5.5 hectares of special uses** land will be required by 2031.

**Table 5.18**  
Demand for Employment Land (2031) - Ballina LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	3.4 - 4.5	1.0	3.4 - 4.5
Industrial	6.2 - 8.3	0.6	10.4 - 13.8
Special Uses	3.3 - 4.4	0.8	4.2 - 5.5

Source: MacroPlan Dimasi

### 5.6.5 Demand for Retail Floorspace

The potential drivers of future demand for retail floorspace in Ballina LGA are summarised below:

- Population growth – which is expected to be moderate, growing at an average of 0.5% per annum to 2031 (a net increase of 9.9% or 4,000 people). Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 5.19 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within Ballina LGA, presently, and at five yearly intervals to 2031. This table also presents the additional demand generated by the annual tourist/visitor market, for each forecast year.

- The residential population of Ballina LGA generates approximately **84,700 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **19,981 sq.m** by 2031, an increase of about **24%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **7,762 sq.m**, and is expected to increase by about **1,500 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **4.3 hectares**, assuming an average floorspace ratio (FSR) of 0.5.



**Table 5.19**  
Ballina LGA - retail expenditure (\$M) and floorspace demand (sq.m), 2014-2026\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	41,470	41,950	43,050	44,000	44,750	0.4%
Tourism equiv. pop	3,418	3,457	3,548	3,626	3,688	0.4%
<b>Retail exp. (\$M)</b>						
Food & liquor	230	236	253	271	290	1.4%
Food catering	60	62	68	73	79	1.6%
Apparel	44	45	47	49	51	0.9%
Household	87	89	93	97	101	0.9%
Leisure	25	25	27	28	30	1.1%
General	41	43	46	50	53	1.5%
Retail services	<u>14</u>	<u>14</u>	<u>15</u>	<u>16</u>	<u>16</u>	<u>1.1%</u>
<b>Total</b>	<b>502</b>	<b>514</b>	<b>548</b>	<b>584</b>	<b>620</b>	<b>1.3%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	25,583	26,269	28,132	30,157	32,171	1.4%
Food catering	10,056	10,378	11,252	12,212	13,190	1.6%
Apparel	8,060	8,195	8,560	8,951	9,315	0.9%
Household	29,140	29,626	30,947	32,362	33,677	0.9%
Leisure	4,115	4,205	4,448	4,709	4,962	1.1%
General	6,888	7,094	7,654	8,266	8,884	1.5%
Retail services	<u>2,263</u>	<u>2,313</u>	<u>2,446</u>	<u>2,590</u>	<u>2,729</u>	<u>1.1%</u>
<b>Total</b>	<b>84,663</b>	<b>86,751</b>	<b>92,417</b>	<b>98,571</b>	<b>104,644</b>	<b>1.5%</b>
<b>Floorspace per capita</b>	<b>2.04</b>	<b>2.07</b>	<b>2.15</b>	<b>2.24</b>	<b>2.34</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	3,418	3,457	3,548	3,626	3,688	0.4%
Floorspace per capita**	<u>1.84</u>	<u>1.86</u>	<u>1.93</u>	<u>2.02</u>	<u>2.10</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>6,280</b>	<b>6,435</b>	<b>6,855</b>	<b>7,311</b>	<b>7,762</b>	<b>1.3%</b>
<b>Total retail demand (sq.m)</b>	<b>90,943</b>	<b>93,185</b>	<b>99,272</b>	<b>105,882</b>	<b>112,406</b>	<b>1.3%</b>
<b>Demand growth (14-31)</b>					<b>21,463</b>	
<b>Estimated land take (ha)</b>					<b>4.3</b>	

\*Constant 2013/14 dollars & including GST

\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.

Source: MarketInfo; MacroPlan Dimasi

## 5.7 Gap assessment

MacroPlan Dimasi has undertaken a market 'gap' assessment of employment land for the Ballina LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Ballina LGA.

Key findings pertaining to our gap assessment are presented in Table 5.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	125.3	25.1	4.2	29.3	7.5	21.7
Industrial	138.8	30.1	59.0	89.1	12.1	77.0
Special Uses	120.6	71.4	0.0	71.4	4.8	66.6

Source: MacroPlan Dimasi

- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 21.7 hectares*
  - *Supply of industrial land will exceed demand by 77 hectares*
  - *Supply of special uses land will exceed demand by 66.6 hectares*
- Our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of Ballina LGA (out to 2031).
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Ballina LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Ballina LGA than suggested by this land assessment, particularly in relation to accommodating new and emerging businesses.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) and increasing FSRs across business zoned land represent two practical approaches to delivering more 'business' land and floorspace in Ballina LGA.
- Notably, the Southern Cross Industrial Estate has a range of land use zones including general industrial and bulky goods. The Estate and associated expansion presents an opportunity to deliver large land parcels and a mix of potential uses as a part of the next stage of commercial/industrial land release.

## 5.8 Conclusions

### 5.8.1 Commercial, Industrial and Special Uses

Over the five years to 2011, Ballina LGA's resident population increased by 1,210 persons – equating to an average annual growth rate of 0.6%.

Consistent with national trends, population growth was skewed to persons aged 65 and over. Accounting for 21% of the resident population, the rise in this cohort has been underpinned by inflows from Sydney and regional NSW. Given its natural amenity, Ballina LGA is a popular destination for retirees.

The rapid expansion in senior citizens has led to more demand for health related services. In response to heightened levels of demand, the number of workers in the Health Care and Social Assistance industry increased by 525 between 2006 and 2011.

Between 2006 and 2011, it is estimated 1,044 additional jobs were created in Ballina LGA, dominated by service denominated industries. Health Care and Social Assistance (+525 jobs), Accommodation and Food Services (+206 jobs) and Education and Training (+177 jobs) all registered sizeable workforce gains.

These industries benefit from population growth, which has occurred in Ballina LGA. When combined with Retail Trade, these industries represent core economic drivers for the region, and more importantly, of employment growth. Growth in these industries is required to offset a diminishing Agriculture, Forestry and Fishing footprint – as evidenced by the 159 job losses over the five years to 2011.

Anchored by Ballina Byron Gateway Airport, Ballina LGA is a popular tourist destination. More recently, the high Australian Dollar has made international travel more affordable, at the expense of traditional domestic locations. With the Australian dollar expected to revert back to long-term average levels, greater visitation to Ballina LGA is foreseeable.

Notably, benefits associated with tourist expenditure support a wide range of industries (and therefore jobs). Weaker domestic travel volumes have been reflected in job reductions in Retail Trade (-41) and Rental, Hiring and Real Estate Services (-33) in Ballina LGA. While there has been some growth in Accommodation and Food Services, the majority of this has come from increased local spending, and therefore is mainly confined to the food services component.

Key economic and demographic drivers which are expected to influence Ballina LGA include:

- DPE projections suggest the current rate of population growth will be maintained over the forecast period (0.5% per annum). While the 65+ age cohort is earmarked to incur the majority of this growth, a small increase in traditional 'family' cohorts (0-19 and 35-49) is anticipated.
- The Australian Dollar is expected to revert back to long term average levels.
- Completion of Pacific Highway upgrades

These trends are implied in our employment projections:

- Ageing to support elevated demand for health and social services – further expansion in the Health Care and Social Assistance workforce and demand for commercial and special use capacity.

- A depreciating Australian dollar to boost domestic visitation – supporting jobs growth in Accommodation and Food Services and Retail Trade, and therefore commercial and retail provision.
- Upgrades to the Pacific Highway improving access to new interstate and regional markets – reflected by job creation in Transport, Postal and Warehousing and demand for industrial floorspace.

A larger workforce is anticipated to result in greater demand for commercial, industrial and special use premises. As such, our estimates of demand indicate **33,690-44,930 sq.m of commercial, 21,463 sq.m of retail, 62,100-82,790 sq.m of industrial** and **33,230–44,300 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **3.4–4.5 hectares of commercial, 4.3 hectares of retail, 10.4–13.8 hectares of industrial** and **4.2–5.5 hectares of special uses** land will be required by 2031.

Our gap assessment has estimated:

- *Supply of business land will exceed demand by 21.7 hectares*
- *Supply of industrial land will exceed demand by 77 hectares*
- *Supply of special uses land will exceed demand by 66.6 hectares*

Our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of Ballina LGA (out to 2031).

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Ballina LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Ballina LGA than suggested by this land assessment, particularly in relation to accommodating new and emerging businesses.

Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) and increasing FSRs across business zoned land represent two practical approaches to delivering more 'business' land and floorspace in Ballina LGA.

### 5.8.2 Retail

We make the following preliminary comments in relation to retail market conditions within Ballina LGA:

- Future population growth is expected to be relatively modest, averaging about 0.5% per annum over the period to 2031.
- Broadly, future population growth (plus tourism growth) translates to retail floorspace demand growth equivalent of about 21,463 sq.m (a 24% uplift) by 2031, equating to a land requirement of about 4.3 hectares.
- Existing retail demand is estimated at 90,900 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 1,839,076 sq.m. Because the retail offer in Ballina is relatively comprehensive for a population of about 42,000 we estimate that leakage beyond the LGA is more than offset by inflows from surrounding LGAs, resulting in a net inflow of about 10% from beyond the LGA, resulting in net demand of about 100,000 sq.m, increasing to 123,650 sq.m by 2031.
- Ballina LGA has an established retail/commercial centres hierarchy that generally services existing residents and tourists reasonably well, as well as serving residents across the surrounding LGAs of Kyogle, Richmond Valley and Lismore.
- The BSGMS indicated that generally the existing centres hierarchy should be maintained, with future small centres identified in growth areas around Lennox Head, Cumbalum (Precincts A and B) and Skennars Head, to cater to future population growth in these areas.

- Ballina Council also encouraged future growth within Ballina Major Regional Centre in order to strengthen and maintain the primacy of this centre in the future. Increased density is encouraged in the town centre core, while additional LFR/bulky goods retail is encouraged in the identified precincts such as Southern Cross Industrial estate near the airport.
- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.
- The Southern Cross Industrial Estate has a range of land use zones including general industrial and bulky goods. The Estate and associated expansion presents an opportunity to deliver large land parcels as a part of the next stage of commercial/industrial land release.

## Section 6: LGA Analysis – Lismore

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Lismore LGA, with the study period being 2011 to 2031.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within the Lismore LGA i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Lismore LGA, the following tasks have been performed:

1. Quantify existing and proposed supply of employment land (zoned)
2. Derive employment projections (by industry)
3. Quantify demand for employment floorspace and land
4. A market gap assessment

The information used in this report has been informed by various local and regional planning policies, Australian Bureau of Statistics data, desktop research, DP&E population projections, DP&E land zone and floorspace ratios (FSR), previous studies as well as considered feedback from the DP&E and Lismore City Council.

### 6.1 Key facts, findings and take-outs

#### 6.1.1 Population growth

- Over the five years to 2011, the resident population of Lismore LGA increased by 1,010 persons – equating to an average growth rate of 0.5% per annum over the five year period.
- With the exception of the 50-64 and 65+ age cohorts, all age cohorts incurred population reductions.



- Between 2006 and 2011, net migration into Lismore LGA totalled 834 persons. By age, people aged 20-34 incurred the largest net loss (-291 persons), while the largest gain come from persons aged 35-49 (505 persons).
- DPE projections suggest population growth will increase in the future (0.6% per annum). The majority of this growth is expected to come through via 65+ persons.

### 6.1.2 Employment trends

- As at 2011, the Lismore LGA entailed 18,713 jobs, accounting for 10% of the North Coast's workforce.
- Health Care and Social Assistance was the largest employing industry, engaging close to one-quarter of the region's workforce.
- In the Lismore LGA, approximately 72.1% of employed residents also worked in the LGA. There is high job containment amongst service denominated industries e.g. Professional, Scientific and Technical Services (79.3%).
- Between 2006 and 2011, Lismore LGA's workforce contracted by 174 jobs.
- Despite the overall reduction, the Health Care and Social Assistance industry created around 450 new jobs between 2006 and 2011.

### 6.1.3 Employment land

- In Lismore LGA, there are 824 hectares of land zoned for urban employment purposes – comprising of 30% Business, 33% Industrial and 37% Special Uses.
- In contrast to the five year period to 2011 (-174 jobs), the Lismore LGA workforce is expected to expand over the forecast period. Over the two decades to 2031, the Lismore LGA workforce is anticipated to expand by 728 jobs.
- Our estimates of demand indicate an additional **15,870–21,180 sq.m of commercial, 25,813 sq.m of retail, 16,500–22,000 sq.m of industrial and 14,140-18,850 sq.m of special use** floorspace will be required by 2031.

- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial, 5.2 hectares of retail, 2.8–3.7 hectares of industrial and 1.8–2.4 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient zoned employment land to accommodate the future employment needs of the Lismore LGA (out to 2031). It is estimated:
  - *Supply of business land will exceed demand by 68.7 hectares*
  - *Supply of industrial land will exceed demand by 185.8 hectares*
  - *Supply of special uses land will exceed demand by 69.9 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Lismore LGA.
- Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Lismore LGA i.e. compared to figures in this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns, centres (i.e. local and neighbourhood) and industrial locations represent a practical approach to delivering more 'employment' land in Lismore LGA.

## 6.2 Literature review

There are several local Council plans and policies of relevance across the Lismore Council LGA, in addition to the FNCRS, including the Lismore Urban Strategy – prepared in 2003, (and updated in 2011) as well as the Lismore Village Development Strategy (1997). The Lismore Urban Strategy (2003) and the Lismore Environmental Study (2010) primarily informed the preparation of the

Lismore LEP 2012, which designates the business and industrial zoned precincts across the LGA. The Lismore City Sustainable Economic Advantage 2020 document prepared in 2012 also outlines and identifies flagship projects in Lismore to assist in creating a regional centre.

The following key points are noted:

- The Lismore Urban Strategy (2003) outlined three key objectives as follows:
  - Identify opportunities for the expansion or redevelopment within the CBD.
  - Identify alternative locations for commercial activities that are not suitable for locating in the CBD.
  - Identify opportunities for developing/expanding other shopping precincts, as long as they do not detract from the CBD.
- The Lismore Urban Strategy encouraged the development of new commercial areas beyond the City Centre, for non-retail related commercial development, including retail warehousing and bulky goods showrooms, around South Lismore. This area has since been designated in the Lismore LEP 2012 as a B6 Zone.
- Small scale retail/commercial facilities in villages across the LGA are generally accommodated within residential/rural village zones. There is virtually no business zoned land outside the Lismore Major Regional Centre (including Goonellabah).
- The Lismore City Sustainable Economic Advantage document identifies the major projects of 2012 including the Lismore Base Hospital redevelopment (note: currently the NSW Budget allows for Stage 3A of this redevelopment), Southern Cross University expansion (to include civil engineering), Lismore City Hall refurbishment and road infrastructure investment.
- The Economic Advantage document also identifies the Lismore City CBD Masterplan and Lismore City Health, Wellbeing and Medium density precinct

(extending from the Masterplan to support the hospital expansion) as flagship projects that will be delivered in the area.

## 6.3 Socio-demographic trends

### 6.3.1 Population change

- At 2011, the resident population of the Lismore LGA was 44,348 persons, an increase of 1,010 persons from 2006.

<b>Year</b>	<b>Estimated Resident Population</b>	<b>Total Change (persons)</b>
2001	42,721	
2006	43,338	617
2011	44,348	1,010

*Source: ABS*

*Source: ABS, MacroPlan Dimasi*

- Similar to other North Coast LGAs, the change in specific age cohorts over this period is quite different to the net result.
- The 50-64 and 65+ age cohorts increased by 1,466 and 572 respectively.
- Conversely, all other age cohorts experienced an outright decline over the five year period.

**Table 6.2**  
**Population By Age (persons) - lismore LGA**

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	12,189	11,885	-304	27%
20-34	7,749	7,589	-160	17%
35-49	9,524	8,960	-564	20%
50-64	8,110	9,576	1,466	22%
65+	5,766	6,338	572	14%
<b>Total</b>	<b>43,338</b>	<b>44,348</b>	<b>1,010</b>	<b>100%</b>

*Source: ABS*

### 6.3.2 Migration movements

Inward and outward movements for the Lismore LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).

- Over the five years to 2011, net migration into Lismore LGA totalled 834 persons.
- People who had previously lived overseas constituted the largest net migration gain with 656 persons, while a net gain also occurred from persons previously living in regional NSW (primarily Newcastle and the Hunter region) and Sydney.
- There was a significant net loss in migration to the benefit of interstate locations (Queensland in particular).
- People aged 20-34 incurred the largest net loss in migration (-291 persons) while the largest gain come from persons aged 35-49 (505 persons).

Table 6.3  
Net Migration by Age - Lismore LGA

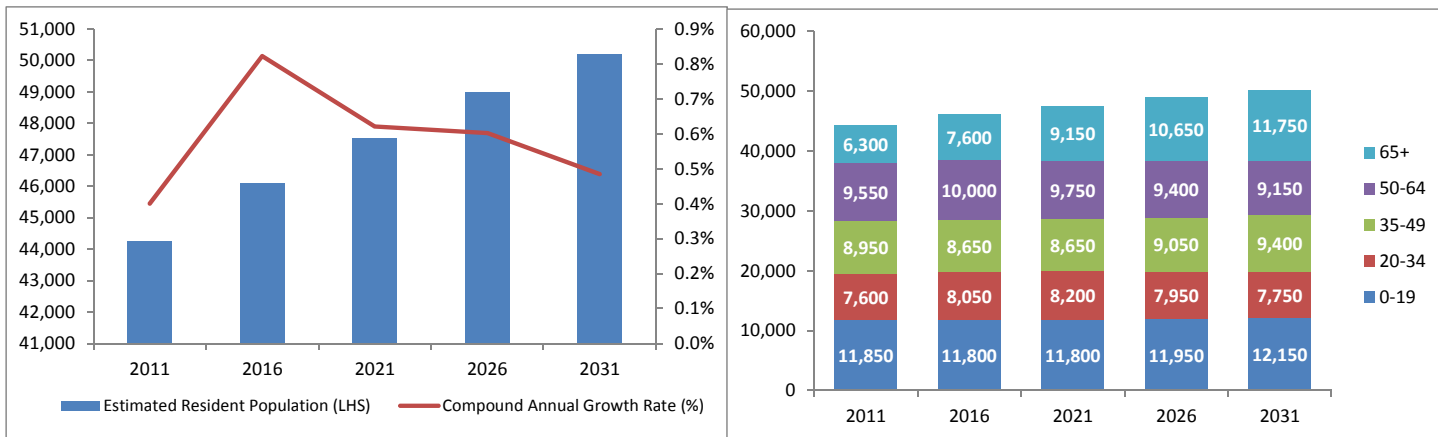
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	84	128	47	27	-94	192
Sydney	104	13	171	108	43	439
Regional NSW	143	171	109	35	18	476
Interstate	-127	-869	-5	5	67	-929
Overseas	126	266	183	64	17	656
<b>Total Net Migration</b>	<b>330</b>	<b>-291</b>	<b>505</b>	<b>239</b>	<b>51</b>	<b>834</b>

Source: ABS

### 6.3.3 Population projections

- According to population projections provided by the DP&E, the Lismore LGA population is projected to expand to 50,200 persons by 2031.
- It is anticipated the population growth will average 0.8% per annum over the five years to 2016. Between 2016 and 2031, population growth is expected to ease (to 0.6% per annum).

Figure 1. Projected Population and population by age (2011 to 2031)



Source: DP&E, MacroPlan Dimasi

- Between 2011 and 2031, the number of persons aged 65+ is projected to expand by 5,850 persons, while a contraction of persons aged 50-64 is expected – a signal of ageing within the local population.
- Growth in all other age cohorts is expected to be marginal.

- In terms of representation, as at 2011, retirees (65+) accounted for just 14% of Lismore's total population; however this is expected to increase to 23% by 2031.

#### 6.3.4 Labour force status

- Of all residents in Lismore LGA, around 80% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 61% i.e. 20,146 of 32,909 residents<sup>5</sup>.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking work).
- The Lismore LGA's labour force composition resembles the North Coast's employment profile (92% employed and 8% unemployed for the North Coast).

**Table 6.4**  
Labour Force Status by Age (number) - Lismore LGA

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	1,213	282	1,495	1,394	2,889
20 - 29	2,909	456	3,365	1,166	4,531
30 - 39	3,356	286	3,642	994	4,636
40 - 49	4,387	289	4,676	1,136	5,812
50 - 59	4,603	266	4,869	1,618	6,487
60 - 69	1,736	78	1,814	2,582	4,396
70 - 79	247	0	247	2,194	2,441
80 - 84	28	0	28	888	916
85+	10	0	10	791	801
<b>Total</b>	<b>18,489</b>	<b>1,657</b>	<b>20,146</b>	<b>12,763</b>	<b>32,909</b>

Source: Census of Population and Housing (2011)

#### 6.3.5 Job containment

- Job self-containment is defined as the percentage of working residents who are employed within the boundaries of the Lismore LGA.

<sup>5</sup> ABS Census of Population and Housing 2011

- Approximately 72.1% of employed residents also worked in the Lismore LGA.
- The remaining 27% of working residents travel either to other North Coast LGAs (16.2%) or locations outside the North Coast (11.7%) for work.
- Of working residents who travel to other North Coast LGA, popular workplace destinations include Ballina (9.2%), Richmond Valley (3.2%), Byron (2.5%), and Kyogle (0.8%) LGAs.

**Table 6.5**  
**Job Containment - Lismore LGA**

	<b>Value</b>
Working residents	18,331
<u>Place of Work (number)</u>	
Lismore	13,212
North Coast LGAs (ex. Lismore)	2,970
Outside North Coast	2,149
<b>Total</b>	<b>18,331</b>
<u>Job Containment (%)</u>	
Lismore	72.1%
North Coast LGAs	16.2%
Other	11.7%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The rate of job containment by industry classification for Lismore LGA is presented in the next table.
- Relative to the all industries average in the Lismore LGA (72.1%), nine industries achieved a higher rate of job containment.
- In contrast to other North Coast LGAs, Professional, Scientific and Technical Services (79.3%) achieved the highest rate of job containment in 2011, followed by Other Services (79.1%) and Health Care and Social Assistance (78.7%).



Table 6.6  
Job Containment by Industry - Lismore LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Professional, Scientific and Technical Services	79.3%	11.2%	9.5%	100.0%
Other Services	79.1%	11.8%	9.1%	100.0%
Health Care and Social Assistance	78.7%	14.5%	6.8%	100.0%
Information Media and Telecommunications	78.7%	14.6%	6.7%	100.0%
Retail Trade	78.5%	14.2%	7.3%	100.0%
Accommodation and Food Services	78.0%	11.8%	10.2%	100.0%
Financial and Insurance Services	77.0%	14.2%	8.8%	100.0%
Agriculture, Forestry and Fishing	74.8%	13.2%	12.0%	100.0%
Rental, Hiring and Real Estate Services	74.2%	16.8%	9.0%	100.0%
<b>Across all industries</b>	<b>72.1%</b>	<b>16.2%</b>	<b>11.7%</b>	<b>100.0%</b>
Education and Training	71.1%	21.4%	7.5%	100.0%
Electricity, Gas, Water and Waste Services	70.8%	19.7%	9.5%	100.0%
Arts and Recreation Services	70.4%	15.8%	13.8%	100.0%
Public Administration and Safety	70.1%	21.5%	8.4%	100.0%
Wholesale Trade	67.0%	22.5%	10.5%	100.0%
Administrative and Support Services	65.2%	10.9%	23.9%	100.0%
Transport, Postal and Warehousing	64.4%	17.9%	17.7%	100.0%
Manufacturing	62.0%	26.5%	11.5%	100.0%
Construction	50.0%	13.6%	36.5%	100.0%
Mining	22.4%	16.4%	61.2%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

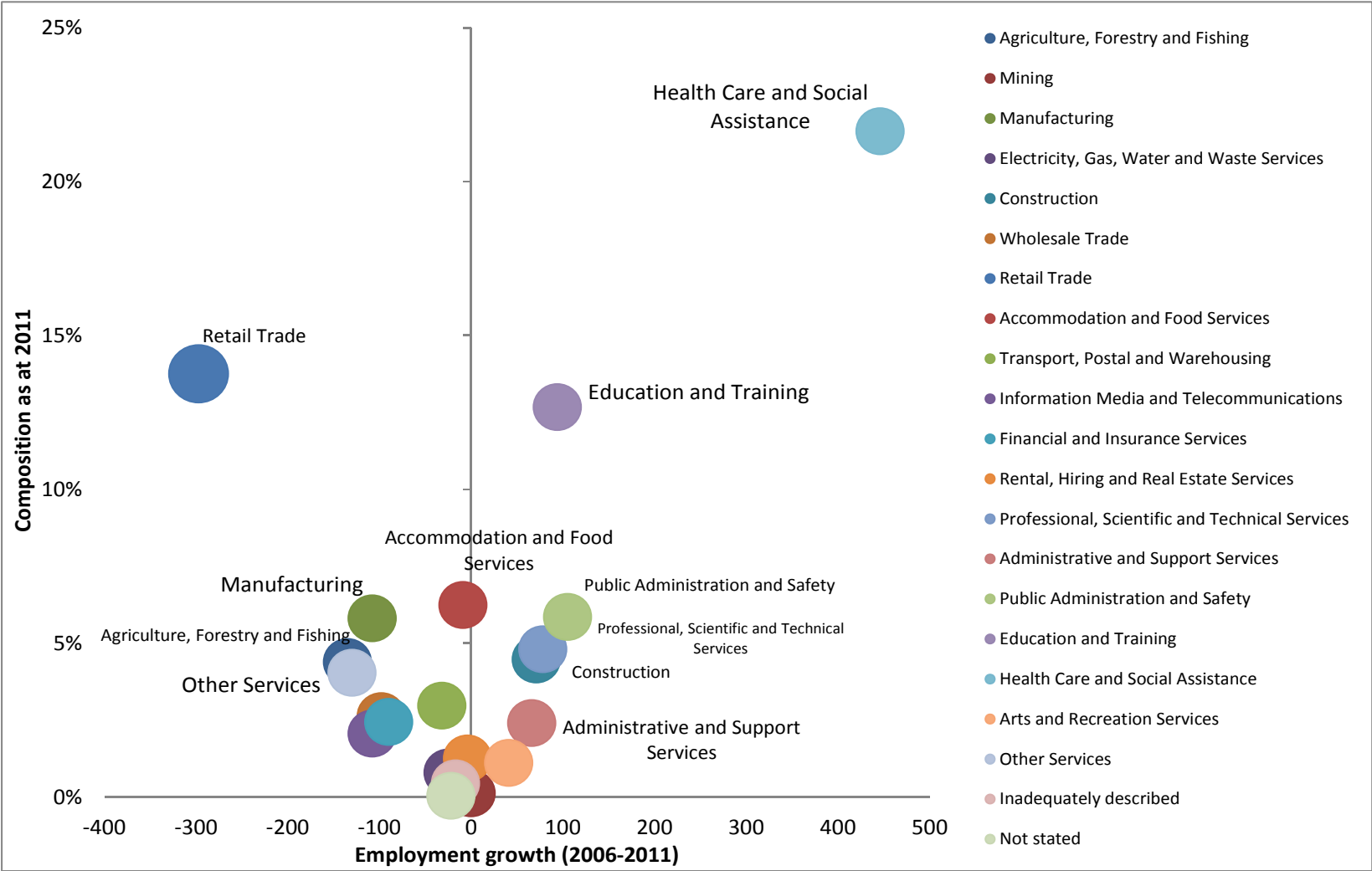
## 6.4 Employment and labour market trends

### 6.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Lismore LGA and identify key emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Lismore LGA supported 18,713 jobs, accounting for just over 10% of total jobs in the North Coast region.
- Health Care and Social Assistance represented the largest employing industry in the LGA, engaging 21.6% of the LGA's workforce in 2011. Retail Trade (13.7%), Education and Training (12.7%) and Accommodation and Food Services (6.2%) were the next largest employing industries.

- The high provision of persons employed in Education and Training industries in comparison to the North Coast average is justified given that there is an university campus in the LGA (Southern Cross University).
- Employment in white collar industries is on par with the broader region, while there are fewer workers engaged in primary and traditional value-add industries such as Construction, Manufacturing and Agriculture, Forestry and Fishing – 14.7% (Lismore LGA) vs. 17.8% (NC region).
- Over the five years to 2011, employment growth in the Lismore contracted by 174 jobs.
- Employment growth within Health Care & Social Assistance accounted for the majority of new jobs – net addition of 446 new jobs.
- The Retail Trade and Agriculture, Forestry and Fishing industries both incurred substantial workforce contractions over the five years to 2011 – a net loss of 297 and 135 jobs respectively.
- High representation amongst the Health Care & Social Assistance is a result of solid growth in 50+ year olds over the five years to 2011. However, with this expected to translate into similar rates of growth amongst 65+ year olds in the future, weak growth in working age residents (i.e. 20-34 years) will constrain the ability of Lismore LGA to deliver required health services.
- The Lismore LGA is aware of the influence the ageing population will have on its local employment base. A key employment asset is its hospital facilities, not just for Lismore but for the broader North Coast region.

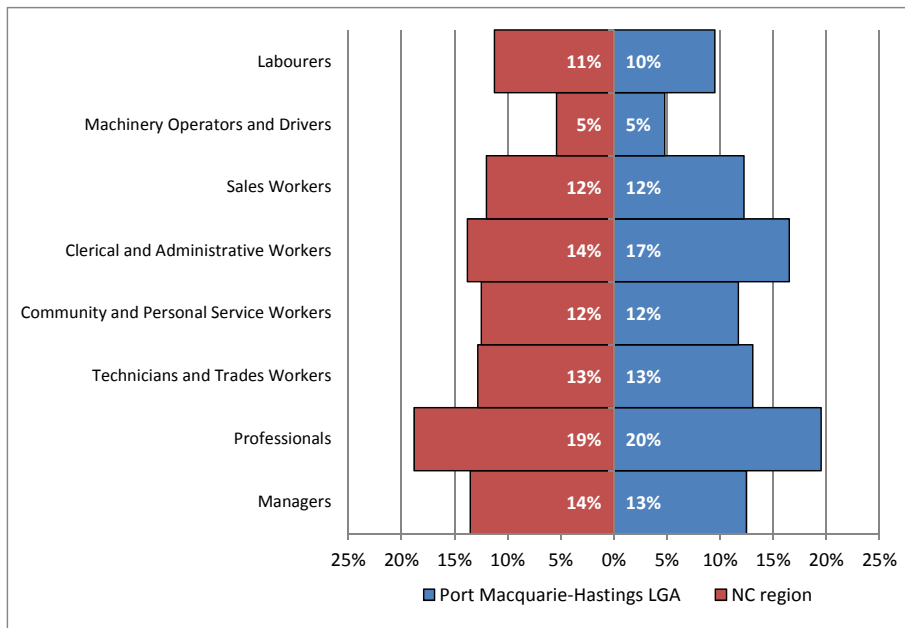
Figure 2. Employment composition and growth by industry, Lismore LGA



### 6.4.2 Occupation profile

- As at Census 2011 the dominant occupation category for workers in the Lismore LGA was 'Professionals', accounting for around 20% of its workforce, followed by 'Clerical and Administrative Workers' (17%).

**Figure 3. Occupation Composition (2011)**



Source: ABS, MacroPlan Dimasi

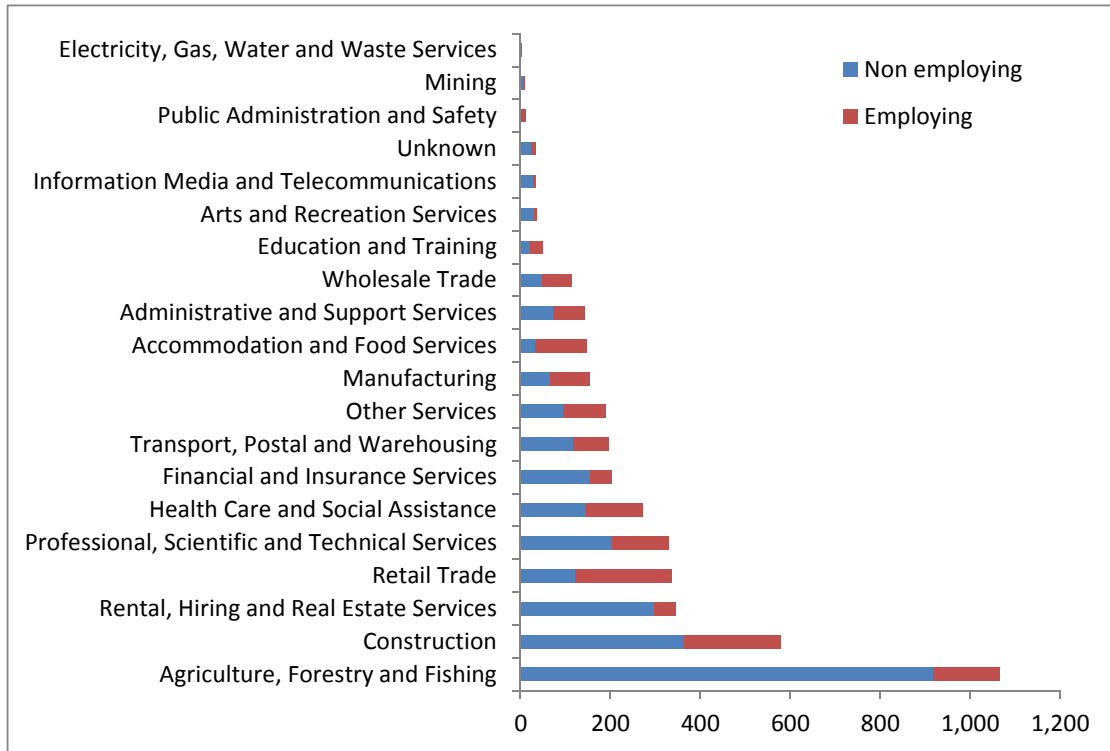
- In comparison to the broader North Coast region, Lismore exhibits a skew to Clerical and Administrative occupations. The composition of other occupations is similar to the broader North Coast average.

### 6.4.3 Business composition & change

- As at June 2011, there were 4,258 businesses operating within the Lismore LGA, with 65% being non-employing/sole trading.
- While it only supports 4.4% of total jobs within the LGA, Agriculture, Forestry and Fishing industry accounts for the majority of businesses (1,067).

- In relation to employing businesses, Construction and Retail Trade dominate, each consisting of 214 businesses as at June 2011. Notably, the majority of these businesses employ between 1-4 workers (over 70%).

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, just six new businesses were created in Lismore LGA – the majority of which were non-employing.
- Rental, Hiring and Real Estate Services (+29) and Information Media and Telecommunications (+15) incurred business count increases, while a large reduction was observed in the Agriculture, Forestry and Fishing industry (-45) industry.

Table 6.7  
Business Composition and Change - Lismore LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	2	-6	-4
Retail Trade	6	4	10
Accommodation and Food Services	-11	8	-3
Education and Training	1	2	3
Construction	7	0	7
Public Administration and Safety	0	3	3
Manufacturing	-3	14	11
Professional, Scientific and Technical Services	-4	-3	-7
Other Services	4	-12	-8
Transport, Postal and Warehousing	2	-1	1
Agriculture, Forestry and Fishing	-25	-20	-45
Administrative and Support Services	9	-3	6
Wholesale Trade	-7	-13	-20
Rental, Hiring and Real Estate Services	11	18	29
Financial and Insurance Services	20	-13	7
Arts and Recreation Services	-1	0	-1
Electricity, Gas, Water and Waste Services	0	-3	-3
Information Media and Telecommunications	9	6	15
Mining	0	0	0
Not Classified	-4	9	5
<b>Total</b>	<b>16</b>	<b>-10</b>	<b>6</b>

Source: ABS

#### 6.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- The growth in white collar employing industries over the past five years reflects the growing diversity of the Lismore economy. This trend is expected to continue as demand for commercial premises and suitable zoned land will be required to facilitate the growth in the proportion of Lismore's population with a higher skills base and level of education.
- The LGA's ageing population with fewer younger people will present a number of issues in the future. Job opportunities to younger residents is encouraged which will assist in mitigating the outflow of these people to south-east QLD and elsewhere in NSW.

## 6.5 Employment Land Supply

### 6.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land within the Lismore LGA.
- There are three core employment land use categories in the Lismore LGA, including Business, Industrial and Special Uses.
- The next table presents the full complement of urban employment land use zones in the Lismore LGA, as well as the quantum of land assigned to each land use type.

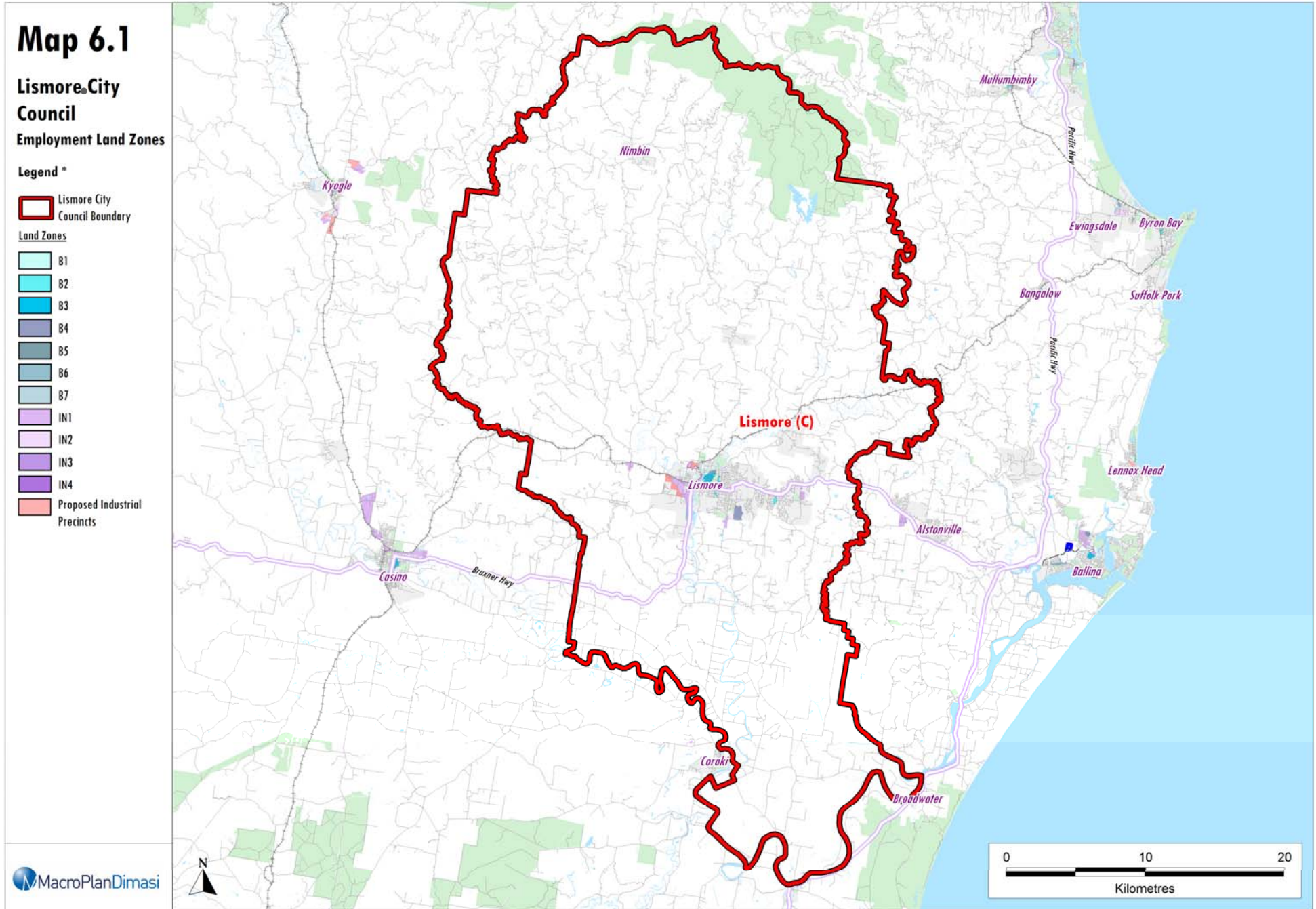
Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	21.2	3%
	B2. Local Centre	18.6	2%
	B3. Commercial Core	79.6	10%
	B4. Mixed Use	67.4	8%
	B6. Enterprise Corridor	60.4	7%
	<b>Total</b>	<b>247.2</b>	<b>30%</b>
Industrial	IN1. General Industrial	214.3	26%
	IN2. Light Industrial	60.2	7%
	<b>Total</b>	<b>274.6</b>	<b>33%</b>
Special Uses	SP2. Infrastructure	302.8	37%
	<b>Total</b>	<b>302.8</b>	<b>37%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>824.5</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- Overall, there are approximately 824.5 hectares of urban employment land in the Lismore LGA.

- From a zoned land perspective, representation from each category is relatively even – ranging between 30% and 37%.
- Of all categories, land zoned for Special Uses is the largest.
- There are 247.2 hectares of land zoned for business purposes, shared between B1 Neighbourhood Centre (21.2 hectares), B2 Local Centre (18.6 hectares), B3 Commercial Core (79.6 hectares), B4 Mixed Use (67.4) hectares) and B6 Enterprise Corridor (60.4 hectares) zone.





# Map 6.2

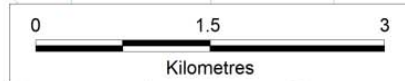
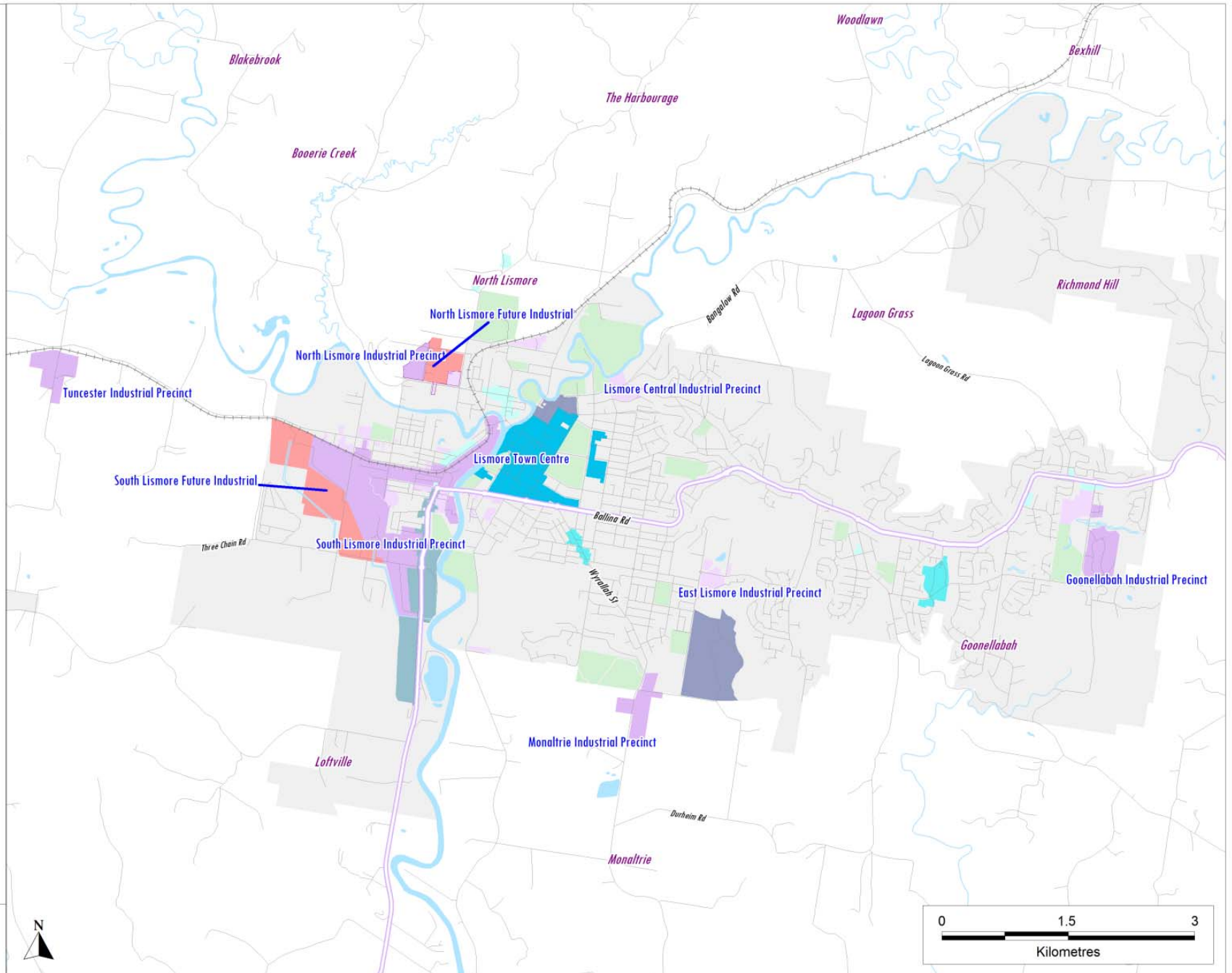
## Lismore •

### Employment Land Zones

Legend \*

Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 6.5.2 Industrial – Existing supply

- Two specific industrial land use zones apply in Lismore LGA i.e. IN1 General Industrial and IN2 Light Industrial.
- From an industrial land perspective, the IN1 General Industrial zoning accounts for 78% of zoned industrial land.
- At present, there are three key industrial precincts in the Lismore LGA; South Lismore, Goonellabah and North Lismore.
- Details of each precinct are presented in the following table.

**Table 6.9**  
**Established Industrial Precincts - Lismore LGA**

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
South Lismore Industrial Precinct	140.0	110.6	79%
Goonellabah Industrial Precinct	35.0	21.0	60%
North Lismore Industrial Precinct	33.0	14.9	45%
Tuncester Industrial Precinct	22.0	6.6	30%
Monaltrie Industrial Precinct	20.5	6.2	30%
East Lismore Industrial Precinct	14.5	10.9	75%
Central CBD	9.6	7.7	80%
<b>Total</b>	<b>274.6</b>	<b>177.8</b>	<b>65%</b>

*Source: Draft Lismore Growth Management Strategy 2014-2034, MacroPlan Dimasi,*

Key findings pertinent to identified industrial precincts include:

- In total, seven industrial precincts have been identified.
- Consisting of 140 hectares of land, the **South Lismore Industrial Precinct** (SLIP) is the largest of the identified precincts (see appendix in section 6.9).
- Positioned south of Lismore CBD, the SLIP is within 1-2 kilometres of the town centre and is directly connected to the Bruxner Highway via Three Chain Road.

Key industries operating in the SLIP include Construction Supplies, Local manufacturers and Warehouses.

- Of the total land zoned for industrial uses in Lismore, it is estimated that approximately 79% is developed. The site is constrained by vehicle access and flood risk issues. As such, it is estimated approximately 20 hectares is available for future development.
- According to the Draft Lismore Growth Management Strategy 2014 – 2034, **Goonellabah Industrial Precinct** (33.8 hectares) is the only industrial precinct with little or no supply of undeveloped industrial land. The site is not flood prone and is close to Ballina Road and the Bruxner Highway. As a result, it is an advantageous site for industrial expansion. We estimate that approximately 60% of the site is developed with 13.5 hectares of undeveloped land.
- **Of the total industrial land, it is estimated approximately 65% of industrial land has been developed, equating to approximately 97 hectares.**
- It is estimated there is 58 hectares of zoned land available for future development (given an average floor space ratio of 0.6:1).

### 6.5.3 Industrial – Future supply

- MacroPlan Dimasi has identified 92 hectares of potential future industrial land within the Lismore LGA.
- The majority of future potential industrial land is positioned around existing precincts with 32 hectares expected for future development at the North Lismore Industrial Precinct.
- The table below presents the proposed precincts and land size.

**Table 6.10**  
**Future Industrial Precincts - Lismore LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
South Lismore Industrial Precinct	60.0	1 - 10
North Lismore Industrial Estate	18.1	1 - 10
<b>Total</b>	<b>78.1</b>	

*Source: MacroPlan Dimasi*

- Given that it is an expansion of an existing precinct (to the west of the current precinct), additional industrial land at **South Lismore Industrial Precinct** could be delivered within the next decade. At present, the site is highly developed (only 2 hectares is available for development). The proposed expansion will cover 60 hectares of land west of the current precinct.
- According to the Draft Growth Management Strategy 2014 – 2034, “South Lismore contains the largest industrial precinct and includes vacant undeveloped land for future expansion”. However, Council has been working with owners of the undeveloped land to address future road network and vehicle access needs and flood risk issues. As such, the development potential of the site may be compromised.
- The **North Lismore Industrial Estate** future industrial precinct is located in North Lismore with anticipated development expected in the next 10 years. Currently there is 33 hectares of zoned industrial land, of which approximately 45% is developed. Subsequently, 18 hectares is available for future expansion (see appendix in section 6.9).

#### 6.5.4 Retail & Commercial – Existing supply

The Lismore LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 6.3 and Map 6.4.

- The Lismore LGA centres hierarchy generally consists of the following structure:
  - Lismore Major Regional Centre.



- Goonellabah (Town) (Note: This is effectively part of the Lismore Major Regional Centre).
- Smaller scale villages (such as Nimbin, Dunoon and Clunes).

### **Lismore Major Regional Centre**

- The Lismore Major Regional Centre is the primary retail and commercial activity centre in the Lismore LGA, occupying around 244 ha of business zoned the land, including 18.2 ha of B1 zoned land, 18.6 ha of B2 zoned land, 79.6 ha of B3 zoned land and 67.4 hectares of B4 zoned land
- The Lismore City Centre contains the largest concentration of retail facilities within the Lismore LGA, i.e. the commercial area generally bound by Ballina Road in the south, Union Street to the West and Hunter Street to the east. The City Centre includes two major retail centres, including one sub-regional centre, summarised below:
  - Lismore Square, a freestanding shopping centre and the largest retail centre within the City Centre. This is the only sub-regional centre within Lismore LGA, comprising around 28,900 sq.m of retail floorspace, anchored by Big W and Kmart discount department stores, as well as Woolworths and Coles supermarkets.
  - Lismore Central, a single supermarket based shopping centre located on the corner of Carrington Street and Conway Street currently providing approximately 6,100 sq.m of retail floorspace.
- The City Centre is quite dispersed, with Keen Street, Woodlark Street, Magellan Street and Molesworth Street being the dominant focus for retailing, including a large Lincaft store. Other uses are generally non-retail (Lismore Technical College, St Paul's Memorial Hall, Lismore Presbyterian Church).
- Elsewhere throughout the City Centre, national retailers represented include Sportsgirl, Millers, Ice, Mensland Menswear, Spotlight, Betta Electrical and Jeans House.

- The City Centre also accommodates major civic, administrative, educational, commercial and community facilities. The Lismore Base Hospital is located adjacent to the city centre.
- In total, the City Centre is estimated to support around 400,000 sq.m of retail and commercial/shop-front floorspace (according to the Lismore Council), of which about 70,000 - 80,000 sq.m is estimated to be retail floorspace.

#### Goonellabah

- Goonellabah is located a few kilometres east of Lismore CBD, within the broader Lismore Major Regional Centre. Goonellabah contains three supermarket anchored neighbourhood centres, namely;
  - Goonellabah Village, which provides some 6,100 sq.m of retail floorspace, anchored by a Target Country discount department store and a Coles supermarket.
  - The adjoining Goonellabah SC, which opened in late 2012, is anchored by a Woolworths supermarket of approximately 3,400 sq.m. The centre also provides more than 1,500 sq.m of specialty retail floorspace.
  - Eastpoint SC, anchored by an IGA supermarket of around 1,000 sq.m and provides a total retail floorspace in the order of 1,500 sq.m, is also located at Goonellabah.

#### **Other centres/villages**

There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:

- Nimbin: A small commercial main street in Nimbin providing approximately 2,000 – 2,500 sq.m of retail, small scale business and medical/community floorspace.
- Other: There is a small provision of retail at villages across the LGA, such as Dunoon, Clunes and The Channon.

# Map 6.3 Lismore City Council

## Retail Provision Legend \*

Lismore City Council Boundary

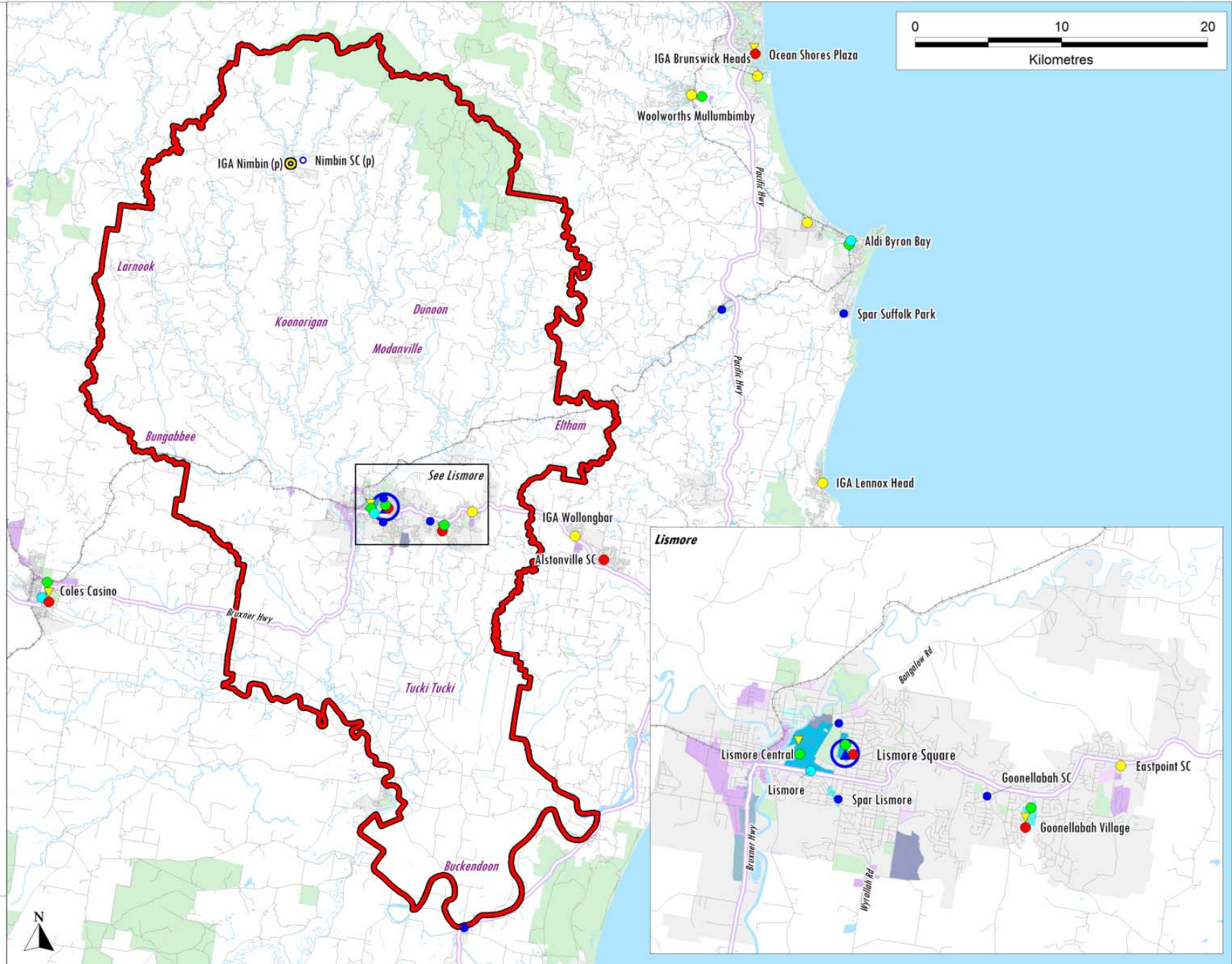
### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

### Retail Competition

- Sub-Regional Centre
- Big W
- Target
- Woolworths
- Coles/Bi-Lo
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)

\* Hollow symbols indicate proposed stores





# Map 6.4

## Lismore City Council

### Bulky / Homemaker Goods Retailing

#### Legend \*

Lismore City Council Boundary

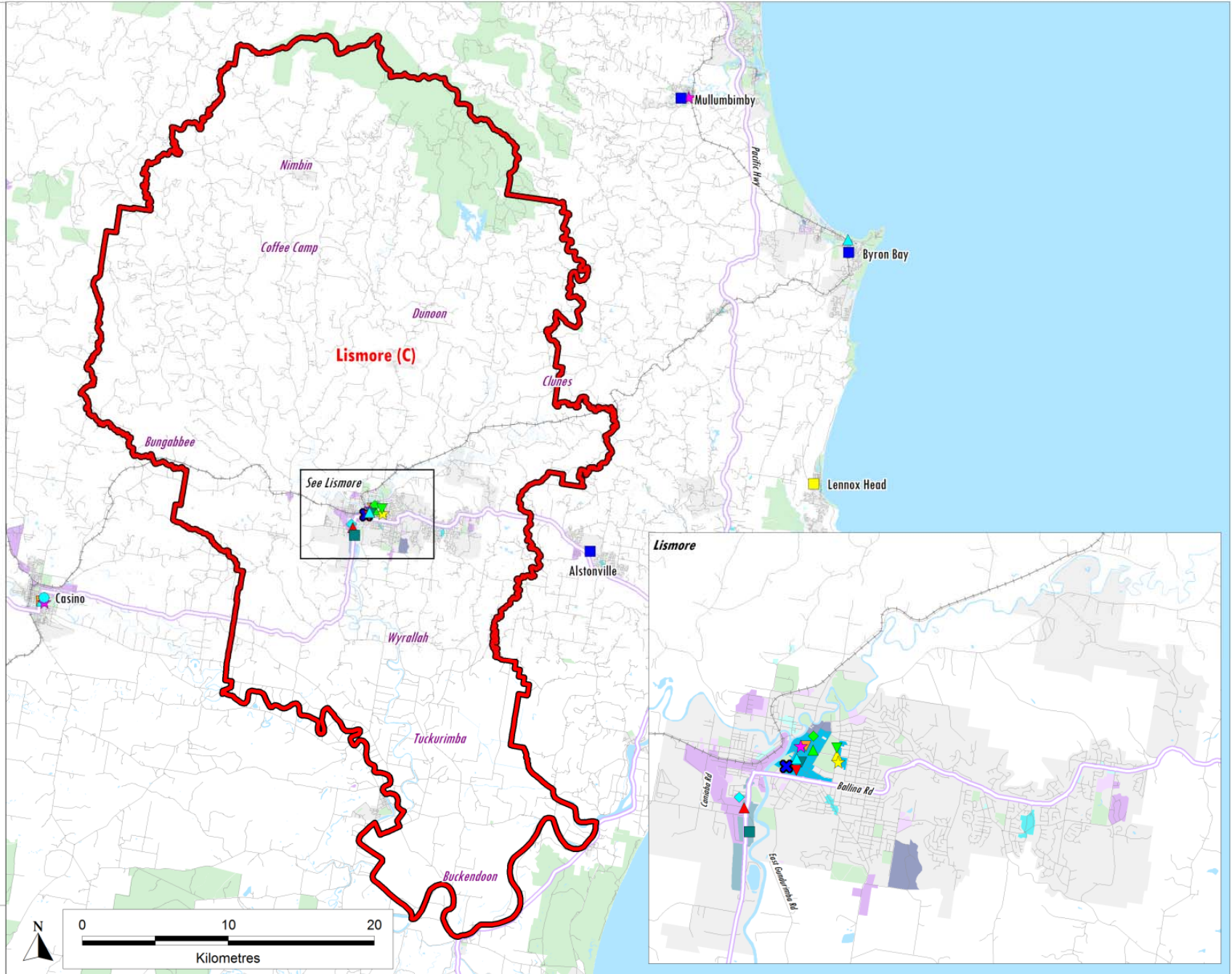
#### Bulky Goods Retailers

- Bunnings Warehouse
- Godfreys
- House
- Lincraft
- Spotlight
- Autobarn
- Bursons
- Repco
- Super Cheap Auto
- Betta Home Living
- Dick Smith
- Fantastic Furniture
- Harvey Norman
- Officeworks

#### Land Zones

- |    |     |
|----|-----|
| B1 | B7  |
| B2 | IN1 |
| B3 | IN2 |
| B4 | IN3 |
| B5 | IN4 |
| B6 |     |

\* Hollow symbols indicate proposed stores



### **Business zoned land capacity for retail and commercial floorspace**

Table 6.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **247.2 hectares of business zoned land** within the Lismore LGA, of which 21.2 ha is B1 zoned land, about 18.6 ha is B2 zoned land and about 79.6 ha is B3 zoned land
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is a significant B4 mixed use land parcel 58.3 ha within East Lismore that is virtually totally vacant and a large B6 enterprise corridor parcel at South Lismore that has significant capacity.
- We have applied FSRs for each business zone type from the Lismore LEP 2012 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- We estimate the indicative retail/commercial floorspace capacity of existing business zones in the Lismore LGA to be in the order of 3,945,675 sq.m.
- We estimate that there is net 'inflow' (i.e. negative leakage) from the LGA in the order of about 10%, given the likely inflow of expenditure from nearby Casino and Kyogle, due to the relative size and mix of the retail offer in these LGAs compared with Lismore. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 6.11**  
Lismore LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1*	21.2	0.9	184,760
Total B2*	18.6	1.2	213,974
Total B3	79.6	2.6	2,069,028
Total B4*	67.4	1.4	943,580
Total B6	<u>60.4</u>	0.9	<u>543,333</u>
<b>Total LGA</b>	<b>247.2</b>		<b>3,954,675</b>

*\*NSW North Coast region average for zone type*

*Source: Lismore LEP 2012, MapInfo; NSW Govt; MacroPlan Dimasi*

### 6.5.5 Retail & Commercial – Future supply

There are several proposed retail developments of significance that are likely to affect the future supply and demand of retail floorspace within the Lismore LGA. The developments most relevant to our analysis include:

- Development approval has been granted to construct an Aldi supermarket of approximately 1,200 – 1,500 sq.m in Goonellabah.
- Development Approval has been granted for the proposed subdivision and subsequent shopping centre development on Sibley Street, Nimbin. Stage 1 includes the provision of a supermarket and 6 specialty shops over approximately 2,400 sq.m of floorspace. Stage 2 of the development will comprise subdividing the subject land into 20 residential lots and 3 commercial lots.
- A Masters Home Improvement store is under construction in Lismore, expected to provide more than 9,800 sq.m of bulky goods/homemaker floorspace upon completion in early 2015.

### 6.5.6 Special Uses – Existing supply

- As per the Lismore LEP 2012, there is one relevant land use zone within the special uses category; SP2 Infrastructure.
- The cemetery, crematorium, dam and waste management facility have been removed from our estimates of urban zoned employment land for this category.
- As such, the SP2 Infrastructure category consists of 301.8 hectares.
- The major facilities identified within this land use zoning include the Southern Cross University Lismore Campus (186 hectares), the Lismore Regional Airport (107 hectares), the Lismore Base and St Vincent's Private Hospitals (8.2 hectares) as well as the Liquid Fuel Depot (0.6 hectares). Details of each precinct are presented in the following table.

**Table 6.12**

**Identified Special Use Sites - Lismore LGA**

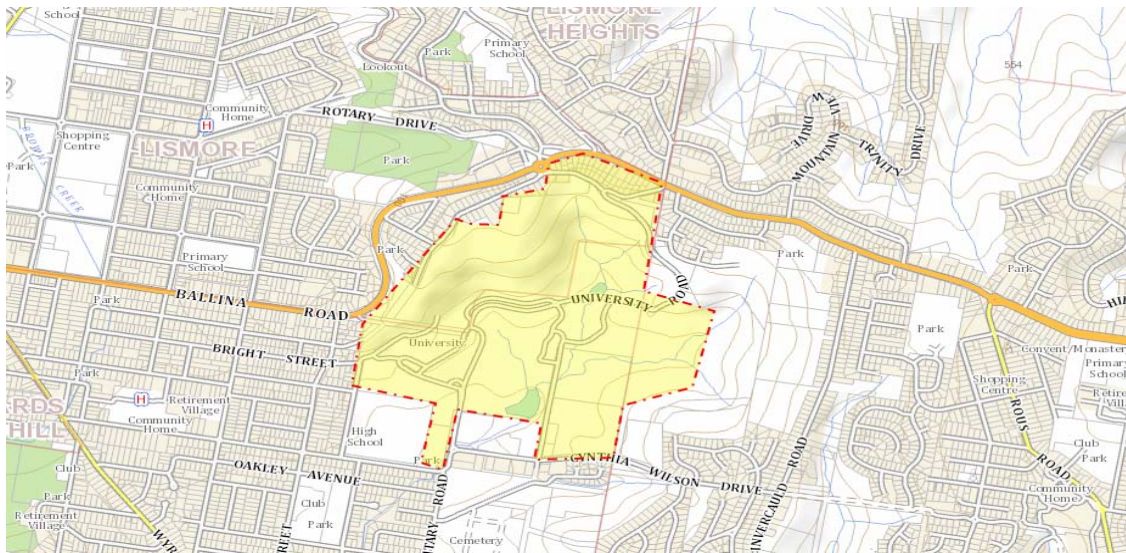
<b>Name</b>	<b>Total Area (hectares)</b>
Southern Cross University (Lismore campus)	186.0
Lismore Airport	107.0
Lismore Base & St Vincents Private Hospitals	8.2
Liquid Fuel Depot	0.6
<b>Total</b>	<b>301.8</b>

*Source: MacroPlan Dimasi*

- The classification 'educational establishment' constitutes the largest share of SP2 zoning within the LGA. Of the land allocated to the Southern Cross University Lismore Campus (186 hectares), approximately three-quarters of developable land has been utilised (due to constraints).
- We estimate that there is approximately 46.5 hectares to be developed into the future. The campus consists of a law court, environmental science laboratories,

and health and fitness facilities. There is also a health clinic on campus which provides allied health services to the general public, staff and students.

**Figure 5. Southern Cross University Regional Context**

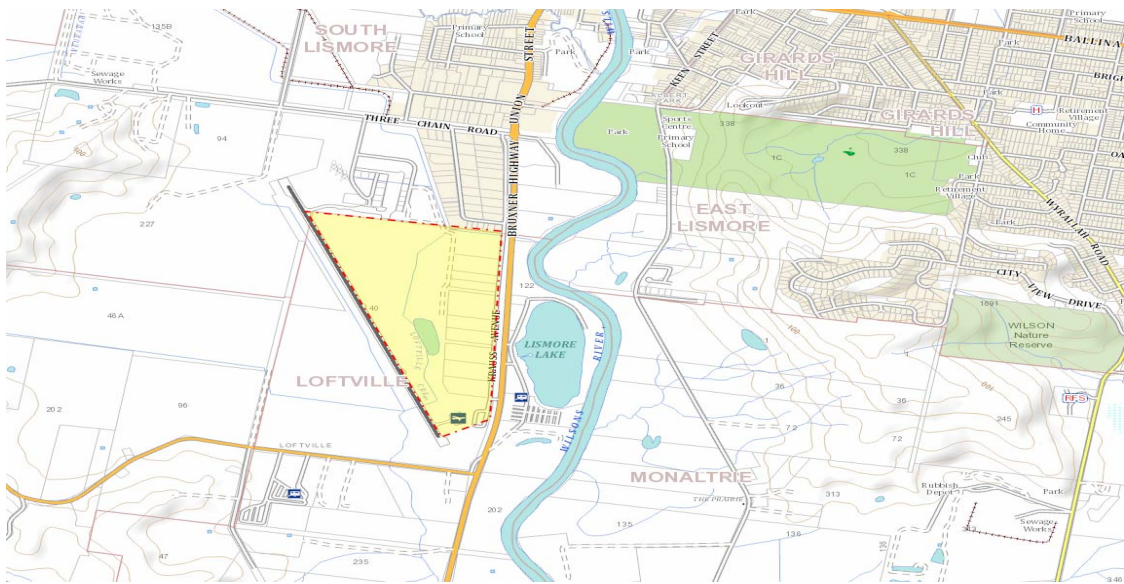


Source: SIX maps (NSW Department of Planning and Environment)

- The Lismore Regional Airport encompasses a total land area of 107.4 hectares, dedicated to SP2. We estimate that approximately 80.55 hectares of this land has been developed, allowing for 26.85 hectares of land to be developed into the future. This airport is serviced by Rex with five flights to and from Sydney Airport each day. The terminal has a café, a business lounge as well as meeting rooms.



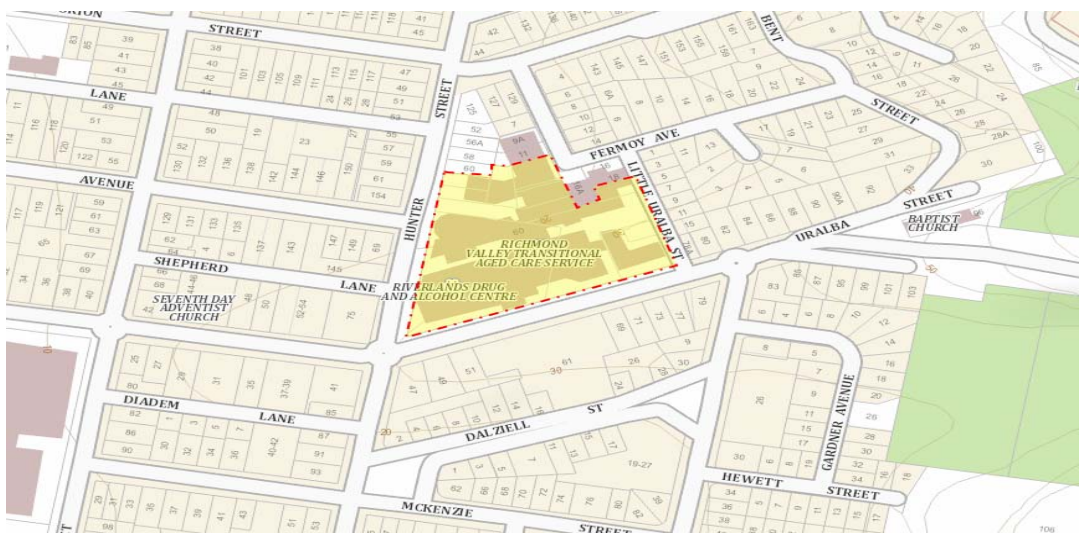
**Figure 6. Lismore Regional Airport Regional Context**



Source: SIX maps (NSW Department of Planning and Environment)

- In terms of land dedicated to health facilities (8.2 hectares), the Lismore Base Hospital and the St Vincent’s Private Hospital Lismore constitute the greatest share. The Lismore Base Hospital encompasses an area of 2.7 hectares, of which we estimate that approximately 2.16 hectares is developed and 0.54 hectares is available for future development.

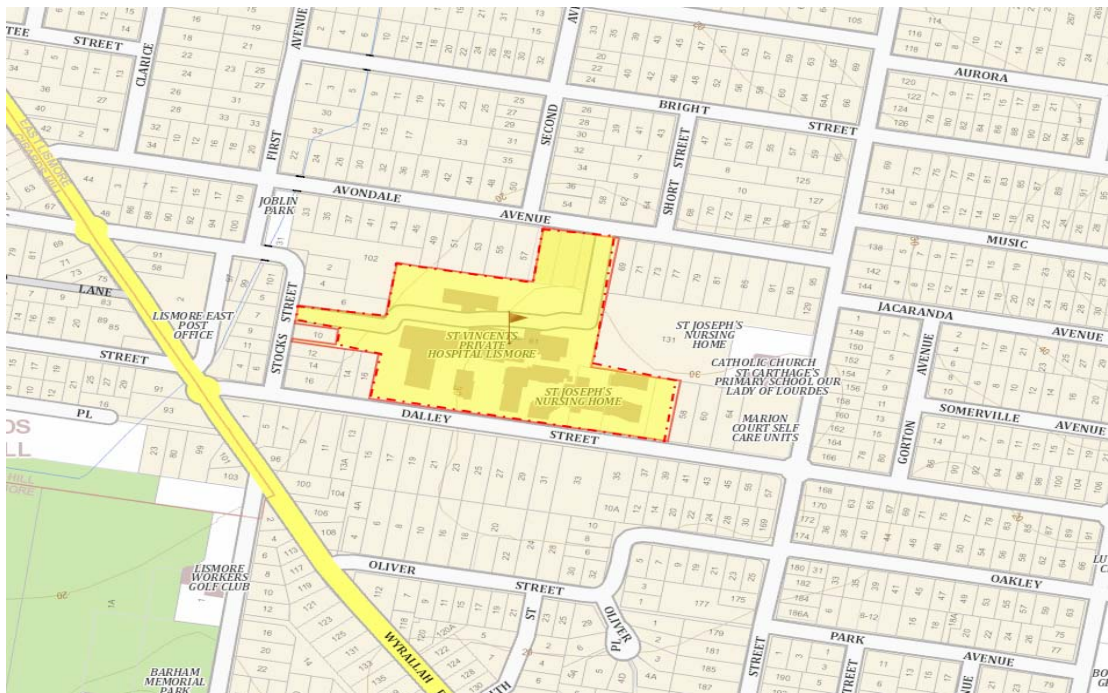
**Figure 7. Lismore Base Hospital Local Context**



Source: SIX maps (NSW Department of Planning and Environment)

- The St Vincent's Private Hospital Lismore covers a land area of 4 hectares. It is estimated that 2 hectares is developed, with a remaining 2 hectares available to be developed into the future. St Vincent's Private Hospital is an accredited acute surgical, medical, rehabilitation and palliative care hospital which provides a wide range of hospital services.

**Figure 8. St Vincents Private Hospital Lismore Regional Context**



Source: SIX maps (NSW Department of Planning and Environment)

### 6.5.6 Special Uses – Future supply

- Currently, the Lismore Base Hospital is undergoing an \$80 million redevelopment. Once complete (2015), the hospital will include a new five level hospital building housing a new emergency department, expanded medical imaging capacity, improved facilities for renal services and shell space for theatres in the future.

**Figure 9. Artist's Impression of the Lismore Base Hospital**



*Source: NSW Health 2014*

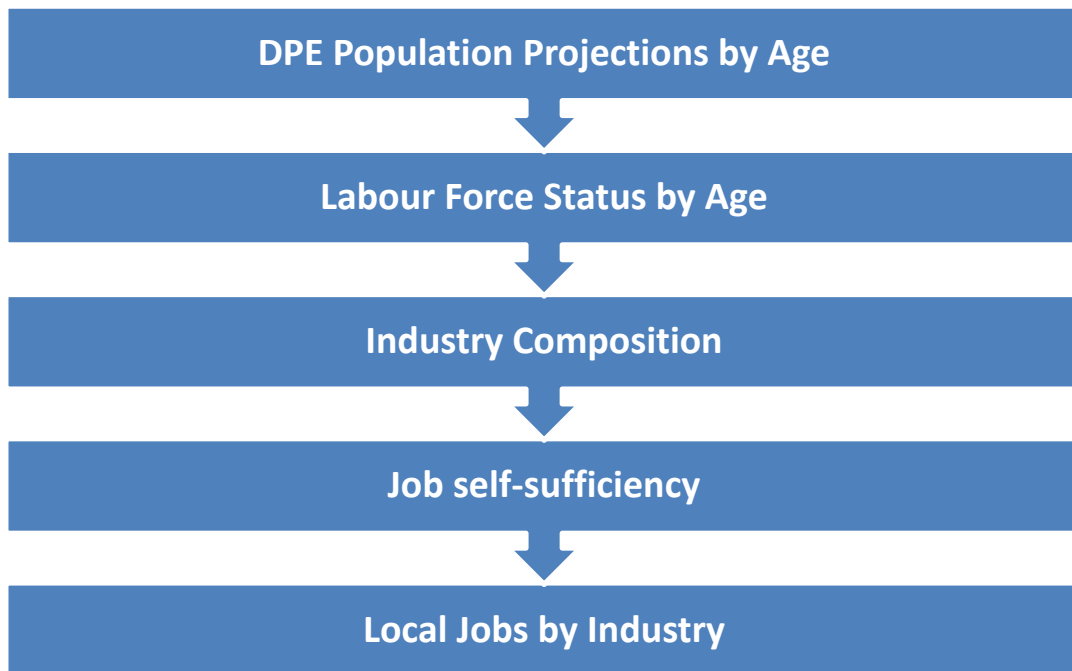
- Additionally, Southern Cross University is currently undergoing construction of a new learning centre which will encompass approximately 5,500sqm and is expected to be complete in 2016. Included in this project is a four level library, meeting rooms, staff rooms, offices, leisure spaces, and a coffee shop.

## **6.6 Demand for employment land**

### **6.6.1 Methodology**

- In order to derive the quantum of commercial, industrial and special use land required in the Lismore LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Lismore LGA to generate jobs.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Lismore LGA.





- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 6.6.2 Employment Projections

- In contrast to the five year period to 2011 (-174 jobs), the Lismore LGA workforce is expected to expand over the forecast period. Over the two decades to 2031, the Lismore LGA workforce is anticipated to expand by 728 jobs.
- Our employment projections imply a 362 job increase over the ten years to 2021 (to 19,075 jobs).

- However, it is expected a similar rate of expansion will continue beyond 2021. Over the decade to 2031, employment in the LGA is expected to expand by 366 jobs, to 19,441.
- Expanding by 36 jobs per annum over the forecast period (2011-2031), workforce growth during this period is expected to exceed that observed during the 2006 and 2011 (average job loss of 35 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+229) and Education and Training (+175).
- Conversely, outright job losses is predicted for three industries i.e. Agriculture, Forestry and Fishing (-142), Manufacturing (-97), and Information Media and Telecommunications (-11).

**Table 6.13**  
Employment by Industry - Lismore LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	4,048	4,158	4,277	229
Education and Training	2,372	2,480	2,547	175
Retail Trade	2,573	2,651	2,722	149
Accommodation and Food Services	1,168	1,221	1,283	115
Construction	837	858	894	57
Professional, Scientific and Technical Services	900	935	953	53
Wholesale Trade	492	534	544	52
Public Administration and Safety	1,096	1,125	1,147	51
Financial and Insurance Services	458	492	502	44
Other Services	756	782	797	41
Rental, Hiring and Real Estate Services	236	267	272	36
Transport, Postal and Warehousing	556	572	583	27
Administrative and Support Services	450	461	470	20
Electricity, Gas, Water and Waste Services	149	153	156	7
Mining	23	23	29	6
Arts and Recreation Services	208	218	214	6
Information Media and Telecommunications	387	369	376	-11
Other*	94	4	4	-90
Manufacturing	1,088	1,030	991	-97
Agriculture, Forestry and Fishing	822	744	680	-142
<b>Total</b>	<b>18,713</b>	<b>19,079</b>	<b>19,441</b>	<b>728</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form typically required by each industry.
- The following table entails the concordance used to allocate ABS ANSZIC employment industry figures into specific land use categories.

**Table 6.14**  
Industry and Land Use Conversion Matrix - Lismore LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

**Table 6.15**  
Employment Additions by Land Use Type - Lismore LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	0	0	3	3	0	0
Construction	2	4	19	32	0	0
Wholesale Trade	34	8	8	2	0	0
Retail Trade	75	67	4	4	0	0
Accommodation and Food Services	37	44	16	19	0	0
Transport, Postal and Warehousing	3	2	13	9	0	0
Information Media and Telecommunications	0	7	0	0	0	0
Financial and Insurance Services	34	9	0	0	0	0
Rental, Hiring and Real Estate Services	31	5	0	0	0	0
Professional, Scientific and Technical Services	35	18	0	0	0	0
Administrative and Support Services	11	9	0	0	0	0
Public Administration and Safety	29	22	0	0	0	0
Education and Training	11	7	0	0	97	60
Health Care and Social Assistance	22	24	0	0	88	95
Arts and Recreation Services	10	0	0	0	0	0
Other Services	26	15	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 6.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities present the average floorspace needed to accommodate new workers. That is, for every new job in manufacturing, an additional 250sqm of industrial floorspace is required (as evidenced in table 6.16).

**Table 6.16**  
Indicative Employment Density by Industry and Land Use Type - Lismore LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

*Source: MacroPlan Dimasi*

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in a floorspace additional (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

Table 6.17  
Additional Floorspace by Industry under the Base Scenario (sqm) - Lismore LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	120	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	10	10	810	660	0	0
Construction	60	110	2,890	4,850	0	0
Wholesale Trade	1,010	250	1,680	410	0	0
Retail Trade	2,980	2,670	550	490	0	0
Accommodation and Food Services	1,850	2,180	2,380	2,800	0	0
Transport, Postal and Warehousing	100	70	2,600	1,750	0	0
Information Media and Telecommunications	0	210	0	0	0	0
Financial and Insurance Services	860	240	0	0	0	0
Rental, Hiring and Real Estate Services	780	130	0	0	0	0
Professional, Scientific and Technical Services	870	450	0	0	0	0
Administrative and Support Services	270	220	0	0	0	0
Public Administration and Safety	740	540	0	0	0	0
Education and Training	430	270	0	0	4,850	3,010
Health Care and Social Assistance	880	950	0	0	5,300	5,690
Arts and Recreation Services	400	0	0	0	0	0
Other Services	1,040	600	0	0	0	0
<b>Total</b>	<b>12,280</b>	<b>8,900</b>	<b>10,920</b>	<b>11,080</b>	<b>10,150</b>	<b>8,700</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **12,280 sq.m of commercial**, **10,920 sq.m of industrial** and **10,150 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **8,900 sq.m of commercial**, **11,080 sq.m of industrial** and **8,700 sq.m of special uses** floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in table 6.18.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a 'truer' depiction of likely actions and decisions made by businesses.

**Table 6.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Lismore LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	90	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	10	10	610	490	0	0
Construction	50	80	2,170	3,630	0	0
Wholesale Trade	760	180	1,260	310	0	0
Retail Trade	2,240	2,000	410	370	0	0
Accommodation and Food Services	1,390	1,630	1,780	2,100	0	0
Transport, Postal and Warehousing	70	50	1,950	1,320	0	0
Information Media and Telecommunications	0	160	0	0	0	0
Financial and Insurance Services	650	180	0	0	0	0
Rental, Hiring and Real Estate Services	580	100	0	0	0	0
Professional, Scientific and Technical Services	650	340	0	0	0	0
Administrative and Support Services	200	170	0	0	0	0
Public Administration and Safety	550	400	0	0	0	0
Education and Training	320	200	0	0	3,640	2,260
Health Care and Social Assistance	660	710	0	0	3,970	4,270
Arts and Recreation Services	300	0	0	0	0	0
Other Services	780	450	0	0	0	0
<b>Total</b>	<b>9,210</b>	<b>6,660</b>	<b>8,190</b>	<b>8,310</b>	<b>7,610</b>	<b>6,530</b>

Source: MacroPlan Dimasi

- The alternative scenario indicates **9,210 sq.m of commercial, 8,190 sq.m of industrial** and **7,610 sq.m of special uses** floorspace will be required by 2021.
- Over the ten years to 2031, an additional **6,660 sq.m of commercial, 8,310 sq.m of industrial** and **6,530 sq.m of special uses** floorspace is expected to materialise.

#### 6.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for the Lismore LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B3 Commercial Core 1.8-3.25: 1
- As such, an average applied FSR of 1.6:1 has been applied across all business zones, 0.6:1 for industrial uses and 0.8:1 for Special Use zoned land.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial, 2.8–3.7 hectares of industrial and 1.8–2.4 hectares of special uses** land will be required by 2031.

Table 6.19

Demand for Employment Land (2031) - Lismore LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	1.6 - 2.1	1.6	1.0 - 1.3
Industrial	1.7 - 2.2	0.6	2.8 - 3.7
Special Uses	1.4 - 1.9	0.8	1.8 - 2.4

Source: MacroPlan Dimasi

#### 6.6.5 Demand for Retail Floorspace

The potential drivers of future demand for retail floorspace in the Lismore LGA are summarised below:

- Population growth – which is expected to be moderate, growing at an average of 0.6% per annum to 2031 (a net increase of 13.2% or 5,850 people).

- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

### Quantification of demand

Table 6.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Lismore LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 6.20 shows the following:

- The residential population of the Lismore LGA generates approximately **92,500 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **24,809 sq.m** by 2031, an increase of about **21%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **4,749 sq.m**, and is expected to increase by about **1,000 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of 5.2 hectares, assuming an average floorspace ratio (FSR) of 0.5.



Table 6.20

Lismore LGA - retail expenditure (\$M) and floorspace demand (sq.m), 2014-2026\*

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	45,340	46,000	47,550	49,000	50,200	0.6%
Tourism equiv. pop	2,040	2,069	2,139	2,204	2,258	0.6%
<b>Retail exp. (\$M)</b>						
Food & liquor	252	259	279	302	325	1.5%
Food catering	66	68	75	82	89	1.8%
Apparel	48	49	52	55	57	1.0%
Household	96	97	102	108	113	1.0%
Leisure	27	28	29	31	33	1.3%
General	45	47	51	55	60	1.7%
Retail services	<u>15</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>1.3%</u>
<b>Total</b>	<b>548</b>	<b>564</b>	<b>605</b>	<b>650</b>	<b>695</b>	<b>1.4%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	27,949	28,784	31,050	33,556	36,063	1.5%
Food catering	10,986	11,371	12,419	13,588	14,785	1.8%
Apparel	8,806	8,979	9,448	9,960	10,442	1.0%
Household	31,835	32,462	34,157	36,009	37,751	1.0%
Leisure	4,496	4,608	4,909	5,240	5,562	1.3%
General	7,525	7,773	8,448	9,197	9,958	1.7%
Retail services	<u>2,473</u>	<u>2,534</u>	<u>2,700</u>	<u>2,882</u>	<u>3,059</u>	<u>1.3%</u>
<b>Total</b>	<b>92,494</b>	<b>95,056</b>	<b>102,003</b>	<b>109,682</b>	<b>117,303</b>	<b>1.6%</b>
<b>Floorspace per capita</b>	<b>2.04</b>	<b>2.07</b>	<b>2.15</b>	<b>2.24</b>	<b>2.34</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	2,040	2,069	2,139	2,204	2,258	0.6%
Floorspace per capita**	<u>1.84</u>	<u>1.86</u>	<u>1.93</u>	<u>2.01</u>	<u>2.10</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>3,745</b>	<b>3,849</b>	<b>4,130</b>	<b>4,441</b>	<b>4,749</b>	<b>1.4%</b>
<b>Total retail demand (sq.m)</b>	<b>96,239</b>	<b>98,905</b>	<b>106,133</b>	<b>114,123</b>	<b>122,052</b>	<b>1.4%</b>
<b>Demand growth (14-31)</b>					<b>25,813</b>	
<b>Estimated land take (ha)</b>					<b>5.2</b>	

\*Constant 2013/14 dollars &amp; including GST

\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.

Source: MarketInfo; MacroPlan Dimasi

## 6.6 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' assessment of employment land for the Lismore LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Lismore LGA.

Key findings pertaining to our gap assessment are presented in Table 6.21.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	247.2	73.7	1.4	75.1	6.4	68.7
Industrial	274.6	97.0	92.0	189.0	3.2	185.8
Special Uses	302.8	72.0	0.0	72.0	2.1	69.9

Source: MacroPlan Dimasi

- Overall, there is sufficient zoned employment land to accommodate the future employment needs of the Lismore LGA (out to 2031).
- It is estimated over the forecast period:
  - *Supply of business land will exceed demand by 68.7 hectares*
  - *Supply of industrial land will exceed demand by 185.8 hectares*
  - *Supply of special uses land will exceed demand by 69.9 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Lismore LGA.
- Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Lismore LGA i.e. compared to that suggested in this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns, centres (i.e. local and neighbourhood) and industrial locations represent a practical approach to delivering more 'employment' land in Lismore LGA.

## 6.8 Conclusions

### 6.8.1 Commercial, Industrial and Special Uses

Over the five years to 2011, the resident population of Lismore LGA increased by 1,010 persons. Equating to an average rate of 0.5% per annum, growth in the Lismore LGA was the ninth highest of all LGAs in the North Coast.

With the exception of the 50-64 and 65+ residents, all age cohorts incurred a contraction. This growth composition was influenced by net migration into Lismore LGA, which recorded a net loss in young working adults. Notably, in contrast to other LGAs in the North Coast, net migration from 35-49 year old was apparent in Lismore LGA over the five years to 2011. In all, migration into Lismore LGA totalled 834 persons over the five year period.

The LGA's workforce is characterised by high representation in Health Care and Social Assistance (15.2%) and Retail Trade (14.8%). These population-supported industries make up 30% of the Lismore's workforce. Other significant industries include Education and Training (also population driven) and Construction.

The Lismore Base Hospital, St Vincent's Private Hospital and Southern Cross University campus are all situated adjacent to the Lismore City Centre. This is reflected in high representation amongst Health Care and Social Assistance (21.6%) and Education and Training (12.7%) workers. Moreover, a permanent workforce and student base within the Lismore CBD means other industries such as Retail Trade are able to benefit (being the second largest employer in Lismore LGA).

Similar to other LGAs, an ageing population has triggered demand for health and services, resulting in the generation of 446 additional jobs in the Health Care and Social Assistance industry. With the rate of ageing set to gather momentum over the next decade, the need to expand on current service provision is instrumental to creating employment and preserving prosperity in the region. This is evidenced by the \$80 million redevelopment of the Lismore Base Hospital and refurbishment/upgrades of other health facilities e.g. the \$1.5 million Lismore Private Day Surgery refurbishment project.

Required population thresholds for a localised business community have been met by the Lismore LGA resident population. A wide spectrum of professional service businesses such as real estate agencies, law firms and accounting partnerships operate in the main centre. While not the fastest expanding industries, the industries collectively created 245 jobs over the five years to 2011.

Over the same period, jobs losses in traditional industries such as Agriculture, Forestry and Fishing and Manufacturing have been significant. Collectively, around 250 workers have been shed from these industries between 2006 and 2011.

The high Australian Dollar has made international travel more attractive relative to domestic alternatives. Popular tourist destinations along the North Coast (and in hinterland locations) have not been immune to this change in demand composition.

Notably, benefits associated with tourist expenditure support a wide range of industries (and therefore jobs). Weaker domestic travel volumes has been reflected in job reductions in Retail Trade (-297) in the Lismore LGA.

Key economic and demographic drivers which are expected to influence the Lismore LGA include:

- DPE projections suggest population growth will increase in the future (0.6% per annum).
- Ageing within the population to gather momentum.
- The Australian Dollar is expected to revert back to long term average levels.

These trends are implied in our employment projections:

- Ageing to support higher demand for health and social services – further expansion in the Health Care and Social Assistance workforce and demand for commercial and special use floorspace.
- A depreciating Australian dollar to support international student enrolments at the South Cross University – supporting jobs growth in Education and Training, Accommodation and Food Services and Retail Trade, and therefore commercial, industrial, special use and retail provision.
- A larger residential population is expected to support more residential building activity and greater consumption of local goods and services – evidenced by jobs growth in Education and Training, Professional, Scientific and Technical Services, Retail Trade and Construction and increased demand for commercial, special use and industrial premises.
- Our estimates of demand indicate an additional **15,870–21,180 sq.m of commercial, 25,813 sq.m of retail, 16,500–22,000 sq.m of industrial and 14,140-18,850 sq.m of special use** floorspace will be required by 2031.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial, 5.2 hectares of retail, 2.8–3.7 hectares of industrial and 1.8–2.4 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient zoned employment land to accommodate the future employment needs of the Lismore LGA (out to 2031).
- It is estimated:
  - *Supply of business land will exceed demand by 68.7 hectares*
  - *Supply of industrial land will exceed demand by 185.8 hectares*
  - *Supply of special uses land will exceed demand by 69.9 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and

the cost of delivering services may reduce the quantum of land available for future development in the Lismore LGA.

- Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Lismore LGA i.e. compared to figures in this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns, centres (i.e. local and neighbourhood) and industrial locations represent a practical approach to delivering more 'employment' land in Lismore LGA.

### 6.8.2 Retail

We make the following conclusions in relation to the retail market within the Lismore LGA:

- The Lismore Major Regional Centre, including Goonellabah (as part of the urban centre) accommodates virtually all of the business zoned land in the LGA. The existing retail hierarchy and range of retail formats is generally sufficient for servicing most of the convenience and higher order retail needs of the Lismore LGA population, in addition to those residents in Kyogle and Richmond Valley – with limited retail offers.
- Future population growth is expected to be moderate, averaging about 0.6% per annum over the period to 2031, an increase of 5,850 persons, or about 13.2% on current levels. The population of the LGA at 2031 (50,200) will not be sufficient to trigger thresholds for additional major tenants and enclosed shopping centre floorspace.
- Broadly, future population growth (including tourism growth) translates to retail floorspace demand growth equivalent to about 25,813 sq.m (a 27% uplift) by 2031, equivalent to about 5.2 ha of land demand.

- Existing retail demand is estimated at 96,200 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 3,970,349 sq.m. By 2031, estimated retail demand is estimated to be about 122,052 sq.m. However because the retail offer in Lismore is relatively large compared with Kyogle and Richmond Valley, we estimate a net inflow of about 10% into Lismore, resulting in net demand is about 105,900 sq.m, increasing to 134,257 sq.m by 2031.
- The existing network of business zoned land has been able to accommodate recent new convenience related retail development over the past 5 years, including the new Aldi supermarket in 2014 and the new Woolworths shopping centre at Goonellabah in 2012.
- Our preliminary analysis indicates that the existing business land stock should **be sufficient to support the future retail demand growth across the LGA.**
- The B2 zoned precinct around Wyrallah Road supports relatively low density commercial uses, and could be intensified in due course. Similarly, the City Centre provides a significant volume of B3 zoned land and with some parts of the City Centre under-utilised, accommodating low intensity development.
- We expect that existing enclosed shopping centre facilities might be refurbished, or expanded, in due course to meet future demand and these centres will tend to be able to expand within their existing land footprint, or through amalgamation and redevelopment of adjacent land parcels.
- Significantly, virtually undeveloped B4 and B6 zoned land is provided at South Lismore and East Lismore, which should be able to absorb future commercial/bulky goods and large format retail uses that would not be considered 'traditional retail.'
- There are **no regional shopping centres** within Lismore (i.e. department store based centres), and by 2031, the population will still not be sufficient to be realistically considered for regional scale facilities. This is not to say that new retail formats/concepts may not seek to enter the Lismore market in the

future, and the planning system should be flexible enough to allow such uses to be considered in the context of their net community benefits.

- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.



## Section 7: LGA Analysis – Kyogle

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land audit for the Kyogle LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Kyogle LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Kyogle LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment undertaken.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as considered feedback from the DP&E and Kyogle Council.

### 7.1 Key facts, findings and take-outs

#### 7.1.1 Population growth

- Over the five years to 2011, the resident population of Kyogle LGA increased by 46 persons.
- Moderate growth was recorded in the 50-64 and 65+ age cohorts. Conversely, traditional family age cohorts (0-19 and 35-54) incurred population reductions.

- Between 2006 and 2011, the Kyogle LGA experienced a loss in net migration totalling 127 persons, mainly to other LGAs in the North Coast. The net loss was most pronounced amongst 20-34 year olds.
- DPE projections suggest weak population growth will continue in Kyogle LGA – 0.1% per annum out to 2031. As a result, we expect labour shortages to become apparent over the next five years.

### 7.1.2 Employment trends

- As at 2011, the Kyogle LGA supported 2,548 jobs, representing 1.4% of total jobs in the North Coast.
- The four largest employing industries are Agriculture, Forestry and Fishing (21.0%), Education and Training (12.3%), Retail Trade (11.3%) and Health Care and Social Assistance (10.3%).
- It is estimated over one-third of working residents leave Kyogle LGA for work, as reflected in a low job containment rate (60.3%).
- Between 2006 and 2011, Kyogle LGA's workforce contracted by 71 jobs.
- **Employment in Manufacturing expanded by 63 jobs in the Kyogle LGA over the five years to 2011**, which is quite different to the broader North Coast experience. Approximately 158 jobs were shed from the region's largest employing industry (Agriculture, Forestry and Fishing).

### 7.1.3 Employment land

- In Kyogle LGA, there are 131 hectares of land zoned for urban employment purposes – comprising of 18% Business and 82% Industrial.
- Following 71 job losses over the 2006 and 2011 period, the Kyogle LGA workforce is expected to expand by an additional 135 jobs over the forecast period (i.e. 2011 to 2031). The Health Care and Social Assistance industry is expected to accommodate a large share of this growth.

- Our estimates of demand indicate **1,980–2,610 sq.m of commercial, 2,867 sq.m of retail, 6,500–8,680 sq.m of industrial** and **2,100–2,780 sq.m of special use** of floorspace will be required by 2031.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **0.2-0.3 hectares of commercial, 0.6 hectares of retail, 1.1-1.4 hectares of industrial** and **0.3 hectares of special use** land will be required by 2031.
- With the exception of the special use category, there is sufficient zoned employment land to accommodate the future employment needs of the Kyogle LGA (out to 2031).
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 10.7 hectares*
  - *Supply of industrial land will exceed demand by 175.9 hectares*
  - *Demand for special uses land will exceed supply by 0.3 hectares*
- Notably, excess demand for special use land (which is expected to be underscored by demand for health care services) could be accommodated through aged care provision. Moreover, it is believed some future demand for health service purposes could be accommodated within other zones i.e. business and residential.
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kyogle LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in the Kyogle LGA to accommodate anticipated growth.

## 7.2 Literature review

The Kyogle Strategy for Closer Rural Settlement and Urban Expansion 2005 (CRSUE), the Kyogle Local Growth Management Strategy 2010 (KLGMS), and the Kyogle Economic Development Policy 2011 (KEDP) are the guiding documents in relation to economic development for the Kyogle. The CRSUE was developed in 2005 by Council to identify land for future urban development and to recommend a strategy for release of the land. The LGMS was informed by the CRSUE and provides an insight into the land available for residential, commercial and industrial uses to ensure this supply can accommodate the growth expected to 2031. The KEDP is the first step towards preparing an economic development strategy to enable the implementation of critical steps to assist in sustainable economic development of Kyogle, this document takes into consideration the findings of the KLGMS and provides direction for economic development over the next four years.

The main points of the documentation are outlined below:

- The FNCRS designates the Kyogle Town as the primary centre in the LGA, supported by several small villages.
- The CRSUE found that commercial land in Kyogle is primarily in the CBD area and has the potential of further development in the future. There is still potential for future industrial development within existing industrial lands due to underutilisation of current stock.
- The LGMS states that there needs to be consolidation in existing commercial and industrial areas.
- The LGMS recognises there is an increasing trend to work from home which will continue to rise with the improvements of e-communication network.
- The commercial and retail sector will expand within the town of Kyogle through both expansion and redevelopment.
- According to the LGMS there is sufficient area of industrial land (75ha) for a range of industry types to establish up to and beyond the life of the strategy,

which can occur through infill and staged rezoning and development on sites adjoining existing areas.

- The KEDP realises that the close proximity to growth areas in SEQ can be advantageous, especially for Darling Downs products which can be value added then shipped to Queensland for sale and export.
- The economic development policy focuses on agriculture, in particular the retention and improvement of the industry.
- The plan aims to promote investment in retirement and aged care sectors to reflect the ageing population.

### 7.3 Socio-demographic trends

#### 7.3.1 Population change

- According to ABS ERP figures, the Kyogle LGA increased by 46 persons from 2006 – 2011. The population as at 2011 was 9,537 persons.

Table 7.1

Estimated Resident Population (persons) - Kyogle LGA

Year	Estimated Resident Population	Total Change (persons)
2001	9,739	
2006	9,491	-248
2011	9,537	46

Source: ABS

- Over this period, growth in specific age cohorts varied considerably.
- The number of persons aged 50-64 and 65+ in Kyogle increased moderately with 390 and 187 persons respectively, while there were net declines in the 0-19 and 35-54 (families) age cohorts - -287 and -300 persons respectively.

**Table 7.2**  
**Population By Age (persons) - Kyogle LGA**

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	2,726	2,439	-287	26%
20-34	1,124	1,180	56	12%
35-49	2,094	1,794	-300	19%
50-64	2,114	2,504	390	26%
65+	1,433	1,620	187	17%
<b>Total</b>	<b>9,491</b>	<b>9,537</b>	<b>46</b>	<b>100%</b>

*Source: ABS*

### 7.3.2 Migration movements

Inward and outward movements for the Kyogle LGA have been analysed, using 2006 and 2011 Census data.

- Over the five years to 2011, the Kyogle experienced a loss in net migration totalling 127 persons.
- Net movements elsewhere in the Far North Coast constituted the largest loss in net migration (256 persons).
- There was a net gain of 52 persons from Sydney and 93 persons who had previously lived overseas.
- By age, the net loss was greatest within the 20-34 age cohort with a loss of 136 persons, while there was growth of 57 and 62 persons for the 35-49 and 50-64 age cohorts respectively.
- The outflow of persons aged 20-34 suggests the industry composition of the Kyogle LGA is not consistent with the types of jobs pursued by young working adults.

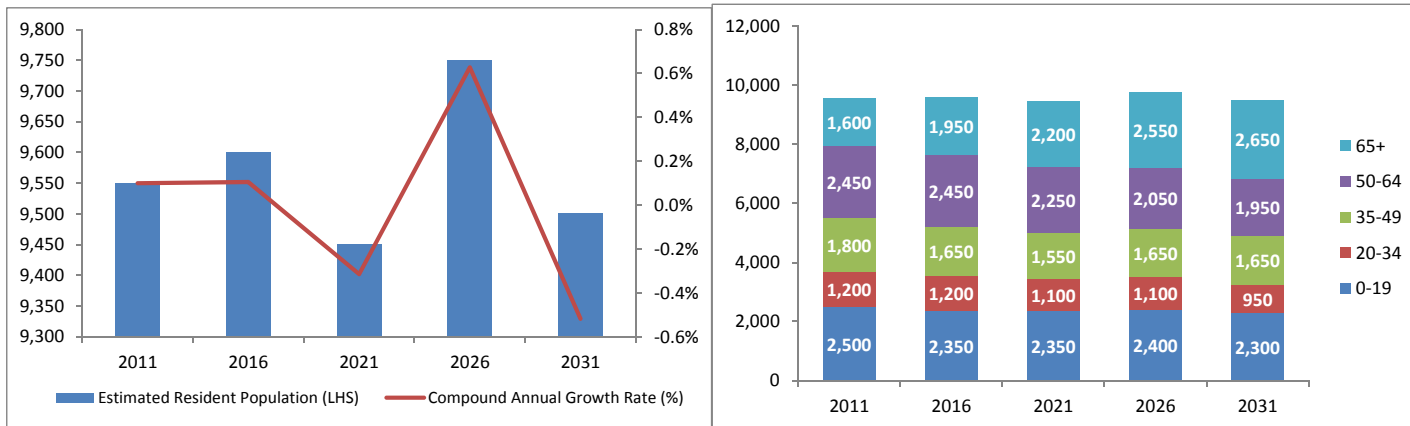
Table 7.3  
Net Migration by Age - Kyogle LGA

Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	-63	-59	-39	-39	-56	-256
Sydney	1	9	5	41	-4	52
Regional NSW	0	-3	14	-6	-3	2
Interstate	-39	-119	54	43	43	-18
Overseas	11	36	23	23	0	93
<b>Total Net Migration</b>	<b>-90</b>	<b>-136</b>	<b>57</b>	<b>62</b>	<b>-20</b>	<b>-127</b>

Source: ABS

### 7.3.3 Population projections

- According to projections provided by the DP&E, the Kyogle LGA population is projected to be 9,600 persons by 2031, suggesting a 63 person increase over the forecast period.
- Over the five year period to 2016, population is expected to increase at an average annual rate of 0.1%, and then will remain unchanged between 2021 and 2031.

**Figure 1. Projected Population and population by age (2011 to 2031)**

Source: DP&E, MacroPlan Dimasi

- Between 2011 and 2031, residents aged 65+ are projected to increase by 1,050 persons, notable the only age cohort earmarked to incur growth over the forecast period.
- The largest reduction is expected to occur in the 50-64 age cohort – contracting by 500 persons by 2031. This partly reflects ‘ageing in place’, as residents proceed to the 65+ cohort.
- A major challenge for the LGA will be to ensure that there is an adequate level of health and community service provision. This can be accompanied by retirement and aged care services and facilities. Part of the challenge will involve attracting young workers into the region (particularly as the rate of retirement increases), so that these services can be delivered.

#### 7.3.4 Labour force status

- Of all residents living in Kyogle LGA, around 81% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 53% i.e. 3,780 of 7,094 residents<sup>6</sup>.
- Of residents in labour force, 91% are employed and 9% unemployed (and are seeking working).

<sup>6</sup> ABS Census of Population and Housing (2011)



- Compared to the North Coast region, the employment rate in the Kyogle LGA was slightly lower (92% for the North Coast).

**Table 7.4**  
**Labour Force Status by Age (number) - Kyogle LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	205	25	230	367	597
20 - 29	377	70	447	207	654
30 - 39	483	60	543	257	800
40 - 49	838	67	905	289	1,194
50 - 59	997	80	1,077	552	1,629
60 - 69	406	49	455	740	1,195
70 - 79	95	0	95	546	641
80 - 84	17	3	20	187	207
85+	8	0	8	169	177
<b>Total</b>	<b>3,426</b>	<b>354</b>	<b>3,780</b>	<b>3,314</b>	<b>7,094</b>

*Source: Census of Population and Housing (2011)*

### 7.3.5 Job containment

- Job self-containment is defined as the percentage of working residents who are employed within the boundaries of the Kyogle LGA.
- Around 60.3% of Kyogle LGA's employed residents also worked in the LGA.
- The remaining 39% of working residents travel either to other North Coast LGAs (24.4%) or locations outside the North Coast (15.3%) for work.
- Of working residents who travel to other North Coast LGA, approximately 22.1% travelled to Lismore (11.3%) and Richmond Valley (10.8%) for work.

**Table 7.5**  
**Job Containment - Kyogle LGA**

	<b>Value</b>
Working residents	3,394
<u>Place of Work (number)</u>	
Kyogle	2,048
North Coast LGAs (ex. Kyogle)	828
Outside North Coast	518
<b>Total</b>	<b>3,394</b>
<u>Job Containment (%)</u>	
Kyogle	60.3%
North Coast LGAs	24.4%
Other	15.3%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The rate of job containment by industry classification for the Kyogle LGA is presented in the table below.
- Relative to the all industries average for Kyogle LGA (60.3%), nine industries achieved a higher rate of job containment.
- Agriculture, Forestry and Fishing (81.3%) and Electricity, Gas, Water and Waste Services (80%) achieved the highest rates of containment.
- Low job containment was observed in traditional industries such as Construction (52.7%) and Manufacturing (53.2%).

Table 7.6  
Job Containment by Industry - Kyogle LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Agriculture, Forestry and Fishing	81.3%	7.0%	11.8%	100.0%
Electricity, Gas, Water and Waste Services	80.0%	13.3%	6.7%	100.0%
Arts and Recreation Services	76.9%	10.3%	12.8%	100.0%
Retail Trade	69.7%	23.1%	7.2%	100.0%
Wholesale Trade	69.4%	23.1%	7.5%	100.0%
Professional, Scientific and Technical Services	67.6%	15.7%	16.7%	100.0%
Other Services	67.3%	22.4%	10.3%	100.0%
Rental, Hiring and Real Estate Services	64.5%	19.4%	16.1%	100.0%
Accommodation and Food Services	61.8%	25.7%	12.5%	100.0%
<b>Across all industries</b>	<b>60.3%</b>	<b>24.4%</b>	<b>15.3%</b>	<b>100.0%</b>
Financial and Insurance Services	57.1%	35.7%	7.1%	100.0%
Education and Training	57.1%	32.9%	9.9%	100.0%
Manufacturing	53.2%	32.4%	14.4%	100.0%
Construction	52.7%	10.1%	37.2%	100.0%
Public Administration and Safety	50.7%	32.2%	17.1%	100.0%
Transport, Postal and Warehousing	48.5%	26.1%	25.4%	100.0%
Information Media and Telecommunications	43.8%	56.3%	0.0%	100.0%
Health Care and Social Assistance	42.3%	44.4%	13.2%	100.0%
Administrative and Support Services	42.2%	26.6%	31.3%	100.0%
Mining	0.0%	0.0%	100.0%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

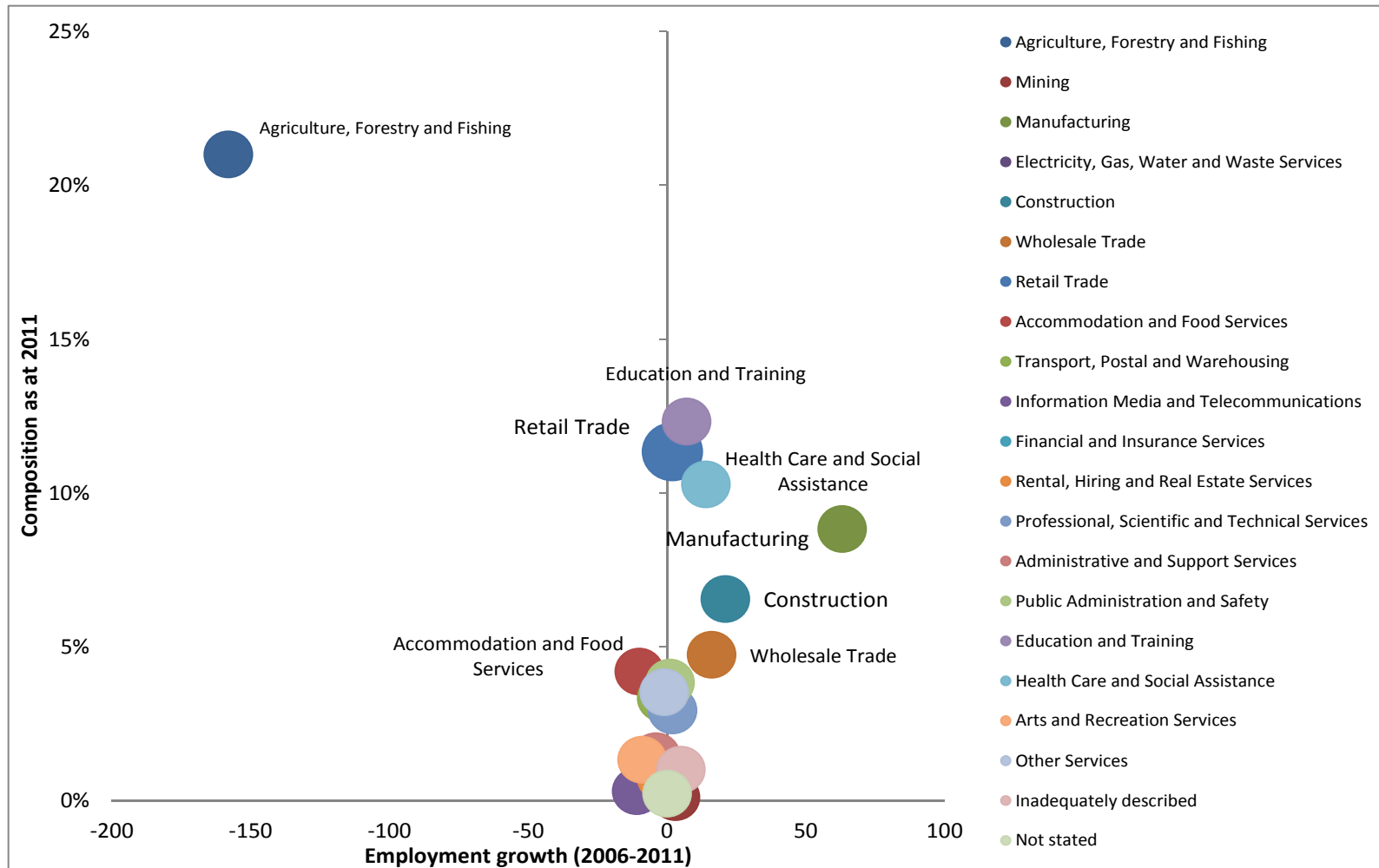
## 7.4 Employment and labour market trends

### 7.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Kyogle LGA and identify emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than 'working residents'. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Kyogle LGA supported 2,548 jobs, accounting for 1.4% of total jobs in the North Coast region.
- **The employment profile of the Kyogle LGA is very different from the broader region, with a pronounced skew towards the Agriculture, Forestry and Fishing industry, representing 21.0% of total jobs in comparison to the North Coast average of 4.7%.**

- The next largest employing industries in the Kyogle LGA were Education and Training (12.3%) Retail trade (11.3%) and Health Care and Social Assistance (10.3%).
- The profile of employment within white collar industries is below (13.4%) the North Coast average of 20.6%.
- On the other hand, representation within primary and traditional value-add industries such as Construction and Manufacturing is high, accounting for 36.4% of total jobs.
- Over the five years to 2011, the number of jobs within the Kyogle LGA contracted by 71.
- In contrast to all other North Coast LGAs, Manufacturing based employment increased in Kyogle LGA over the five year period (+63 jobs) – a result of the new milk manufacturing plant.
- While it is the largest employing industry in Kyogle LGA, 158 jobs were shed from the Agriculture, Forestry and Fishing industry over the five year period.
- The expected decline in the working age cohort to 2031 will limit workforce growth in the future. This is anticipated to occur during a period when demand for health and localised service provision is set to rise rapidly (due to an increase in 65+ persons).

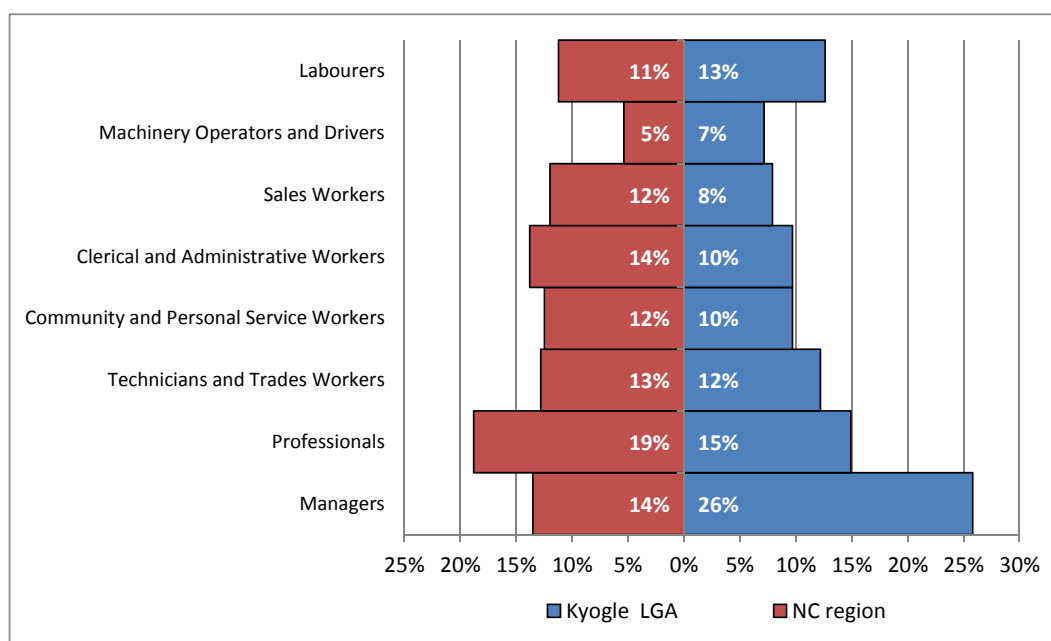
Figure 2. Employment composition and growth by industry, Kyogle LGA



### 7.4.2 Occupation profile

- As at Census 2011, approximately 26% of Kyogle LGA's workforce was employed within a 'Managerial' capacity, which is significantly above the North Coast average of 14%.
- The next two largest representative occupation types were Professionals (15%) and Labourers (13%).

**Figure 3. Occupation Composition (2011)**



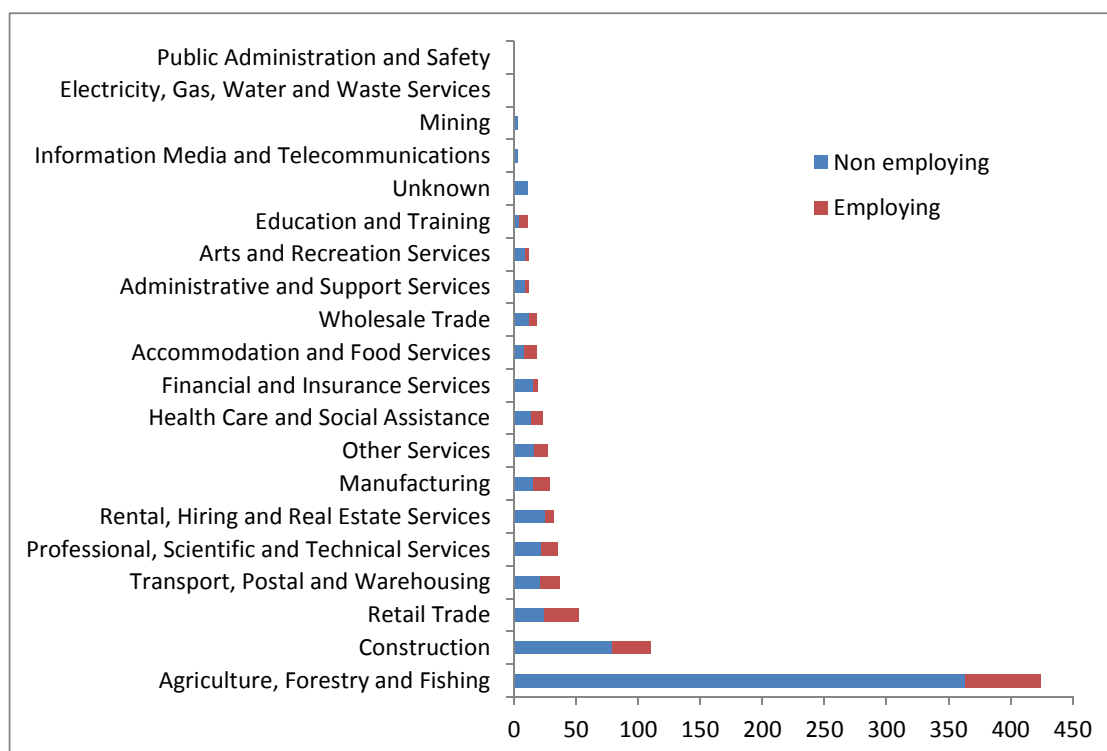
Source: ABS, MacroPlan Dimasi

### 7.4.3 Business composition & change

- As at June 2011, there were 876 businesses operating within the Kyogle LGA, with the majority (74%) being non employing/sole trading businesses.
- Similar to its employment profile and its skew to traditional labour intensive industries, businesses in the Agriculture, Forestry and Fishing industry account for the majority (424) of existing businesses. After this industry, business representation was greatest in Construction (110) and Retail Trade (52).

- **Of businesses that employ, Agriculture, Forestry and Fishing industry accounts for the largest number (46 businesses) – the majority of which employ between 1 and 4 workers.**
- There were no businesses employing 200 or more persons within the LGA, albeit there are nine that employ between 20 and 199 workers.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Between 2009 and 2011, approximately 16 new businesses were formed, with the majority occurring amongst non-employed businesses (which expanded by 14 businesses).
- By industry, Rental, Hiring and Real Estate Services and Professional, Scientific and Technical Services experienced the greatest growth in business numbers, with net additions of nine and six businesses respectively.
- On the other hand, the largest reduction in business count occurred within the Agriculture, Forestry and Fishing industry (-18 businesses).

Table 7.7  
Business Composition and Change - Kyogle LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	8	-6	2
Retail Trade	1	-10	-9
Accommodation and Food Services	-1	3	2
Education and Training	0	0	0
Construction	4	-2	2
Public Administration and Safety	-	-	0
Manufacturing	1	3	4
Professional, Scientific and Technical Services	9	-2	7
Other Services	-6	6	0
Transport, Postal and Warehousing	-5	0	-5
Agriculture, Forestry and Fishing	-16	-2	-18
Administrative and Support Services	0	0	0
Wholesale Trade	1	3	4
Rental, Hiring and Real Estate Services	3	6	9
Financial and Insurance Services	3	3	6
Arts and Recreation Services	-4	0	-4
Electricity, Gas, Water and Waste Services	-	-	0
Information Media and Telecommunications	0	0	0
Mining	6	0	6
Not Classified	10	0	10
<b>Total</b>	<b>14</b>	<b>2</b>	<b>16</b>

Source ABS

#### 7.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Population growth within the Kyogle LGA is expected to be low over the next 20 years. However, an ageing population with fewer younger people may present a challenge in the future.
- The current employment profile of the Kyogle LGA is skewed to Agriculture, Forestry and Fishing industry, accounting for 21% of total jobs. Given the LGA's reliance on this industry, we recommend encouraging a more diverse employment base for the LGA.
- The LGA's aged population is likely to generate additional demand for medical services in coming years, most of which could be accommodated by home care or retirement/aged care facilities.



## 7.5 Employment Land Supply

### 7.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Kyogle LGA. The information presented in this assessment is based on the Kyogle Local Environmental Plan 2012.
- There are two main employment land use categories which apply in the Kyogle LGA, including Business and Industrial.
- The table below presents urban employment land use zones in the Kyogle LGA, as well as the quantum of land assigned to each specific land use type.

**Table 7.8**  
Zoned Employment Land - Kyogle LGA

Classification	Land Use Zone	Area (ha)	%
Business	B2. Local Centre	10.9	8%
	B4. Mixed Use	13.3	10%
	<b>Total</b>	<b>24.3</b>	<b>18%</b>
Industrial	IN1. General Industrial	69.7	53%
	IN2. Light Industrial	37.9	29%
	<b>Total</b>	<b>107.6</b>	<b>82%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>131.9</b>	<b>100%</b>













Source: NSW Department of Planning and Environment (2014)

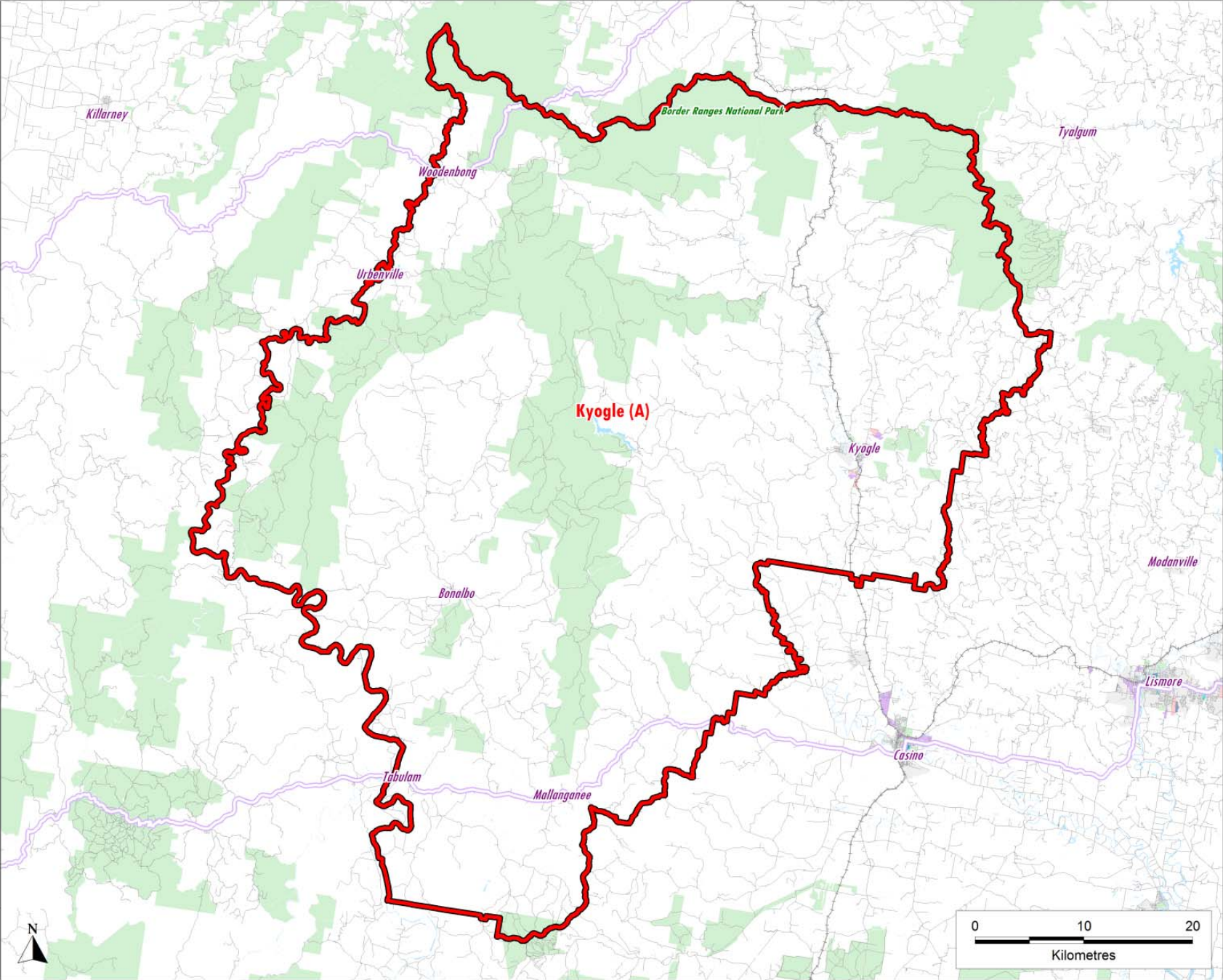
- In total, there are approximately 131.9 hectares of urban employment land in the LGA.
- Representing the largest allocation (82%), approximately 107.6 hectares of land is assigned to industrial uses i.e. IN1 General Industrial (69.7 hectares) and IN2 Light Industrial (37.9 hectares).
- There are 24.3 hectares of land zoned for business purposes, shared between B2 Local Centre (10.9 hectares) and B4 Mixed Use (13.3 hectares).

# Map 7.1

## Kyogle Shire Employment Land Zones

**Legend \***

-  Kyogle Shire Boundary
- Land Zones**
-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts















# Map 7.2

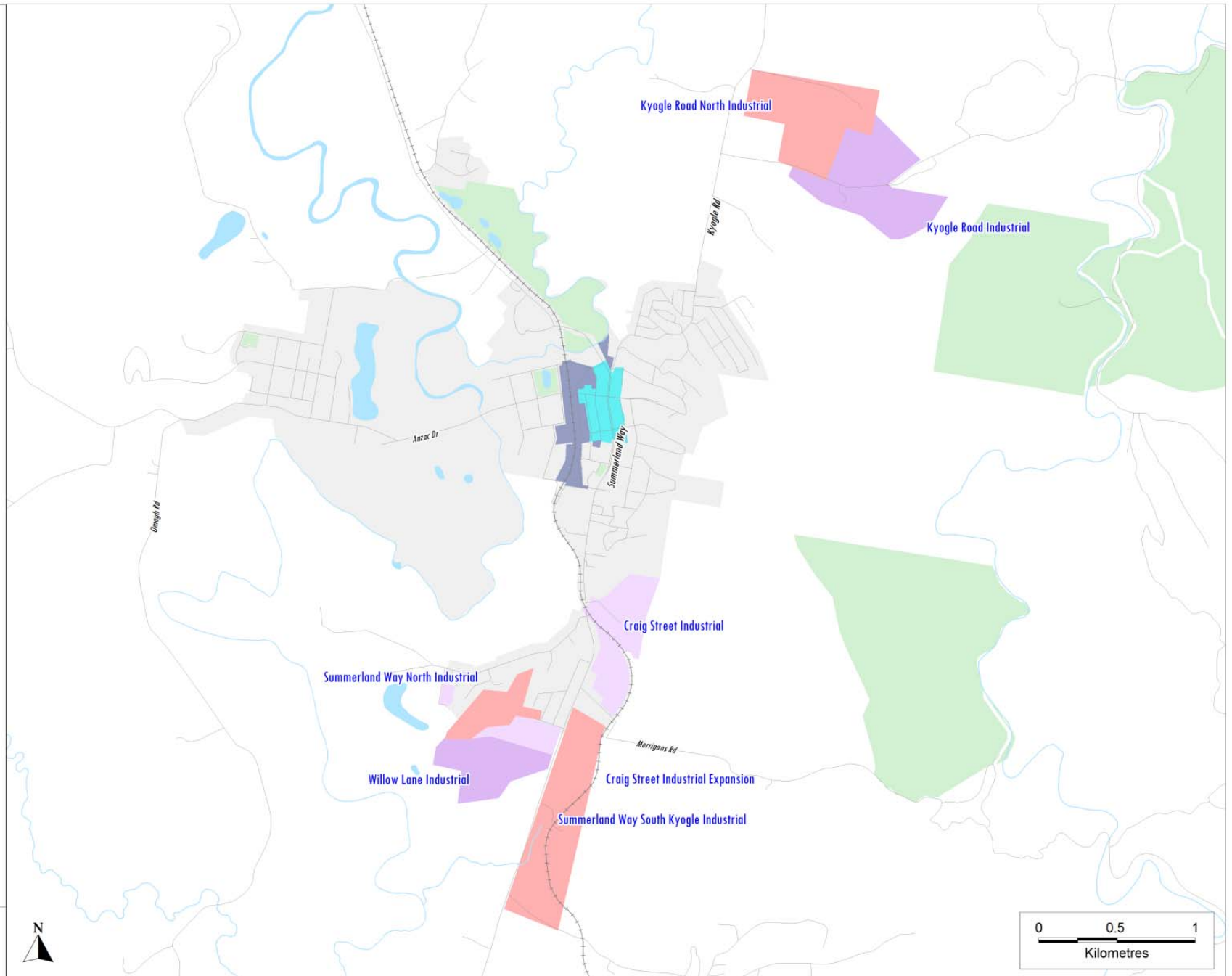
## Kyogle Shire Employment Land Zones

Legend \*

 Kyogle Shire Boundary

Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



### 7.5.2 Industrial – Existing supply

- Two industrial land use zones are used in the Kyogle LGA (i.e. IN1 General Industrial and IN2 Light Industrial), with IN1 accounting for 53% of the allocation.
- Three established industrial precincts have been identified in the Kyogle LGA (as presented in Table 7.9).

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
Kyogle Road Industrial Estate	46.0	8.2	18%
Craig Street Industrial Estate	32.0	12.2	38%
Willow Lane Industrial Precinct	29.6	5.0	17%
<b>Total</b>	<b>107.6</b>	<b>25.4</b>	<b>24%</b>

Source: MacroPlan Dimasi

Key findings pertinent to our examination of established industrial precincts include:

- In total, these three precincts entail over 107 hectares of zoned industrial land.
- The **Kyogle Road Industrial Estate** is located approximately 5km north east of Kyogle, and falls outside the perimeter of the town and its surrounds. Through Kyogle Road, the precinct has access to Summerland Way.
- The sole tenant at this precinct is Plywood Australia (manufacturer).
- The **Craig Street Industrial Estate** is located approximately 2km south of the Kyogle Central Business District, and is at the perimeter of the town. The precinct has access to Summerland way providing access to key trade regional locations along the Mid North and Far North Coast.

- Existing tenants at this precinct includes Grahams Concrete and other local orientated businesses such as Andersons Engineering and Glowtech Services.
- Of the total, it is estimated that around 25.4 hectares or 24% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 82.2 hectares of zoned industrial land capacity available for future development.
- At an average floor space ratio of 0.6:1, approximately 49.3 hectares of industrial floorspace could be delivered through existing zoned industrial land (assuming there are no constraints).

### 7.5.3 Industrial – Future Supply

- Four precincts/areas have been identified as future industrial use.
- The size and anticipated release times for these future precincts are presented in the table below.

<b>Precinct</b>	<b>Land Area</b> (Hectares)	<b>Timing</b> (Years)
Summerland Way South Kyogle	38.0	1 - 10
Kyogle Road Industrial Precinct	34.0	1 - 10
Craig Street Industrial Precinct	12.0	1 - 10
Summerland Way North Kyogle	11.0	10 - 20
<b>Total</b>	<b>95.0</b>	

*Source: MacroPlan Dimasi*

- Initially, delivery of additional Industrial land will most likely occur around existing precincts.
- Estimated to occur in the first half of the forecast period, the **Summerland Way (South Kyogle) Industrial Precinct** is the largest identified future industrial offering. It is an expansion of the existing precinct and is expected to accommodate an additional 38 hectares of industrial land.



#### 7.5.4 Retail & Commercial – Existing supply

The Kyogle LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 7.3 and Map 7.4.

- The Kyogle LGA centres hierarchy generally consists of the following structure:
  - Kyogle Town Centre
  - Small villages (such as Woodenbong, Bonalbo and Wangaree)
- There are no discount department stores (dds), or department stores, nor any major enclosed shopping centres in the Kyogle LGA. There is a larger provision of retail facilities in Casino and the closest higher order shopping facilities are located in Lismore.

#### **Kyogle Town Centre**

- The Kyogle Town Centre is the dominant retail destination within the LGA, occupying around 23.2 ha of business zoned land, including the 10.9 ha of B2 zoned land and 12.3 ha of B4 zoned land. The town centre is oriented along Summerland Way, the main thoroughfare through Kyogle.
- The town centre is estimated to contain approximately 8,000 - 10,000 sq.m of retail floorspace and about 5,000–6,000 sq.m of non-retail commercial/shopfront floorspace.
- The town centre includes an IGA supermarket anchored convenience centre at the northern end, and provides a range of cafes, restaurants, pubs, convenience retail – including retail services, non-food retail like pharmacies, hardware stores, discount variety stores and fashion and sporting goods retailers.
- In regards to non-retail uses, there are service stations, pubs, medical/health facilities, accountants, lawyers, banks, real estate agencies.

### **Other centres/villages**

There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:

- Bonalbo: Is a small village located in the west of the Kyogle LGA that includes a small Foodworks store.
- Woodenbong: Is a small village located in the north-west of the Kyogle LGA that provides around 800 - 1,000 sq.m of retail floorspace, including a small convenience store, pharmacy and hardware store.
- There is a limited provision of retail in the designated villages at Wangaree, Old Bonalbo, Tabulum and Mallanganee.












# Map 7.3

## Kyogle Shire Retail Provision

### Legend \*

 Kyogle Shire Boundary

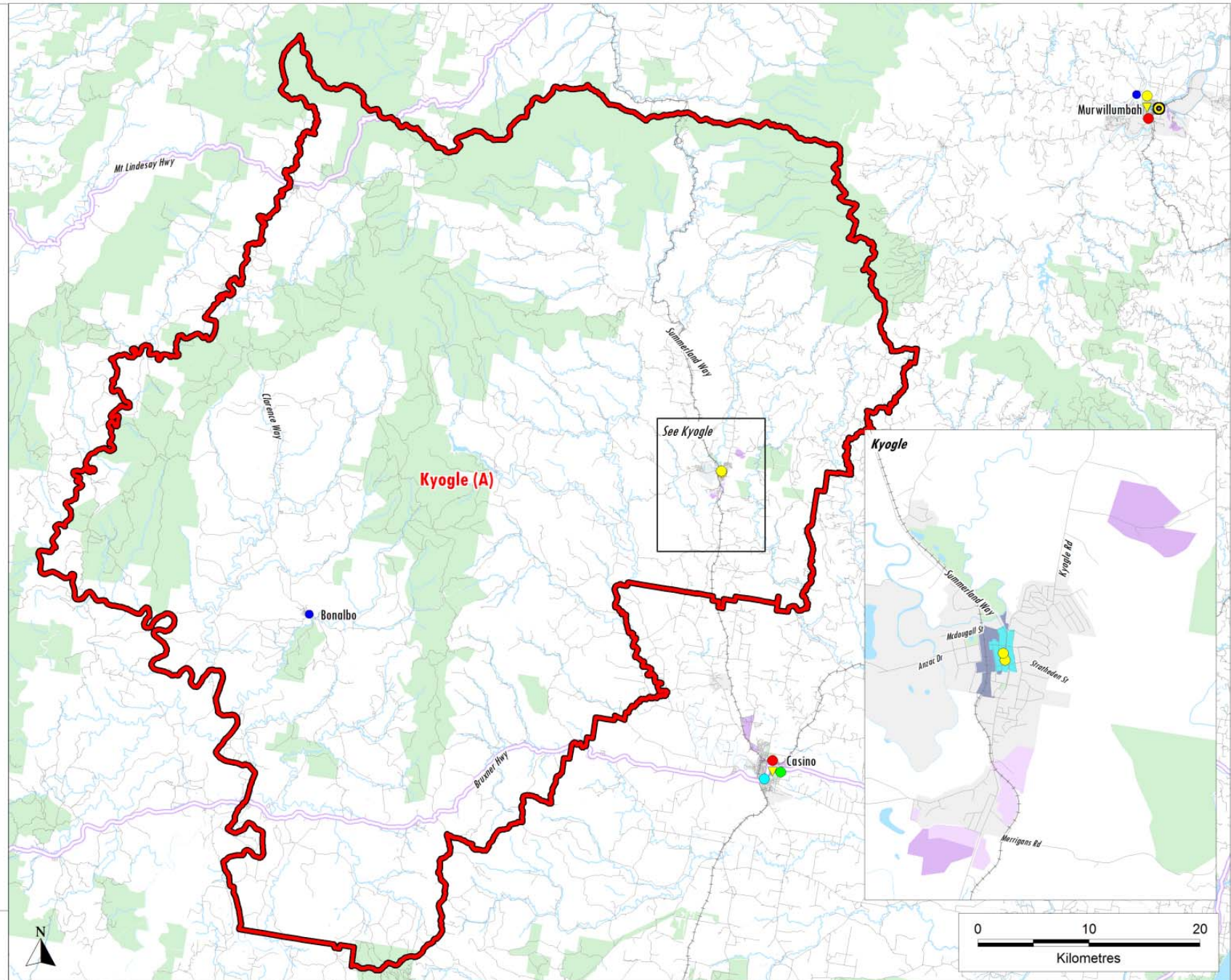
#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

#### Retail Competition

-  Target Country
-  Woolworths
-  Coles/Bi-Lo
-  Aldi
-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)

\* Hollow symbols indicate proposed stores





# Map 7.4

## Kyogle Shire Bulky / Homemaker Goods Retailing Legend \*

Kyogle Shire Boundary

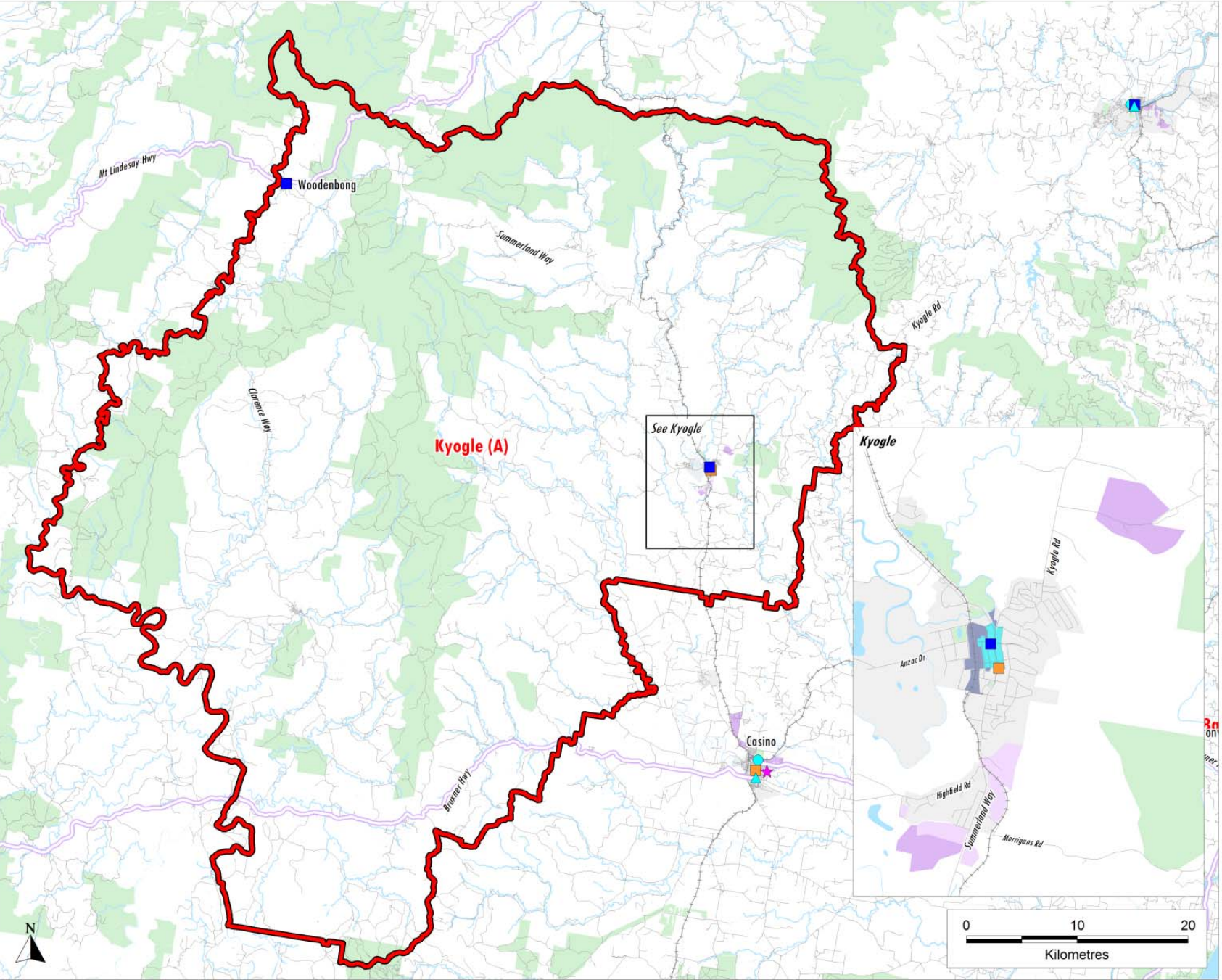
### Bulky Goods Retailers

- Home Hardware
- Mitre 10
- Repco
- Carpet Court
- Betta Home Living

### Land Zones

- |    |     |
|----|-----|
| B1 | B7  |
| B2 | IN1 |
| B3 | IN2 |
| B4 | IN3 |
| B5 | IN4 |
| B6 |     |

\* Hollow symbols indicate proposed stores



### **Business zoned land capacity for retail and commercial floorspace**

Table 7.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **24.3 hectares of business zoned land** within the Kyogle LGA, of which 10.9 ha is B2 zoned land and 13.4 ha of B4 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is no other business zoned land in the LGA.
- The Kyogle LEP 2012 does not specify FSRs. We have therefore applied estimated FSRs for each business zone type based of the average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Kyogle LGA to be in the order of 242,874 sq.m.
- We estimate that there is net leakage from the LGA in the order of 40%, given the relative lack of higher order, and indeed even supermarket facilities, compared with nearby Casino and Lismore. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an understanding of the suitability of the zoned business land stock to meet future demand.

**Table 7.11**  
Kyogle LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B2*	10.9	1.0	109,482
Total B4*	<u>13.3</u>	1.0	<u>133,392</u>
<b>Total LGA</b>	<b>24.3</b>		<b>242,874</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

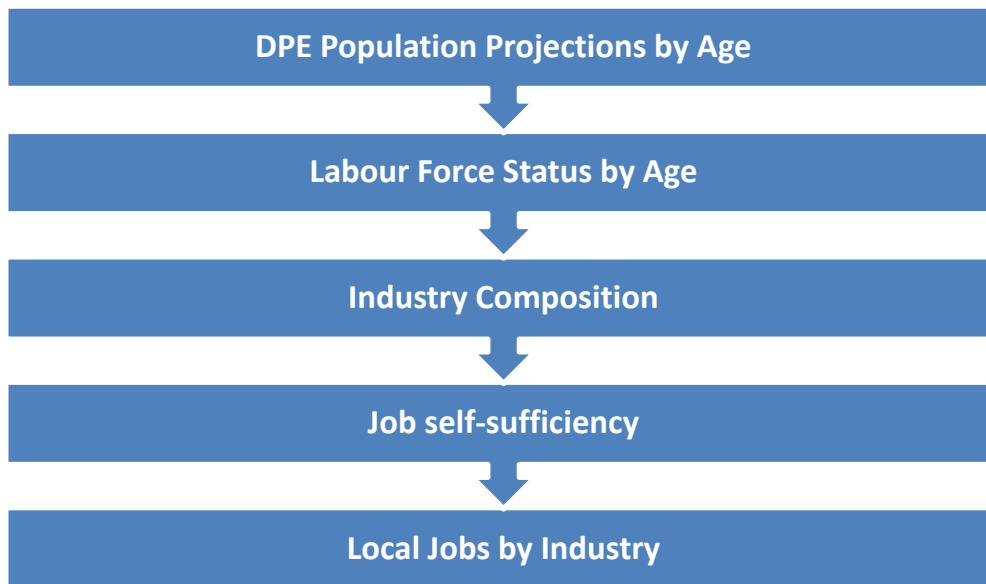
### 7.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within the Kyogle LGA.

## 7.6 Demand for employment land

### 7.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in the Kyogle LGA, we first generate employment projections for the LGA.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Kyogle LGA to generate employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Kyogle LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 7.6.2 Employment Projections

- Following 71 job losses over the 2006 and 2011 period, the Kyogle LGA workforce is expected to expand by an additional 135 jobs over the forecast period (i.e. 2011 to 2031).
- According to our projections, employment is expected to rise by 41 jobs over the decade to 2021. As at 2021, the Kyogle LGA is projected to entail 2,589 jobs.
- By 2031, employment in the LGA is expected to increase to 2,683, representing 94 job additions over the 2021 and 2031 period.

- At an average increase of 7 jobs per annum, this projected rate of employment is above that observed between 2006 and 2011 (average of -14 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+30), Education and Training (+29) and Retail Trade (+17). Notably, new employment is also expected in the manufacturing industry (+6).
- Outright job reductions are predicted for four industries – albeit minor in number.
- Notably, employment in 17 industries is expected to change by 20 or less jobs over the forecast period.

**Table 7.12**  
Employment by Industry - Kyogle LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	262	280	292	30
Education and Training	314	324	343	29
Retail Trade	289	298	306	17
Construction	167	171	182	15
Accommodation and Food Services	107	114	121	14
Transport, Postal and Warehousing	85	94	97	12
Professional, Scientific and Technical Services	75	80	86	11
Electricity, Gas, Water and Waste Services	25	28	35	10
Wholesale Trade	121	124	129	8
Rental, Hiring and Real Estate Services	19	19	27	8
Manufacturing	225	228	231	6
Financial and Insurance Services	22	26	27	5
Mining	3	3	6	3
Administrative and Support Services	37	38	39	2
Public Administration and Safety	98	96	99	1
Arts and Recreation Services	34	35	31	-3
Information Media and Telecommunications	8	5	5	-3
Agriculture, Forestry and Fishing	535	529	531	-4
Other Services	90	88	86	-4
Other*	32	10	11	-21
<b>Total jobs</b>	<b>2,548</b>	<b>2,589</b>	<b>2,683</b>	<b>135</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry. The following table presents the concordance used to transpose ABS ANSZIC employment industry figures into specific land use types.

Table 7.13  
Industry and Land Use Conversion Matrix - Kyogle LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

Table 7.14  
Employment Additions by Land Use Type - Kyogle LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	0	0	0
Manufacturing	0	0	3	3	0	0
Electricity, Gas, Water and Waste Services	0	1	3	6	0	0
Construction	0	1	4	10	0	0
Wholesale Trade	3	4	1	1	0	0
Retail Trade	8	8	0	0	0	0
Accommodation and Food Services	5	5	2	2	0	0
Transport, Postal and Warehousing	2	1	7	2	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	4	1	0	0	0	0
Rental, Hiring and Real Estate Services	0	8	0	0	0	0
Professional, Scientific and Technical Services	5	6	0	0	0	0
Administrative and Support Services	1	1	0	0	0	0
Public Administration and Safety	0	4	0	0	0	0
Education and Training	1	2	0	0	9	18
Health Care and Social Assistance	4	3	0	0	14	10
Arts and Recreation Services	1	0	0	0	0	0
Other Services	0	0	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi



### 7.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and demand for new floorspace.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Kyogle LGA (presented in Table 7.15).

**Table 7.15**

**Indicative Employment Density by Industry and Land Use Type - Kyogle LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative

employment density for that particular industry). Results for this scenario are presented in Table 7.16.

**Table 7.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Kyogle LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	60	0	0
Manufacturing	0	0	720	710	0	0
Electricity, Gas, Water and Waste Services	10	30	760	1,440	0	0
Construction	10	30	530	1,560	0	0
Wholesale Trade	80	110	130	180	0	0
Retail Trade	330	310	60	60	0	0
Accommodation and Food Services	240	240	310	310	0	0
Transport, Postal and Warehousing	50	20	1,370	480	0	0
Information Media and Telecommunications	0	10	0	0	0	0
Financial and Insurance Services	100	20	0	0	0	0
Rental, Hiring and Real Estate Services	0	190	0	0	0	0
Professional, Scientific and Technical Services	130	140	0	0	0	0
Administrative and Support Services	20	30	0	0	0	0
Public Administration and Safety	0	90	0	0	0	0
Education and Training	40	80	0	0	430	890
Health Care and Social Assistance	140	100	0	0	850	610
Arts and Recreation Services	60	0	0	0	0	0
Other Services	0	0	0	0	0	0
<b>Total</b>	<b>1,210</b>	<b>1,400</b>	<b>3,880</b>	<b>4,800</b>	<b>1,280</b>	<b>1,500</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated approximately **1,210 sq.m of commercial, 3,880 sq.m of industrial and 1,280 sq.m of special use** of floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **1,400 sq.m of commercial, 4,800 sq.m of industrial and 1,500 sq.m of special uses** of floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation in which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 7.17.



- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 7.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Kyogle LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	40	0	0
Manufacturing	0	0	540	540	0	0
Electricity, Gas, Water and Waste Services	10	20	570	1,080	0	0
Construction	10	30	390	1,170	0	0
Wholesale Trade	60	80	100	130	0	0
Retail Trade	250	230	50	40	0	0
Accommodation and Food Services	180	180	230	230	0	0
Transport, Postal and Warehousing	40	10	1,030	360	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	70	20	0	0	0	0
Rental, Hiring and Real Estate Services	0	140	0	0	0	0
Professional, Scientific and Technical Services	100	110	0	0	0	0
Administrative and Support Services	20	30	0	0	0	0
Public Administration and Safety	0	70	0	0	0	0
Education and Training	30	60	0	0	330	670
Health Care and Social Assistance	110	80	0	0	640	460
Arts and Recreation Services	40	0	0	0	0	0
Other Services	0	0	0	0	0	0
<b>Total</b>	<b>920</b>	<b>1,060</b>	<b>2,910</b>	<b>3,590</b>	<b>970</b>	<b>1,130</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicates **920 sq.m of commercial, 2,910 sq.m of industrial** and **970 sq.m of special use** of floorspace will be required by 2021.
- Under the Alternative scenario, demand is anticipated to rise relative to the prior ten year period. Over the ten years to 2031, an additional **1,060 sq.m of commercial, 3,590 sq.m of industrial** and **1,130 sq.m of special uses** of floorspace is expected to materialise.

#### 7.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- DP&E issued layers indicate there are no floorspace ratios in the Kyogle LGA. As such, average floorspace ratios applied across the North Coast region have been utilised i.e. 1:1 for business, 0.6:1 for industrial and 0.8:1 for Special Uses.
- Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **0.2-0.3 hectares of commercial**, **1.1-1.4 hectares of industrial** and between **0.3 hectares of special uses** land will be required by 2031.

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	0.2 - 0.3	1.0	0.2 - 0.3
Industrial	0.7 - 0.9	0.6	1.1 - 1.4
Special Uses	0.2 - 0.3	0.8	0.3

Source: MacroPlan Dimasi

#### 7.6.5 Demand for retail floorspace

The potential drivers of future demand for retail floorspace in the Kyogle LGA are summarised below:

- Population growth – which is expected to be flat.
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian

dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### **Quantification of demand**

Table 7.19 outlines the retail floorspace expenditure and equivalent retail floorspace demand generated by the population within the Kyogle LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014, and shows the following:

- The residential population of the Kyogle LGA generates approximately **18,700 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **2,867sq.m** by 2031, an increase of about **15%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **769 sq.m**, and is expected to increase by about **100 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **0.6 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

Table 7.19

Kyogle LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	9,580	9,600	9,600	9,600	9,600	0.0%
Tourism equiv. pop	381	381	381	381	382	0.0%
<b>Retail exp. (\$M)</b>						
Food & liquor	53	54	56	59	62	0.9%
Food catering	12	13	13	14	15	1.2%
Apparel	9	9	9	9	9	0.4%
Household	19	20	20	20	21	0.4%
Leisure	5	5	5	6	6	0.7%
General	10	10	10	11	12	1.1%
Retail services	<u>3</u>	<u>3</u>	<u>3</u>	<u>3</u>	<u>3</u>	<u>0.7%</u>
<b>Total</b>	<b>111</b>	<b>113</b>	<b>117</b>	<b>122</b>	<b>127</b>	<b>0.8%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	6,000	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	5,889	5,990	6,252	6,555	6,873	0.9%
Food catering	2,042	2,087	2,206	2,341	2,485	1.2%
Apparel	1,568	1,580	1,608	1,645	1,682	0.4%
Household	6,476	6,522	6,640	6,791	6,945	0.4%
Leisure	873	884	911	944	977	0.7%
General	1,623	1,656	1,741	1,839	1,943	1.1%
Retail services	<u>463</u>	<u>469</u>	<u>483</u>	<u>501</u>	<u>518</u>	<u>0.7%</u>
<b>Total</b>	<b>18,734</b>	<b>19,017</b>	<b>19,750</b>	<b>20,606</b>	<b>21,502</b>	<b>1.1%</b>
Floorspace per capita	1.96	1.98	2.06	2.15	2.24	0.8%
<b>Tourism demand</b>						
Equiv. tourism pop.	381	381	381	381	382	0.0%
Floorspace per capita**	<u>1.76</u>	<u>1.78</u>	<u>1.85</u>	<u>1.93</u>	<u>2.02</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>670</b>	<b>679</b>	<b>706</b>	<b>737</b>	<b>769</b>	<b>0.8%</b>
<b>Total retail demand (sq.m)</b>	<b>19,404</b>	<b>19,696</b>	<b>20,456</b>	<b>21,343</b>	<b>22,272</b>	<b>0.8%</b>
<b>Demand growth (14-31)</b>					<b>2,867</b>	
<b>Estimated land take (ha)</b>					<b>0.6</b>	

\*Constant 2013/14 dollars &amp; including GST

\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.

Source: MarketInfo; MacroPlan Dimasi

## 7.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' assessment of employment land for the Kyogle LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Kyogle LGA.

Key findings pertaining to the gap assessment are presented in Table 7.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	24.3	11.5	0.0	11.5	0.8	10.7
Industrial	107.6	82.2	95.0	177.2	1.3	175.9
Special Uses	0.0	0.0	0.0	0.0	0.3	-0.3

Source: MacroPlan Dimasi

- With the exception of the special use category, there is sufficient zoned employment land to accommodate the future employment needs of the Kyogle LGA (out to 2031).
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 10.7 hectares*
  - *Supply of industrial land will exceed demand by 175.9 hectares*
  - *Demand for special uses land will exceed supply by 0.3 hectares*
- Notably, excess demand for special use land (which is expected to be underscored by demand for health care services) could be accommodated through retirement and aged care provision. Moreover, it is believed some future demand for health service purposes could be accommodated by other zones i.e. business and residential.
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kyogle LGA.

- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Kyogle LGA, particularly for emerging businesses and industries.

## 7.8 Conclusion

### 7.8.1 Commercial, Industrial and Special Uses

Population growth in the Kyogle LGA has been negligible, with the number of residents increasing by just 46 persons over the five years to 2011. During this period, most age cohorts experienced a decline, with the exception of 50+ residents.

The retention of young workers is an issue. Faced with limited employment diversity and prospects, young working adults have left Kyogle LGA in search of jobs in other major regional centres. This is evident in ABS migration figures, with Kyogle LGA experiencing a loss in net migration totalling 127 persons.

Kyogle LGA's industry composition is unique. Agriculture, Forestry and Fishing is the dominant employing industry, supporting 21.0% of the local workforce. Specific agricultural activities include beef cattle farming, dairy farming (and production of milk powder) and nursery production. The next three largest employing industries are population driven i.e. Education and Training (12.3%), Retail Trade (11.3%) and Health Care and Social Assistance (10.3%).

Employment in Manufacturing expanded by 63 jobs in the Kyogle LGA over the five years to 2011. Approximately 158 jobs were shed from the region's largest employing industry i.e. Agriculture, Forestry and Fishing.

Key economic and demographic drivers and associated outcomes for the Kyogle LGA include:

- DPE projections suggest weak population growth will continue – 0.1% per annum out to 2031. With the outflow of working age residents expected to persist in the future, we expect labour shortages to become apparent over the next five years.
- Ageing to gather momentum in Kyogle LGA, placing pressure on existing health and social care services.
- Sustained competition from international manufacturers is expected to limit growth within this industry.

Overall, the Kyogle LGA workforce is expected to contract over the forecast period. As a result, the need for more commercial, retail, industrial and special use floorspace will be limited.

Our estimates of demand indicate **1,980–2,610 sq.m of commercial, 2,867 sq.m of retail, 6,500–8,680 sq.m of industrial** and **2,100–2,780 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **0.2-0.3 hectares of commercial, 0.6 hectares of retail, 1.1-1.4 hectares of industrial** and **0.3 hectares of special use** land will be required by 2031.

With the exception of the special use category, there is sufficient zoned employment land to accommodate the future employment needs of the Kyogle LGA (out to 2031). It is estimated:

- *Supply of business land will exceed demand by 10.7 hectares*
- *Supply of industrial land will exceed demand by 175.9 hectares*
- *Demand for special uses land will exceed supply by 0.3 hectares*

Notably, excess demand for special use land (which is expected to be underscored by demand for health care services) could be accommodated through aged care provision. Moreover, it is believed some future demand for health service purposes could be accommodated within business zoned land.

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kyogle LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Kyogle LGA, particularly for emerging businesses and industries.

### **7.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Kyogle LGA:

- Kyogle LGA has a small population with low tourist visitor numbers. Future growth in the residential population is expected to be flat, with retail floorspace demand estimated to grow by just 2,867 sq.m by 2031, equating to a land requirement of 0.6 hectares.
- Existing retail demand is estimated at 19,400 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 242,874 sq.m. However because the retail offer in Kyogle is limited, we estimate leakage of about 40% beyond the LGA to centres such as Casino and Lismore, meaning net demand is about 11,600 sq.m, increasing to 13,363 sq.m by 2031.
- The population of the LGA is too small and dispersed to trigger thresholds for additional major tenants or enclosed shopping centre floorspace.
- There is significant escape expenditure to surrounding higher order retail facilities provided in Casino, Lismore and Ballina. This would include expenditure on fashion, leisure, dds and household goods/bulky goods retailing. For residents in the far north west of the LGA, Beaudesert offers a convenient and broad retail offer across the border in Queensland.



- While the LGA does not support a full range of retail formats and centre types, the community appears to be sufficiently serviced for convenience retail related items, although there will be leakage to other regions for supermarket shopping as well, given the greater range and depth on offer in Casino and Lismore.
- Our preliminary analysis indicates that the existing land stock will **be sufficient to support the future retail demand growth across the LGA.**
- We recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 8: LGA Analysis – Richmond Valley

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land audit on the Richmond Valley LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Richmond Valley LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Richmond Valley LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from the DP&E and Richmond Valley Council.

### 8.1 Key facts, findings and take-outs

#### 8.1.1 Population growth

- Between 2006 and 2011, the resident population of Richmond Valley LGA increased by 989 persons – at an average rate of 0.9% per annum.

- Notably, there was modest growth of 153 persons in the 20-34 age cohort, while the 50-64 and 65+ age cohorts expanded by 564 and 573 persons respectively.
- Over the five years to 2011, net migration into the Richmond Valley LGA totalled 288 persons, mostly coming from other North Coast LGAs and regional NSW.
- DPE projections suggest the rate of population growth will ease in Richmond Valley LGA; 0.7% per annum during 2011-2016, 0.6% per annum during 2016-2021, 0.5% during 2021-2026 and 0.4% per annum during 2026-2031. With the exception of the 65+ persons, all age cohorts are expected to incur reductions.

### **8.1.2 Employment trends**

- As at 2011, the Richmond Valley LGA supported 6,151 jobs, accounting for 3.4% of total jobs in the North Coast.
- The largest employing industry is Manufacturing (19.2%) – significantly above the North Coast average of 6.8% for this industry.
- Less than 60% of Richmond Valley's working residents also work in the LGA.
- Between 2006 and 2011, the Richmond Valley LGA's workforce contracted by 116 jobs.
- In contrast to all other North Coast LGAs, employment in Manufacturing and Administration and Support Service expanded by 108 jobs (collectively) over the five years to 2011. Notably, approximately 115 jobs were shed from Agriculture, Forestry and Fishing during this period.

### **8.1.3 Employment Land**

- In Richmond Valley LGA, there are 403.9 hectares of land zoned for urban employment purposes – comprising of 11% Business, 82% Industrial and 7% Special Uses.

- In contrast to the 2006 and 2011 period (-116 jobs), employment in the Richmond Valley LGA is projected to increase over the forecast period. Over the twenty years to 2031, it is expected the workforce will expand by 458 jobs.
- Our estimates of future demand indicate an additional **8,800–11,710 sq.m of commercial**, **11,126 sq.m of retail**, **17,540–23,380 sq.m of industrial** and **7,400–9,870 sq.m of special use** of floorspace will be required by 2031.
- Having regard for derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **0.9–1.2 hectares of commercial**, **2.2 hectares of retail**, **2.9–3.9 hectares of industrial** and **0.9–1.2 hectares of special uses** land will be required by 2031.
- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Richmond Valley LGA (out to 2031).
- Notably, the stock of zoned business and special use zoned land will almost be fully exhausted by 2031. It is estimated:
  - *Supply of business land will exceed demand by 1.1 hectares*
  - *Supply of industrial land will exceed demand by 179.6 hectares*
  - *Supply of special uses land will exceed demand by 1.9 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Richmond Valley LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market needs, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Richmond Valley LGA, particularly to foster emerging business needs.

- It is recognised that the Richmond Valley LGA will need to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 1.1 hectares and 1.9 hectares respectively available for development as at 2031).
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Richmond Valley LGA. It is believed some future demand for health service purposes could be accommodated within business zoned land.

## 8.2 Literature review

The Richmond Valley Economic Development Strategy 2010-2015 (EDS), the Urban Land Release Strategy -Town of Evans Head 2007 (ULRSEH) and the Casino Urban Land Release Strategy 2005 (CULRS) provide relevant insight. The EDS prepared by Council to assist with decision making relating to economic development initiatives. The Urban Land Release Strategies for Casino and Evans Head aim to allow for sustainable planned growth in these areas to 2025.

From these documents the following key points have been noted:

- Richmond Valley is the gateway to the Northern Rivers Region and is a leader in primary industries and food manufacturing as seen through the location of the Sugar Mill at Broadwater, Richmond Dairies and the Northern Rivers Co-Operative Meat Company at Casino.
- The strategy focuses on the opportunities of the region for gas and manufacturing, rail and the possibility of locating a rail freight intermodal, enhancing the established manufacturing base and potential to attract further investment in key industries.
- The CBD redevelopment improves opportunities for retail industry and tourism product development.
- The EDS outlines the size, flexibility and availability of industrial land attracts investment and it presents the opportunity to initiate the industry development

and cluster program whereby industry can cluster and share resources and infrastructure.

- The Casino Urban Land Release Strategy (2005) identifies Casino as the beef capital of NSW with its substantial saleyard complex, meat processing plant and grazing area. However, there has been an economic downturn in primary industries.
- Upgrades to Summerland Way and Bruxner Highway are required to facilitate appropriate growth.
- Within Casino there is land available for future industrial expansion beyond 2020.
- The CULRS states there is sufficient land available for development and expansion of commercial uses in Casino through amalgamation and redevelopment of existing commercial land.
- The URLSEH identifies Oxleyan Pygmy Perch habitat, flooding, bushfire, ecology and the National Park as major constraints to growth.
- Tourism and related industries are the focus for growth in Evans Head, while isolation and lack of key infrastructure are current issues.
- Evans Head Memorial aerodrome will be the key site for growth in industrial related land.

### **8.3 Socio-demographic trends**

#### **8.3.1 Population change**

- According to ABS ERP figures, the Richmond Valley LGA had a total population of 22,717 persons in 2011 – showing growth of 989 persons over the five years to 2011, equating to an annual growth rate of 0.9% or an average annual increase of 198 persons.

Table 8.1

## Estimated Resident Population (persons) - Richmond Valley LGA

Year	Estimated Resident Population	Total Change (persons)
2001	21,014	
2006	21,728	714
2011	22,717	989

Source: ABS

- The largest reductions in the resident population were observed in key 'family' aged cohorts – persons aged 0-19 and 35-54 declined by 44 and 257 persons respectively.
- In contrast, there was modest growth of 153 persons in the 20-34 age cohort, while the 50-64 and 65+ age cohorts grew significantly, increasing by 564 and 573 additional persons respectively.

Table 8.2

## Population By Age (persons) - Richmond Valley LGA

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	6,295	6,251	-44	28%
20-34	3,111	3,264	153	14%
35-49	4,361	4,104	-257	18%
50-64	4,173	4,737	564	21%
65+	3,788	4,361	573	19%
<b>Total</b>	<b>21,728</b>	<b>22,717</b>	<b>989</b>	<b>100%</b>

Source: ABS

### 8.3.2 Migration movements

Inward and outward movements for the Richmond Valley LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).

- Over the five years to 2011, net migration into the Richmond Valley LGA totalled 288 persons.
- Movements from other North Coast LGAs and regional NSW provided the largest source of net migration gain at 237 and 164 persons respectively.
- Persons aged 20-34 incurred the largest loss in net migration (-186 persons) while persons aged 50-64 accounted for the largest gain in net migration.

**Table 8.3**  
Net Migration by Age - Richmond Valley LGA

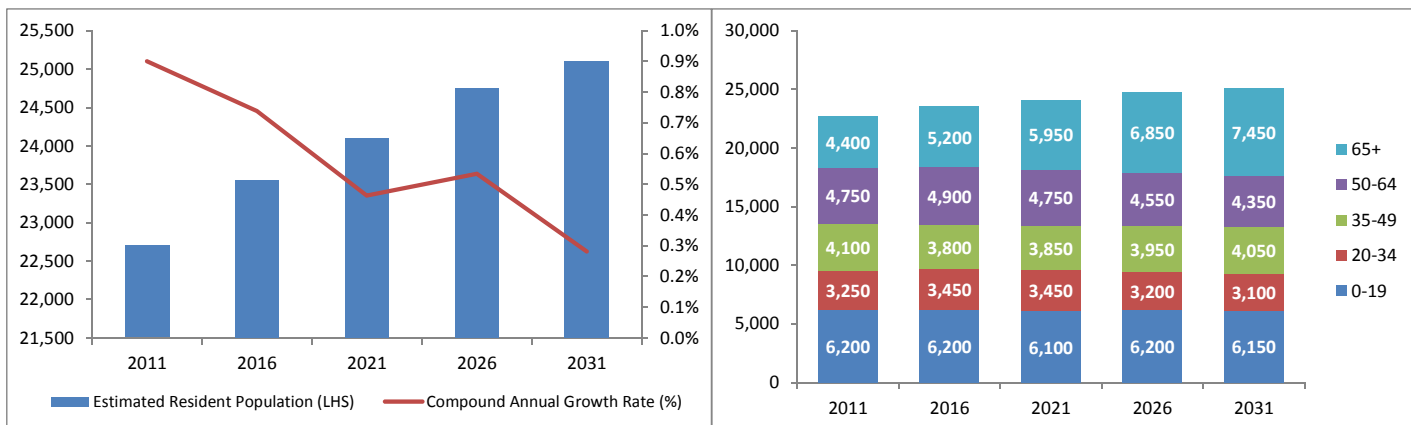
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	7	33	58	92	47	237
Sydney	15	19	46	47	-4	123
Regional NSW	44	33	38	38	11	164
Interstate	-110	-319	-45	7	85	-382
Overseas	26	48	35	20	17	146
<b>Total Net Migration</b>	<b>-18</b>	<b>-186</b>	<b>132</b>	<b>204</b>	<b>156</b>	<b>288</b>

Source: ABS

### 8.3.3 Population projections

- According to DP&E projections, the Richmond Valley LGA is projected to grow to 25,150 persons by 2031, at an average rate of 0.5% per annum (between 2016 and 2013).

**Figure 5. Projected Population and population by age (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- Growth is expected to be most pronounced amongst persons aged 65+, increasing to 7,450 by 2031.



- All other age cohorts are set to experience negative population growth - the net reduction expected to be largest within the 50-64 age cohort.

### 2.3.4 Labour force status

- Of all residents in the Richmond Valley, approximately 79% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 53% i.e. 8,802 of 16,500 residents.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking employment) at the time.
- The Richmond Valley LGA's employment rate resembles the North Coast's (92%).

**Table 8.4**

**Labour Force Status by Age (number) - Richmond Valley LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	541	146	687	698	1,385
20 - 29	1,157	171	1,328	548	1,876
30 - 39	1,505	128	1,633	546	2,179
40 - 49	1,935	140	2,075	592	2,667
50 - 59	1,978	94	2,072	948	3,020
60 - 69	801	23	824	1,780	2,604
70 - 79	151	5	156	1,562	1,718
80 - 84	21	0	21	554	575
85+	6	0	6	470	476
<b>Total</b>	<b>8,095</b>	<b>707</b>	<b>8,802</b>	<b>7,698</b>	<b>16,500</b>

Source: Census of Population and Housing (2011)

### 8.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are employed within the boundaries of the Richmond Valley LGA.
- Around 59.9% of employed residents also worked in the Richmond Valley LGA.

- The remaining 40.1% of working residents travel either to other North Coast LGAs (26.9%) or locations outside the North Coast (13.2%) for work.
- Of working residents who travel to other North Coast LGAs, popular workplace destinations include Lismore (18.0%), Ballina (5.6%) and Kyogle (2.1%) LGAs.

**Table 8.5**  
**Job Containment - Richmond Valley LGA**

	<b>Value</b>
Working residents	7,977
<u>Place of Work (number)</u>	
Richmond Valley	4,780
North Coast LGAs (ex. Richmond Valley)	2,144
Outside North Coast	1,053
<b>Total</b>	<b>7,977</b>
<u>Job Containment (%)</u>	
Richmond Valley	59.9%
North Coast LGAs	26.9%
Other	13.2%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The next table entails Job containment by industry classification for Richmond Valley LGA.
- Relative to the all industries average in the Richmond Valley LGA (59.9%), six industries achieved a higher rate of job containment.
- Of all industries, Rental, Hiring and Real Estate Services achieved the highest rate of job containment (76.5%) in 2011.

Table 8.6  
Job Containment by Industry - Richmond Valley LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	76.5%	16.7%	6.9%	100.0%
Accommodation and Food Services	72.9%	16.2%	10.9%	100.0%
Manufacturing	72.8%	15.1%	12.0%	100.0%
Agriculture, Forestry and Fishing	68.7%	11.6%	19.7%	100.0%
Retail Trade	63.7%	30.4%	5.9%	100.0%
Education and Training	63.5%	29.7%	6.8%	100.0%
<b>Across all industries</b>	<b>59.9%</b>	<b>26.9%</b>	<b>13.2%</b>	<b>100.0%</b>
Other Services	57.3%	34.4%	8.3%	100.0%
Public Administration and Safety	56.6%	35.1%	8.3%	100.0%
Financial and Insurance Services	54.9%	45.1%	0.0%	100.0%
Professional, Scientific and Technical Services	54.9%	34.5%	10.6%	100.0%
Arts and Recreation Services	54.6%	24.7%	20.6%	100.0%
Transport, Postal and Warehousing	53.8%	27.6%	18.6%	100.0%
Wholesale Trade	53.0%	36.0%	11.0%	100.0%
Health Care and Social Assistance	51.7%	39.8%	8.5%	100.0%
Administrative and Support Services	50.0%	25.5%	24.5%	100.0%
Information Media and Telecommunications	47.5%	44.3%	8.2%	100.0%
Electricity, Gas, Water and Waste Services	46.8%	36.7%	16.5%	100.0%
Mining	39.3%	7.1%	53.6%	100.0%
Construction	38.0%	26.1%	35.9%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

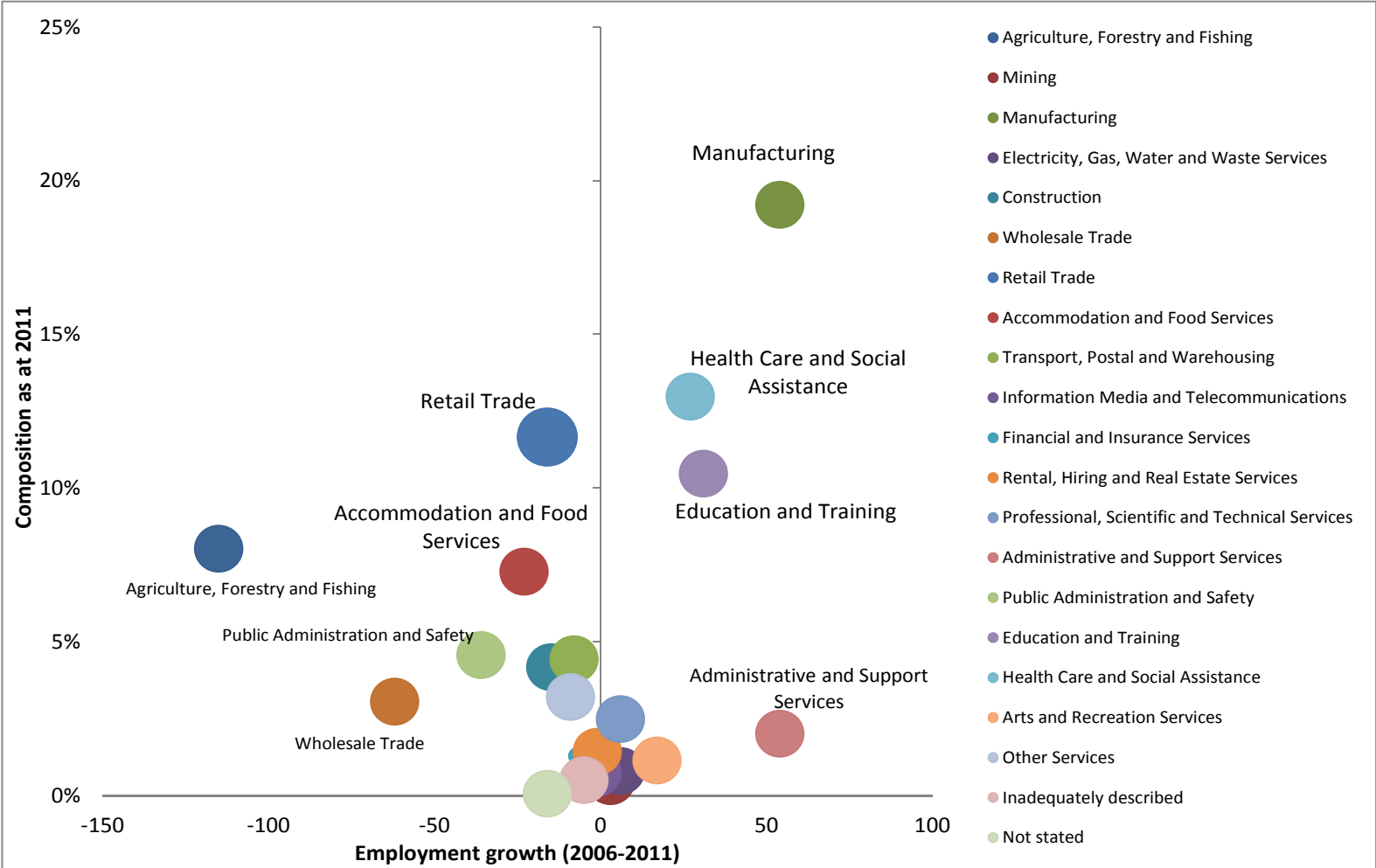
## 8.4 Employment and labour market trends

### 8.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Richmond Valley LGA and identify emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Richmond Valley LGA supported 6,151 jobs, accounting for 3.4% of total jobs in the North Coast region.
- Unlike the broader region, the composition of employment within the Richmond Valley LGA is skewed to primary and 'traditional' industries. The largest employing industry is Manufacturing, accounting for 19.2% of total jobs in the LGA – significantly above the North Coast average for this industry (6.8%).

- With the exception of this anomaly, the overall employment profile is similar to the broader North Coast region, with Health Care and Social Assistance (13.0%), Retail Trade (11.7%) and Education and Training (10.5%) being significant employing industries.
- The provision of white collar employment is limited (15.0% of jobs) while the skew to primary industries is well above the average for the broader region – 31.4% (Richmond Valley LGA) vs. 17.8% (North Coast region).
- Over the five years to 2011, the Richmond Valley LGA experienced a contraction in employment of 116 jobs.
- In comparison to national and NC region trends, solid employment growth was incurred in the Manufacturing industry (+54 jobs), on par with Administrative and Support Services (+54 jobs).
- At the same time, 13 industries registered an outright decline in employment, with the greatest contractions registered in Agriculture, Forestry & Fishing (-115 jobs), Wholesale Trade (-62 jobs) and Public Administration and Safety (-36 jobs).

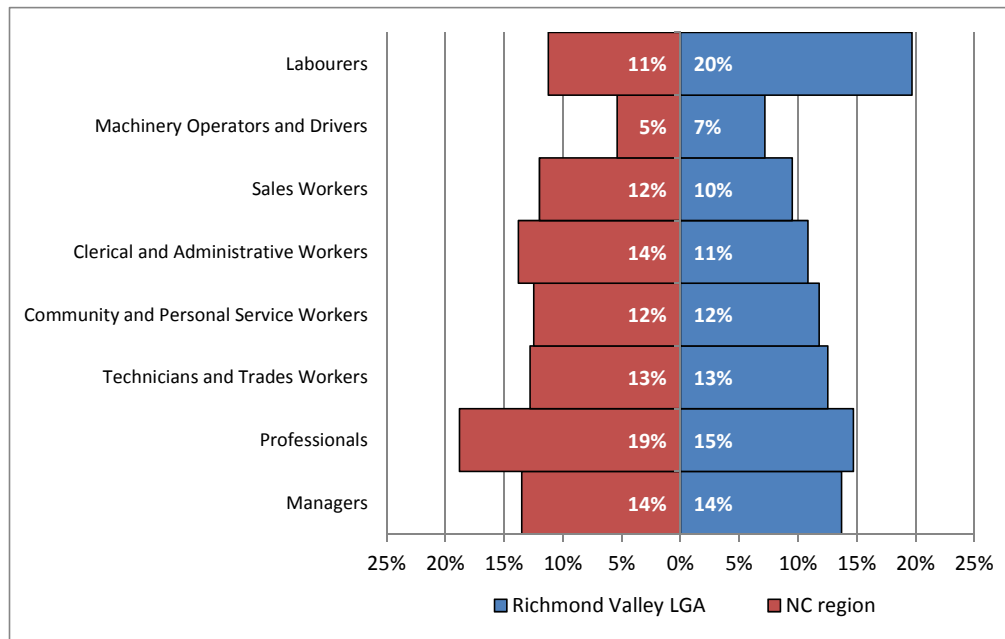
Figure 1. Employment composition and growth by industry, Richmond Valley LGA



### 8.4.2 Occupation profile

- As at Census 2011 the dominant occupation category for workers in the Richmond Valley LGA was 'Labourers', accounting for around 20% of the LGA's workforce, followed by 'Professionals' (15%).

**Figure 2. Occupation Composition (2011)**



Source: ABS, MacroPlan Dimasi

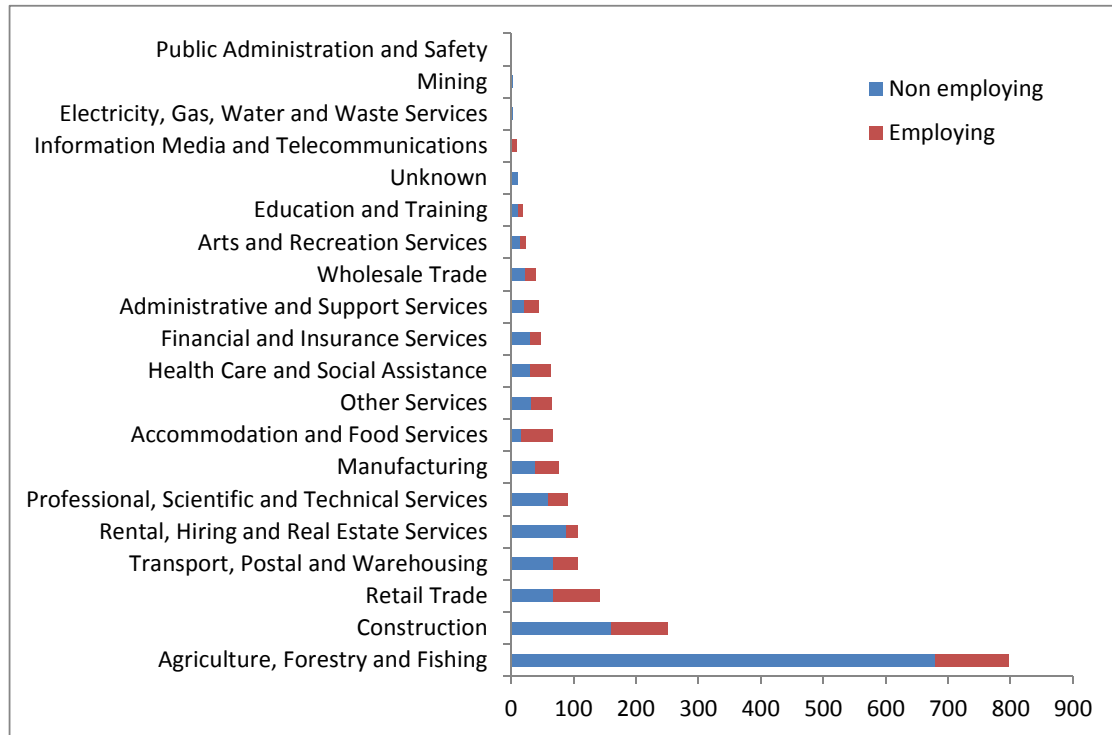
- In comparison to the broader North Coast region, Richmond Valley's occupation profile exhibits a skew to 'blue collar' occupations.

### 8.4.3 Business composition & change

- As at June 2011, there were 1,964 businesses operating within the Richmond Valley LGA, with 69% being non employing/sole trading businesses.
- While it accounts for 8.0% of all jobs within the LGA, businesses in the Agriculture, Forestry and Fishing industry account for 40% of total businesses. However, of the 796 businesses within this industry, only 117 of these are employing.

- At June 2011, there were three businesses employing 200 or more workers in the Richmond Valley LGA – all of which in the Manufacturing industry<sup>7</sup>.

**Figure 3. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, business growth within the Richmond Valley LGA totalled 42, of which 40 occurred within non-employing businesses.
- Business growth was most prevalent in the Health Care and Social Assistance industry (+21).
- The number of businesses in Information Media and Telecommunications (-9), Wholesale Trade (-8) and Manufacturing (-7) contracted.

<sup>7</sup> 8165.0 - Counts of Australian Businesses, including Entries and Exits

**Table 8.7**  
**Business Composition and Change - Richmond Valley LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	24	-3	21
Retail Trade	-2	10	8
Accommodation and Food Services	-2	-2	-4
Education and Training	3	-3	0
Construction	12	-5	7
Public Administration and Safety	3	0	3
Manufacturing	1	-8	-7
Professional, Scientific and Technical Services	2	12	14
Other Services	6	-5	1
Transport, Postal and Warehousing	-9	14	5
Agriculture, Forestry and Fishing	14	-11	3
Administrative and Support Services	-2	5	3
Wholesale Trade	-10	2	-8
Rental, Hiring and Real Estate Services	-1	-1	-2
Financial and Insurance Services	7	-3	4
Arts and Recreation Services	8	0	8
Electricity, Gas, Water and Waste Services	-3	0	-3
Information Media and Telecommunications	-6	-3	-9
Mining	-3	3	0
Not Classified	-2	0	-2
<b>Total</b>	<b>40</b>	<b>2</b>	<b>42</b>

*Source: ABS*

#### 8.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- As at 2011, 40% of Richmond Valley's population was aged 50 years or above. Consequently, retirement in the local workforce will be high over the next 20 years. In this environment, promoting job opportunities for younger residents should be encouraged to supplement this labour 'gap'.
- Over the five years to 2011, employment growth was solid within the Manufacturing industry with an additional 54 jobs. However, looking ahead, employment growth within this sector is anticipated to be weaker due to sustained competition from international manufacturers.
- More recently, there has been a notable rise in the number of skilled workers in the Richmond Valley LGA. This has been evidenced by solid jobs growth in the Administrative and Support Services and Professional, Scientific and Technical Services industries.



- Looking ahead, employment growth in white-collar categories is expected to dominate. However, some jobs growth is also anticipated for industrial-based industries over the next 20 years.

## 8.5 Employment Land Supply

### 8.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Richmond Valley LGA.
- The information presented in this supply section is based on the Richmond Valley Local Environmental Plan 2012.
- Three main employment land use categories are used in the Richmond Valley LGA i.e. Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	0.9	0%
	B2. Local Centre	8.8	2%
	B3. Commercial Core	33.9	8%
	<b>Total</b>	<b>43.5</b>	<b>11%</b>
Industrial	IN1. General Industrial	332.4	82%
	<b>Total</b>	<b>332.4</b>	<b>82%</b>
Special Uses	SP2. Infrastructure	28.0	7%
	<b>Total</b>	<b>28.0</b>	<b>7%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>403.9</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- In total, there is approximately 403.9 hectares of land zoned for urban employment purposes in the Richmond Valley LGA.
- Representing the largest allocation, approximately 82% of zoned land is assigned to industrial uses – in total 332.4 hectares.
- At 43.5 hectares, business zoned land represents the next largest group, making up 11% of urban zoned land. The majority of this allocation is B3 Commercial Core (33.9 hectares).

# Map 8.1













## Richmond Valley Council

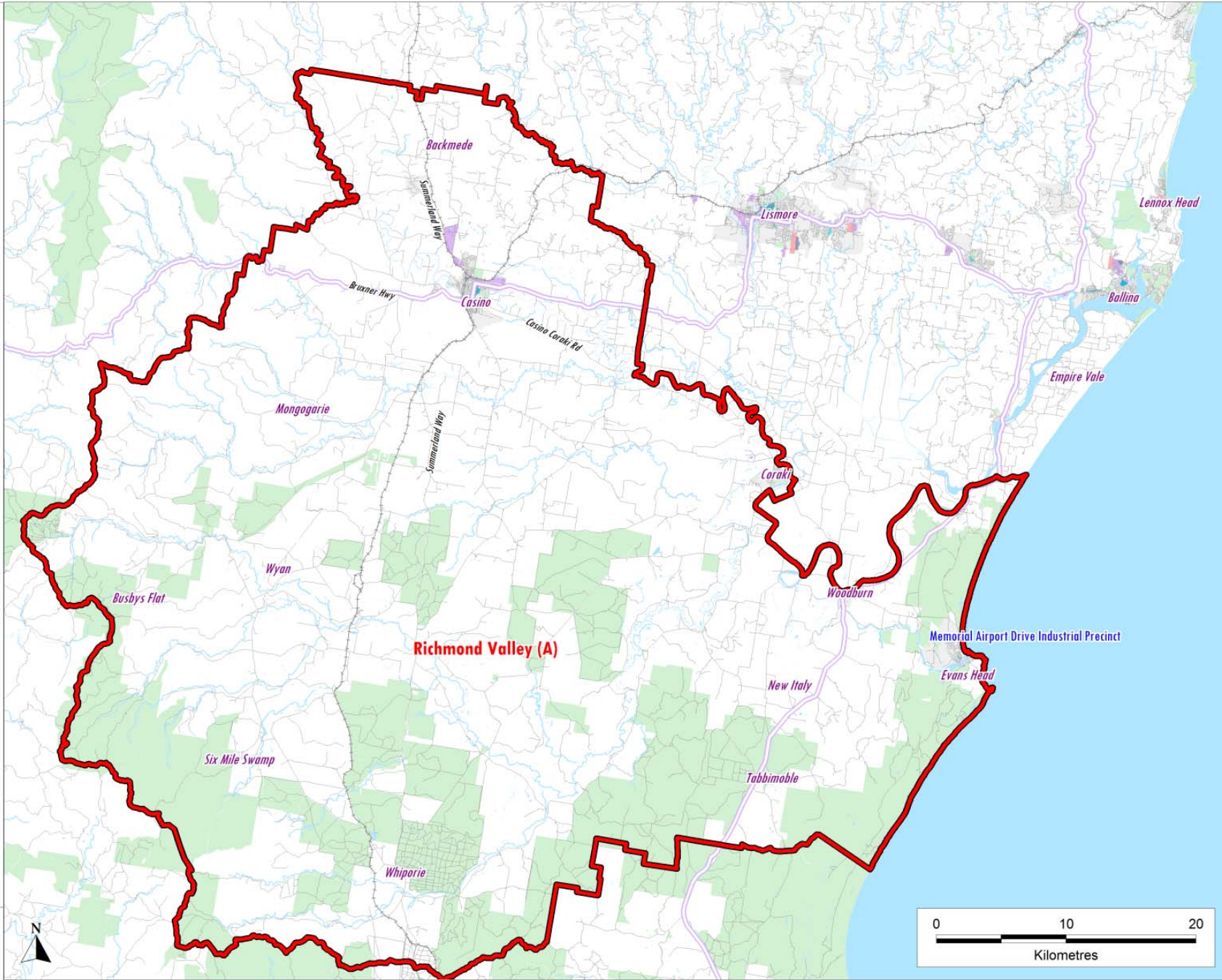
### Employment Land Zones

#### Legend \*

 Richmond Valley Council Boundary

#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



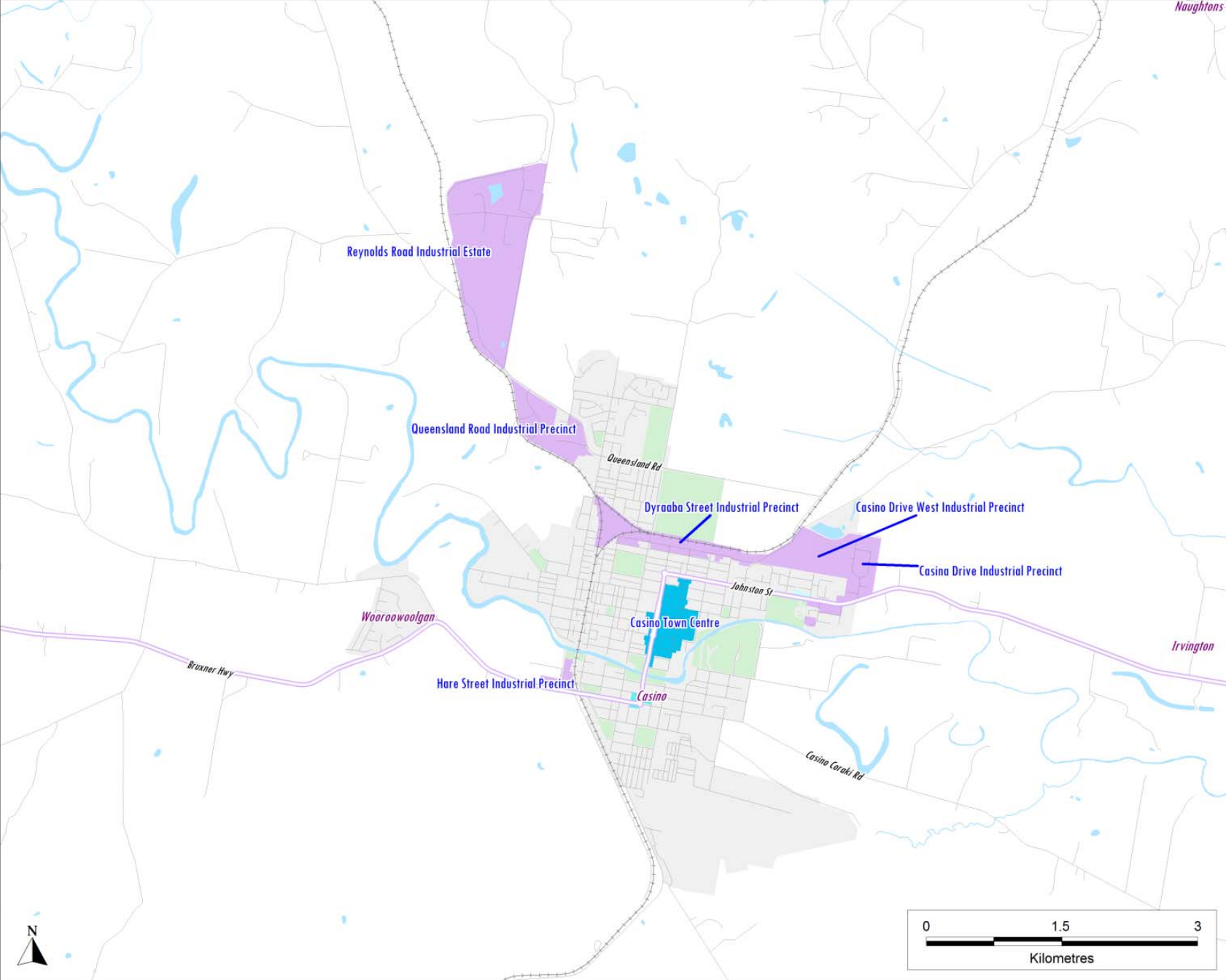
# Map 8.2

## Casino Employment Land Zones

### Legend \*

#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 8.5.2 Industrial – Existing supply

- According to the Richmond Valley LEP 2012, there is one industrial land use zone i.e. IN1 General Industrial.
- Our examination has revealed seven major industrial precincts for the Richmond Valley LGA (as presented below).

**Table 8.9**  
**Established Industrial Precincts - Richmond Valley LGA**

<b>Name</b>	<b>Total Area</b> (hectares)	<b>Developed</b> (hectares)	<b>Developed</b> (%)
Reynolds Road Industrial Estate	160.0	70.0	44%
Queensland Road Industrial Precinct	45.0	30.0	67%
Casino Drive West Industrial Land	44.0	44.0	100%
Dyraaba Street Industrial Precinct	35.0	17.0	49%
Casino Drive Industrial Precinct	23.0	19.0	83%
Memorial Airport Drive Industrial Precinct	15.4	15.4	100%
Hare Street Industrial Precinct	10.0	6.0	60%
<b>Total</b>	<b>332.4</b>	<b>201.4</b>	<b>61%</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our examination include:

- The largest precinct is the **Reynolds Road Industrial Estate** (160 hectares).
- This precinct is located approximately 2km north of Casino. Through Reynolds Road, the precinct has access to the Summerland Way (a key arterial road).
- Existing tenants include Boral Pole Plant, Riverina Stockfeed, Cattle Sale Yards Complex and the Northern Co-op Meat Company Abattoir.
- Five other established precincts were identified, ranging between 10 and 45 hectares in size.



- Notably, the **Casino Drive West Industrial Land** hosts the annual Norco Primex (Primary Industry Exhibition), as well as a number of other trade shows. While the industrial precinct may 'appear' to be vacant, it is otherwise occupied and unavailable for redevelopment (at this point in time). As such, it has been excluded from our estimate of future capacity.
- Of the total, it is estimated that around 201.4 hectares or 61% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 131.0 hectares of zoned land available for future development.
- At an average floor space ratio of 0.6:1, this equates to approximately 78.6 hectares of industrial floorspace.

### 8.5.3 Industrial – Future supply

- Our examination has revealed there is approximately 131 hectares of zoned industrial land capacity in the Richmond Valley LGA.
- Entailing 52 hectares, a proportion of future supply is expected to come from the **Casino Drive Industrial Precinct**, which lies within the Future Urban Growth Boundary. This precinct has direct access to the Sydney-Brisbane rail corridor.

**Table 8.10**

**Future Industrial Precincts - Richmond Valley LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
Casino Drive Industrial Precinct	52.0	10 - 20
<b>Total</b>	<b>52.0</b>	

*Note: Within Future Urban Growth Boundaries*

*Source: MacroPlan Dimasi*

- Previously earmarked as a future precinct, the **Spring Grove Road Precinct** is used by Primex and other industry trade shows. At this stage, it is unavailable for redevelopment and has been excluded from the future capacity estimate.

#### 8.5.4 Retail & Commercial – Existing supply

In terms of population, the Richmond Valley LGA is relatively small in comparison with some of the larger coastal LGAs, resulting in a much smaller provision of business zoned land and associated retail floorspace. As previously identified, the resident population of Richmond Valley is around 23,150 persons and is expected to grow at about 0.5% per annum, to reach 25,150 persons by 2031. Tourism visitation to the LGA equates to a year-round population of about 1,300 persons. The population level in the LGA is insufficient to support sub-regional and regionally oriented retail/commercial centres and therefore the provision is generally local/convenience in nature, and of relatively small scale.

The Richmond Valley LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 8.3 and Map 8.4.

- The Richmond Valley LGA centres hierarchy generally consists of the following structure:
  - Casino Town Centre (B1, B2 and B3 precincts).
  - Village centres (such as Coraki and Woodburn) and dispersed commercial floorspace in smaller villages (such as Broadwater, Whiporie and Rappville).
  - Non-business zoned commercial/retail floorspace.
- There are no discount department stores (dds), or department stores, nor any major enclosed shopping centres in the Richmond Valley LGA, although there is a small Target Country in Casino. The closest higher order shopping facilities are located in Lismore and Ballina.

#### Casino Town Centre

- The Casino Town Centre is the dominant retail destination within the LGA, occupying around 37.6 ha of business zoned land, including the 33.9 ha B3 town centre core, and a 0.9 ha B1 precinct located along the Johnston Street to the north and a 2.9 ha B2 precinct located along the Centre Street to the south.

- The town centre includes Woolworths and Coles and Aldi supermarkets a range of retail specialty retail including cafes, restaurants, pubs, retail services, pharmacies, A Home Hardware Store, discount variety stores, independent fashion and sporting goods retailers.
- The town centre is estimated to contain 30,000 – 35,000 sq.m of retail floorspace, including 20,000 sq.m of traditional retail floorspace and 10-15,000 sq.m of bulky goods type floorspace.

### **Other centres/villages**

There is only one other business zoned precinct in the LGA, with the village of Evans Head. Although there are designated villages located at Woodburn, Coraki and Rappville, these villages do not have business zoned land.

- Evans Head: is a small coastal village that includes an IGA supermarket of approximately 1,500 sq.m, supporting specialty retail, and a Thrifty Link hardware store. The commercial area includes 5.9 ha of B2 zoned land.
- Woodburn: is a small village about 10km inland from Evans Head that provides a small collection of strip retail, including a small IGA supermarket and about 1,500 sq.m of retail floorspace in total, although this provision is not located on business zoned land.
- Coraki: is a small village located approximately 30 km north west of Evans Head that includes a Spar supermarket and a small assortment of strip retail.



# Map 8.3

## Richmond Valley Council

### Retail Provision Legend \*

Ballina Shire Boundary

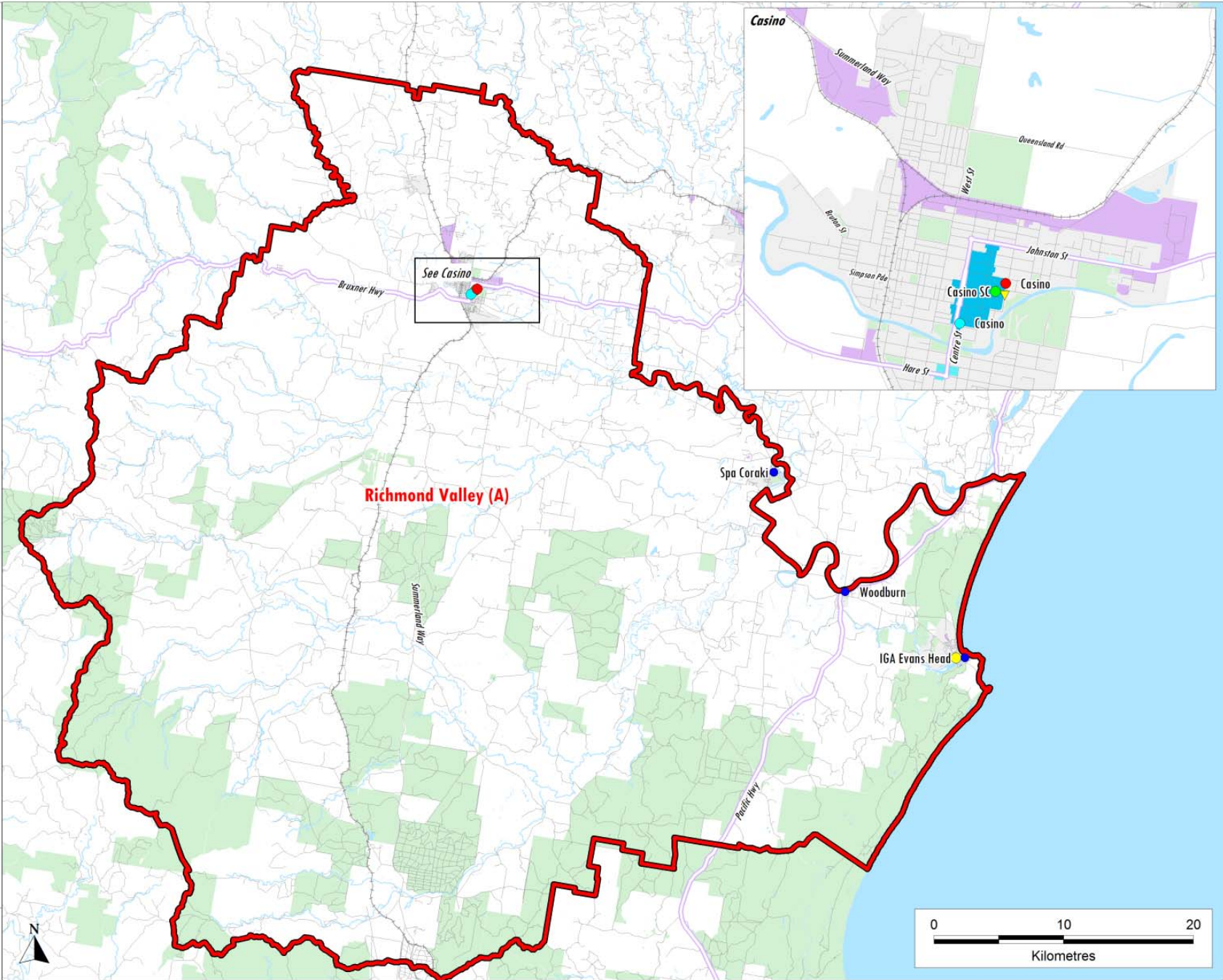
#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

#### Retail Competition

- Target Country
- Woolworths
- Coles/Bi-Lo
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores





# Map 8.4

**Richmond Valley Council**












**Bulky / Homemaker Goods Retailing**

**Legend \***

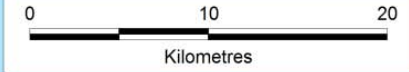
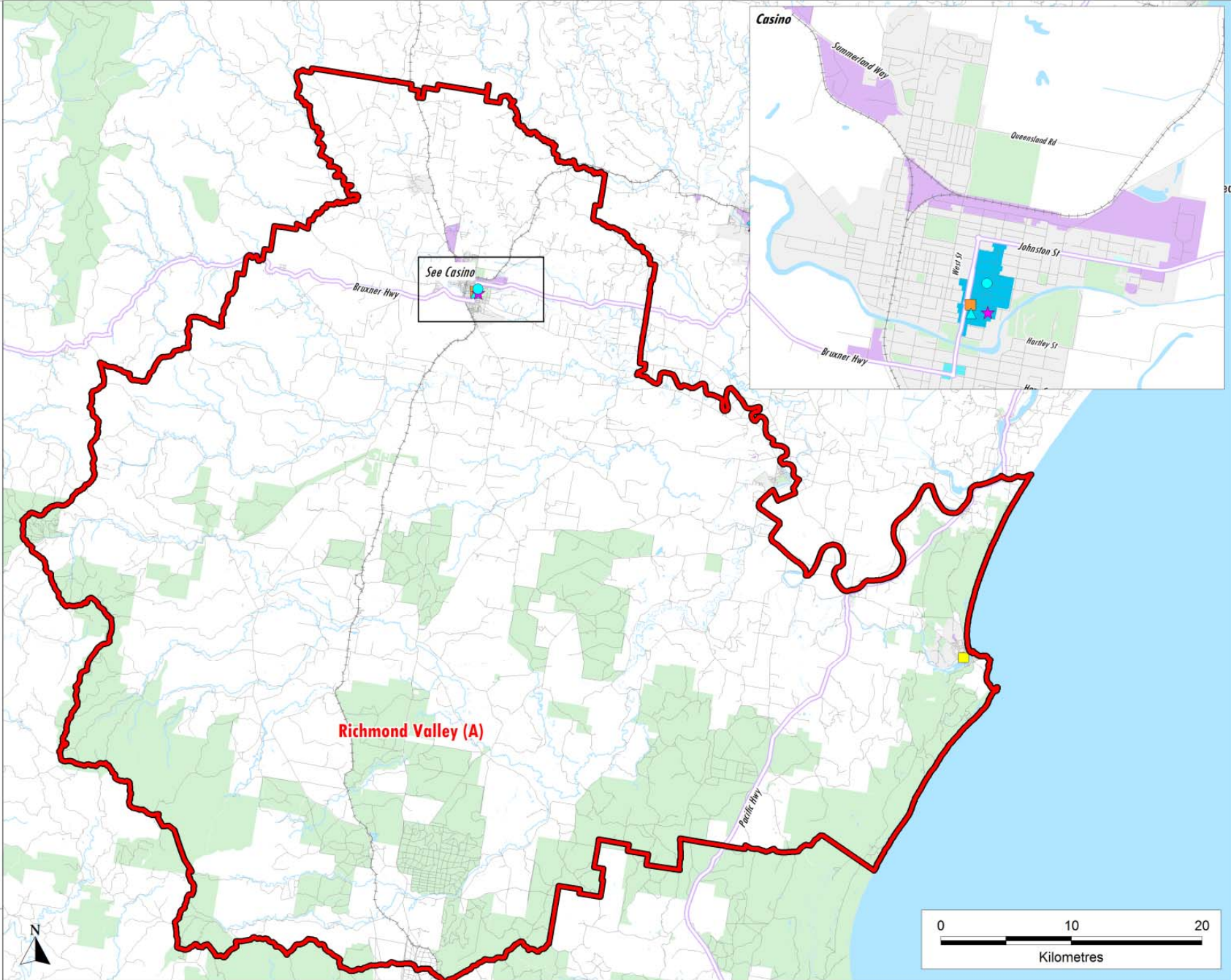
**Bulky Goods Retailers**

-  Richmond Valley Council Boundary
-  Home Hardware
-  Thrifty Link
-  Repco
-  Carpet Court
-  Betta Home Living

**Land Zones**

- |   |   |
|---|---|
|  B1  |  B7  |
|  B2  |  IN1 |
|  B3  |  IN2 |
|  B4  |  IN3 |
|  B5  |  IN4 |
|  B6 |   |

\* Hollow symbols indicate proposed stores



### **Business zoned land capacity for retail and commercial floorspace**

Table 8.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **43.5 hectares of business zoned land** within the Richmond Valley LGA, of which 0.9 ha is B1 zoned land, about 8.8 ha is B2 zoned land and about 33.9 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is no B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts.
- There is no B4, B6 or B7 zoned land in the LGA.
- The Richmond Valley LEP 2012 does not specify FSRs. We have therefore applied estimated FSRs for each business zone type based of the average FSR for these zone types across the North Coast region.
- We estimate the indicative retail/commercial floorspace capacity of existing business zones in the Richmond Valley LGA to be in the order of 925,940 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 25%, given the relative size and mix of the retail offer compared with nearby Lismore. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 8.11**  
**Richmond Valley LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B1*	0.9	0.9	7,769
Total B2*	8.8	1.2	105,373
Total B3*	<u>33.9</u>	2.4	<u>812,798</u>
<b>Total LGA</b>	<b>43.5</b>		<b>925,939</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

### 8.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within the Richmond Valley LGA.

### 8.5.6 Special Uses – Existing supply

- According to the Richmond Valley LEP 2012, there are two special uses land use zones i.e. SP1 Special Uses and SP2 Infrastructure.
- Classified roads, cemeteries, waste management facilities, water supply systems and some other purposes have been removed from our estimate of urban employment land.
- As such, the Special Uses category entails 28 hectares of land, comprising of 24 hectares assigned for 'depot' purposes, and four hectares for the Casino and District Memorial Hospital (health service facility).
- The largest allocation (20.8 hectares) is for 'depot' purposes.
- Positioned adjacent to the Casino Station, the Casino and District Memorial Hospital is a local community, level-3 acute care rural hospital within the Northern NSW Local Health District. It provides care to over 2,800 patients per annum and a range of medical services and procedures.
- Of the four hectare allocation, we estimate approximately 60% of this land is developed, meaning there is 1.6 hectares available for future development.



**Figure 4.** Casino and District Memorial Hospital Regional Context



*Source: SIX maps (NSW Department of Planning and Environment)*

### 8.5.7 Special Uses – Future Supply

- A \$3 million redevelopment of the Casino and District Memorial Hospital is currently underway. The redeveloped emergency department at the hospital will include four new treatment bays and two new resuscitation bays.

**Figure 5. Casino and District Memorial Hospital**

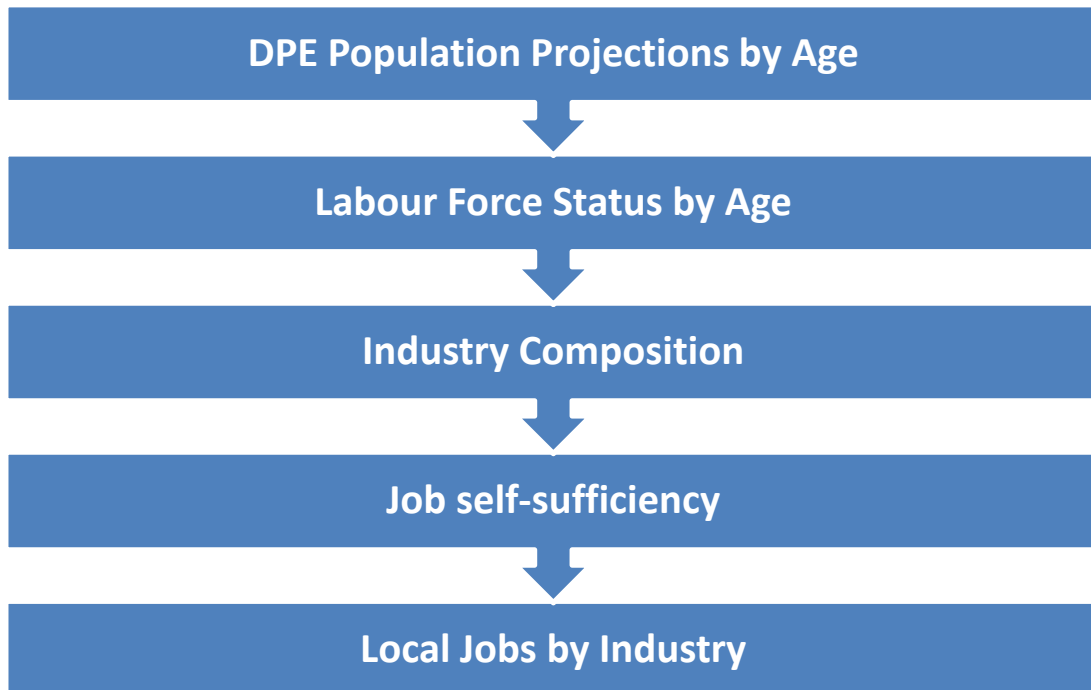


*Source: The Northern Star, 2013*

## 8.6 Demand for employment land

### 8.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in the Richmond Valley LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Richmond Valley LGA to generate jobs.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Richmond Valley LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  3. Converting jobs by industry into specific built form types
  4. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative methodology.

### 8.6.2 Employment Projections

- In contrast to the 2006 and 2011 period (-116 jobs), employment in the Richmond Valley LGA is projected to increase over the forecast period. Over the twenty years to 2031, it is expected the workforce will expand by 458 jobs.
- As at 2021, the LGA is projected to support 6,332 jobs, expanding by 181 jobs since 2011.

- By 2031, employment in the LGA is expected to increase further to 6,609 – an additional 277 jobs between 2021 and 2031.
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+128), Education and Training (+83), Accommodation and Food Services (+81), Education and Training (+79) and Retail Trade (+76).
- Employment in the Manufacturing industry, the largest employing industry in Richmond Valley LGA (as at 2011), is anticipated to decrease i.e. from 1,182 in 2011 to 1,111 jobs as at 2031.
- Notably, outright job losses is predicted for five industries – two largest being Manufacturing (-71) and Agriculture, Forestry and Fishing (-34).

**Table 3.14**  
Employment by Industry - Richmond Valley LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	798	868	926	128
Education and Training	644	692	727	83
Accommodation and Food Services	448	481	529	81
Retail Trade	717	737	793	76
Transport, Postal and Warehousing	273	298	317	44
Professional, Scientific and Technical Services	153	167	194	41
Construction	257	259	297	40
Rental, Hiring and Real Estate Services	88	90	121	33
Wholesale Trade	188	197	214	26
Electricity, Gas, Water and Waste Services	49	58	73	24
Other Services	197	215	218	21
Financial and Insurance Services	79	90	94	15
Administrative and Support Services	124	128	134	10
Mining	29	30	38	9
Information Media and Telecommunications	45	38	40	-5
Arts and Recreation Services	70	74	64	-6
Public Administration and Safety	281	279	259	-22
Agriculture, Forestry and Fishing	494	472	460	-34
Other*	35	0	0	-35
Manufacturing	1,182	1,158	1,111	-71
<b>Total jobs</b>	<b>6,151</b>	<b>6,332</b>	<b>6,609</b>	<b>458</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.



**Table 8.13**  
Industry and Land Use Conversion Matrix - Richmond Valley LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use type, as presented in Table 8.14.

**Table 8.14**  
Employment Additions by Land Use Type - Richmond Valley LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	1	2	8	14	0	0
Construction	0	4	2	34	0	0
Wholesale Trade	7	14	2	4	0	0
Retail Trade	19	53	1	3	0	0
Accommodation and Food Services	23	34	10	14	0	0
Transport, Postal and Warehousing	5	4	20	15	0	0
Information Media and Telecommunications	0	2	0	0	0	0
Financial and Insurance Services	11	4	0	0	0	0
Rental, Hiring and Real Estate Services	2	30	0	0	0	0
Professional, Scientific and Technical Services	14	27	0	0	0	0
Administrative and Support Services	4	6	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	5	4	0	0	43	32
Health Care and Social Assistance	14	12	0	0	56	46
Arts and Recreation Services	4	0	0	0	0	0
Other Services	18	3	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 8.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Richmond Valley LGA (presented in Table 8.15).

**Table 8.15**  
Indicative Employment Density by Industry and Land Use Type - Richmond Valley LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

*Source: MacroPlan Dimasi*

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 8.16**  
Additional Floorspace by Industry under the Base Scenario (sqm) - Richmond Valley LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	160	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	30	60	1,950	3,550	0	0
Construction	10	110	250	5,130	0	0
Wholesale Trade	210	420	350	700	0	0
Retail Trade	780	2,120	140	390	0	0
Accommodation and Food Services	1,160	1,680	1,490	2,150	0	0
Transport, Postal and Warehousing	150	110	4,080	3,020	0	0
Information Media and Telecommunications	0	50	0	0	0	0
Financial and Insurance Services	270	100	0	0	0	0
Rental, Hiring and Real Estate Services	50	760	0	0	0	0
Professional, Scientific and Technical Services	350	680	0	0	0	0
Administrative and Support Services	110	140	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	190	140	0	0	2,150	1,600
Health Care and Social Assistance	560	460	0	0	3,350	2,770
Arts and Recreation Services	160	0	0	0	0	0
Other Services	730	120	0	0	0	0
<b>Total</b>	<b>4,760</b>	<b>6,950</b>	<b>8,280</b>	<b>15,100</b>	<b>5,500</b>	<b>4,370</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated an additional **4,670 sq.m of commercial**, **8,280 sq.m of industrial** and **5,500 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for an additional **6,950 sq.m of commercial**, **15,100 sq.m of industrial** and **4,370 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 8.17.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better representation of actions and decisions made by businesses.

**Table 8.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Richmond Valley LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	120	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	30	50	1,460	2,660	0	0
Construction	0	90	190	3,840	0	0
Wholesale Trade	160	320	260	530	0	0
Retail Trade	580	1,590	110	290	0	0
Accommodation and Food Services	870	1,260	1,120	1,620	0	0
Transport, Postal and Warehousing	110	80	3,060	2,270	0	0
Information Media and Telecommunications	0	40	0	0	0	0
Financial and Insurance Services	200	70	0	0	0	0
Rental, Hiring and Real Estate Services	40	570	0	0	0	0
Professional, Scientific and Technical Services	260	510	0	0	0	0
Administrative and Support Services	80	110	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	140	110	0	0	1,610	1,200
Health Care and Social Assistance	420	350	0	0	2,510	2,080
Arts and Recreation Services	120	0	0	0	0	0
Other Services	550	90	0	0	0	0
<b>Total</b>	<b>3,560</b>	<b>5,240</b>	<b>6,210</b>	<b>11,330</b>	<b>4,120</b>	<b>3,280</b>

Source: MacroPlan Dimasi

- The Alternative Scenario indicates an additional **3,560 sq.m of commercial**, **6,210 sq.m of industrial** and **4,120 sq.m of special use** floorspace demand will materialise by 2021.
- Under the Alternative scenario, demand is anticipated to rise relative to the prior ten year period, with the exception of special uses – consistent with higher employment growth. Over the ten years to 2031, an additional **5,240 sq.m of commercial**, **11,440 sq.m of industrial** and **3,280 sq.m of special uses** floorspace is expected to eventuate.

#### 8.6.4 Demand for Employment Land

- This section provides a coherent description of methodology applied to derive estimated demand for employment land across Richmond Valley LGA. It outlines data sources, assumptions and calculations deployed to provide a consistent, evidence-based projection of demand that can be applied to employment land across the Richmond Valley LGA.
- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- According to the July 2014 Department of Planning and Environment GIS layers, FSR references are limited in the Richmond Valley LGA. As such, our assessment has relied on average FSRs applied across the broader North Coast region (as presented in Table 8.18).
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **0.9–1.2 hectares of commercial**, **2.9–3.9 hectares of industrial** and **0.9–1.2 hectares of special uses** land will be required by 2031.

Table 8.18

Demand for Employment Land (2031) - Richmond Valley LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	0.9 - 1.2	1.0	0.9 - 1.2
Industrial	1.8 - 2.3	0.6	2.9 - 3.9
Special Uses	0.7 - 1.0	0.8	0.9 - 1.2

Source: MacroPlan Dimasi

#### 8.6.5 Demand for Retail Floorspace and Land

The potential drivers of future demand for retail floorspace in the Richmond Valley LGA are summarised below:

- Population growth – which is expected to be low-moderate, growing at an average of 0.5% per annum to 2031 (a net increase of 10.7% or 2,400 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 8.19 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Richmond Valley LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 8.19 shows the following:

- The residential population of the Richmond Valley LGA generates approximately **43,000 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **1.9 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **10,577 sq.m** by 2031, an increase of about **19%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **2,779 sq.m**, and is expected to increase by about **550 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **2.2 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

**Table 8.19**  
**Richmond Valley LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\***

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	23,150	23,450	24,150	24,700	25,150	0.5%
Tourism equiv. pop	1,334	1,352	1,392	1,424	1,450	0.5%
<b>Retail exp. (\$M)</b>						
Food & liquor	126	129	139	149	159	1.4%
Food catering	28	29	32	34	37	1.7%
Apparel	20	21	22	23	24	0.9%
Household	42	43	45	47	49	0.9%
Leisure	12	12	13	14	14	1.1%
General	20	21	22	24	26	1.5%
Retail services	<u>6</u>	<u>7</u>	<u>7</u>	<u>7</u>	<u>8</u>	<u>1.1%</u>
<b>Total</b>	<b>255</b>	<b>262</b>	<b>280</b>	<b>299</b>	<b>318</b>	<b>1.3%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	13,975	14,370	15,443	16,571	17,698	1.4%
Food catering	4,698	4,854	5,282	5,738	6,204	1.7%
Apparel	3,714	3,782	3,964	4,149	4,323	0.9%
Household	14,020	14,273	14,963	15,662	16,316	0.9%
Leisure	1,986	2,032	2,157	2,286	2,411	1.1%
General	3,344	3,449	3,734	4,036	4,343	1.5%
Retail services	<u>1,080</u>	<u>1,105</u>	<u>1,173</u>	<u>1,243</u>	<u>1,311</u>	<u>1.1%</u>
<b>Total</b>	<b>42,998</b>	<b>44,124</b>	<b>47,188</b>	<b>50,395</b>	<b>53,575</b>	<b>1.5%</b>
<b>Floorspace per capita</b>	<b>1.86</b>	<b>1.88</b>	<b>1.95</b>	<b>2.04</b>	<b>2.13</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	1,334	1,352	1,392	1,424	1,450	0.5%
Floorspace per capita	<u>1.67</u>	<u>1.69</u>	<u>1.76</u>	<u>1.84</u>	<u>1.92</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>2,230</b>	<b>2,289</b>	<b>2,448</b>	<b>2,614</b>	<b>2,779</b>	<b>1.3%</b>
<b>Total retail demand (sq.m)</b>	<b>45,228</b>	<b>46,413</b>	<b>49,635</b>	<b>53,009</b>	<b>56,354</b>	<b>1.3%</b>
<b>Demand growth (14-31)</b>					<b>11,126</b>	
<b>Estimated land take (ha)</b>					<b>2.2</b>	

\*Constant 2013/14 dollars & including GST

\*\*Spend adjusted as tourists would spend on convenience, dining, leisure, but may spend at higher rate per day while travelling.

Source: MarketInfo; MacroPlan Dimasi

## 8.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' assessment of employment land for the Richmond Valley LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future provision and projected demand or take-up of employment land in the Richmond Valley LGA.

Key findings pertaining to our gap assessment are presented in Table 8.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	43.5	4.4	0.0	4.4	3.2	1.1
Industrial	332.4	131.0	52.0	183.0	3.4	179.6
Special Uses	28.0	3.0	0.0	3.0	1.1	1.9

Source: MacroPlan Dimasi

- Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Richmond Valley LGA (out to 2031).
- Notably, the stock of zoned business and special use zoned land will almost be fully exhausted by 2031.
- Over the forecast, it is estimated:
  - *Supply of business land will exceed demand by 1.1 hectares*
  - *Supply of industrial land will exceed demand by 179.6 hectares*
  - *Supply of special uses land will exceed demand by 1.9 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Richmond Valley LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.



- As a result of locational and environmental constraints, more employment land may be required in Richmond Valley LGA, particularly to foster emerging businesses and industries.
- It is recognised that the Richmond Valley LGA will need to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 1.1 hectares and 1.9 hectares respectively available for development as at 2031).
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Richmond Valley LGA.
- It is believed some future demand for health service purposes could be accommodated within business zoned land.

## 8.8 Conclusions

### 8.8.1 Commercial, Industrial and Special Uses

As at 2011, the Richmond Valley LGA resident population totalled 22,717 persons, increasing by 989 persons over the five years to 2011. By age, growth in the 50-64 and 65+ age cohorts expanded by 564 and 573 persons respectively. In contrast to most LGAs in the North Coast, there has been some growth in young working residents. Albeit moderate, this cohort expanded by 153 persons over the five year period.

According to Census data, the Richmond Valley LGA supported 6,151 jobs or 3.4% of the total workforce throughout the North Coast in 2011. The largest employing industry is manufacturing (19.2%), which corresponds with the large allocation of industrial zoned land (82%) in the region. Similar to other LGAs in the North Coast, the next three largest employing industries are population service-orientated i.e. Health Care and Social Assistance (13.0%), Retail Trade (11.7%) and Education and Training (10.5%).

Employment has contracted in the Richmond Valley LGA. Between 2006 and 2011, the workforce reduced by 116 jobs. Representing the sixth largest employing industry, approximately 115 jobs were shed in the Agriculture, Forestry and Fishing industry over this period, offsetting gains made in Manufacturing (+54 jobs) and Administration and Support Services (+54 jobs).

Key economic and demographic drivers and associated outcomes for the Richmond Valley LGA include:

- DPE projections suggest the rate of population growth will ease in Richmond Valley LGA, forecast to average 0.5% per annum out to 2031. With the exception of 65+ persons, all age cohorts are expected to incur reductions.
- Ageing to gather momentum over the forecast period, resulting in greater demand for health and social care services.
- Sustained competition from international manufacturers to curtail growth in this industry
- Consolidation in the agricultural sector to expected to result in job losses

Our employment projections indicate 460 additional jobs for the Richmond Valley LGA by 2031. A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises.

Our estimates of future demand indicate an additional **8,800–11,710 sq.m of commercial, 11,126 sq.m of retail, 17,540–23,380 sq.m of industrial and 7,400–9,870 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **0.9–1.2 hectares of commercial, 2.2 hectares of retail, 2.9–3.9 hectares of industrial and 0.9–1.2 hectares of special uses** land will be required by 2031.

Overall, the stock of zoned employment land is sufficient to accommodate future employment needs of the Richmond Valley LGA. Notably, the stock of zoned business and special use zoned land will almost be fully exhausted by 2031.

Over the forecast, it is estimated:

- *Supply of business land will exceed demand by 1.1 hectares*
- *Supply of industrial land will exceed demand by 179.6 hectares*
- *Supply of special uses land will exceed demand by 1.9 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Richmond Valley LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market needs, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Richmond Valley LGA, particularly to foster emerging business needs.

However, it is recognised that there is a need for Richmond Valley LGA to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 1.1 hectares and 1.9 hectares respectively available for development as at 2031).

To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Richmond Valley LGA.

Finally, it is believed some future demand for health services could be accommodated within business zoned land.

### 8.8.2 Retail

We make the following preliminary comments in relation to retail market conditions within the Richmond Valley LGA:

- Richmond Valley LGA has a small population with low tourist visitor numbers. The population of the LGA, even by 2031, will be too small to trigger thresholds that would mean that additional major tenants and/or enclosed shopping centre floorspace could be supported.
- The provision of convenience oriented retail facilities is reasonable, with four supermarkets greater than 1,000 sq.m, serving an LGA population of 23,150 (about one per 5,800 persons). The national average in regional locations is about one per 6,000 – 8,000 persons).
- Most of the retail provided in the Casino Town Centre is strip retail, which trades at much lower levels, on average, than enclosed shopping centres, particularly in regional locations.
- There is a lack of higher order retail facilities within the LGA and there is likely to be significant escape expenditure to surrounding higher order retail facilities provided in Lismore and Ballina. This would include expenditure on fashion, leisure, dds and household goods/bulky goods retailing.
- While the LGA does not support a full range of retail formats and centre types, the community appears to be reasonably well serviced in relation to convenience related retail facilities. Future growth in the residential population is expected to be low-moderate, growing by 0.5% per annum to 2031 (a net increase of 10.7% or 2,400 persons).
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 6,500 sq.m (a 15% uplift) by 2031, equating to a land requirement of about 2.2 hectares.
- Existing retail demand is estimated at 45,200 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 925,939 sq.m.

- Because the retail offer in Casino is relatively small, we estimate leakage of about 20% beyond the LGA to centres such as Lismore, resulting in net demand of about 33,900 sq.m, increasing to 38,800 sq.m by 2031.
- Our preliminary analysis indicates that the existing land stock will be **sufficient to support the future retail demand growth across the LGA.**
- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 9: LGA Analysis – Clarence Valley LGA

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Clarence Valley LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Clarence Valley LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Clarence Valley LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from Clarence Valley Council.

### 9.1 Key facts, findings and take-outs

#### 9.1.1 Population growth

- Between 2006 and 2011, the resident population of Clarence Valley LGA expanded by 2,138 persons.
- As at 2011, approximately 44% of the resident population was aged 50+.
- The number of 0-19 and 35-49 residents contracted over the five year period.

- Over the five years to 2011, net migration into the Clarence Valley LGA totalled 1,594 persons, mostly coming from regional NSW (predominantly from Newcastle and the Hunter region).
- DPE projections indicate the rate of population growth will ease to 0.5% per annum out to 2031. With the exception of the 65+ persons, all age cohorts are expected to incur outright reductions – the largest in the 50-64 age group.

### 9.1.2 Employment trends

- As at 2011, the Clarence Valley LGA supported 15,539 jobs, accounting for around 9% of the North Coast workforce.
- The two largest employing industries are Health Care and Social Assistance (15.0%) and Retail Trade (4.2%). Notably, the top four employing industries accounted for 48% of the LGA's workforce.
- Around 83.7% of Clarence Valley's working residents also work in the LGA.
- Between 2006 and 2011, the Clarence Valley LGA's workforce increased by 390 jobs.
- There is an overt relationship between employment and service related industries in the Clarence Valley LGA.

### 9.1.3 Employment land

- In Clarence Valley LGA, there are 1,402 hectares of land zoned for urban employment purposes – comprising of 15% Business, 55% Industrial and 30% Special Uses.
- Following 114 jobs additions over the 2006 and 2011, the Clarence Valley LGA workforce is expected to expand by 1,325 jobs over the forecast period (i.e. 2011 to 2031).
- A larger workforce is anticipated to result in greater demand for commercial, industrial and special use premises (e.g. hospitals, education establishments, etc.) premises. Our estimates of demand indicate **23,210–30,940 sq.m of**

**commercial, 26,838 sq.m of retail, 50,240–66,970 sq.m of industrial and 22,930–30,570 sq.m of special use** floorspace will be required by 2031.

- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **2.3–3.1 hectares of commercial, 5.4 hectares of retail, 8.4–11.2 hectares of industrial and 2.9–3.8 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available to accommodate future employment needs over the forecast period. More specifically, it is estimated over the forecast period:
  - *Supply of business land will exceed demand by 23.5 hectares*
  - *Supply of industrial land will exceed demand by 225.5 hectares*
  - *Supply of special uses land will exceed demand by 153.7 hectares*
- Constraints such as topography and the cost of providing services (i.e. utilities, roads and upgrades) could reduce the quantum of land available for future development in Clarence Valley LGA.
- Additionally, the location of zoned land may not be consistent with market need, which would also reduce the amount of land available for future expansion.

## 9.2 Literature review

There are several local Council plans and policies of relevance across the Clarence Valley Council Area. The key documents of relevance are the South Grafton Heights Precinct Strategy 2007 (amended in 2011); the Maclean Urban Catchment Local Growth Management Strategy 2011 (MUCLGMS); the Clarence Valley Industrial Lands Strategy 2007; the Lower Clarence Retail Strategy 2007; the Clarence Valley Economic Development Strategic Plan 2006 (EDSP); the Yamba Retail/Commercial Strategy 2002 and the Clarence Valley Settlement Strategy 1999.



We note the following key points from these documents:

- Grafton is identified as a major regional centre in the region in the MNCRS, and provides higher order retail, administrative, civic, health and entertainment facilities.
- The South Grafton Heights Precinct Strategy confines commercial development to the area bounded by Ryan Street, Bent Street, Cowan Street and the Clarence River. Furthermore, South Grafton is to accommodate industrial development to provide for settlements south of the Clarence River.
- The Maclean LGMS indicated that small retail nodes could be supported at Gulmarrad and Townsend over the next 10 years (i.e. around 2017), as these areas support future residential growth.
- The MUCLGMS relies on infill development in Maclean, with Townsend to provide for main industrial employment land opportunities.
- The LGMS identifies that the Maclean interchange and Pacific Highway upgrade would negate needs to upgrade existing roads and intersections within the town.
- The Lower Clarence Retail Strategy (LCRS) was prepared in 2007 by AEC Group and focussed specifically on the town of Maclean. The study indicated that there was about 12,000 sq.m of retail floorspace and 13,000 – 14,000 sq.m of other non-retail uses in the town centre – including commercial offices, professional services, entertainment, and leisure uses, car sales and auto repairs facilities.
- The LCRS indicated that there would be demand for a further 3,400 to 8,500 sq.m of retail floorspace in the town centre over the subsequent 10 years to 2017, including additional supermarket and convenience retail facilities. The LCRS encourages further retail development within the town centre, to strengthen Maclean's retail position.
- The LCRS identified the future growth of the Maclean town centre should be carried out within the context of the following retail hierarchy:

- Maclean – District Centre.
  - Yamba – Town.
  - Townsend, Gulmarrad and Iluka – Village.
- The Clarence Valley Industrial Lands Strategy identifies that while there appears to be sufficient vacant industrial lands; most of this is constrained or unsuitable for development.
- The Industrial strategy identifies demand for a transport and freight hub, marine industry cluster, further heavy industry associated with primary production (such as timber) and light/general industry areas to service population growth. The Grafton airport land is identified as a long term strategic area to support industrial development including transport and freight hubs.
- The Industrial strategy also identifies opportunity for expansion within the Lower Clarence near the river and existing industrial land for marine industry.
- New release lands should be concentrated around existing industrial nodes and supply.
- The Clarence Valley EDSP outlines the following strategies to support economic growth: creative industry development, geographical marine industry clustering, focus on education and experience based tourism industry, support the soy bean industry, develop a transport hub within Clarence Valley to capitalise on road and rail infrastructure, increased use of the Regional Livestock selling centre in Grafton, development of infrastructure to support tourism and sporting excellence, mitigate the highway bypass impacts and investigate future options for development of the Clarence Valley Regional Airport.
- The Yamba Retail/Commercial Strategy was prepared, and adopted in 2002. This strategy indicated that there was sufficient business zoned land within Yamba to support growth over the next 10 years. The strategy indicated that no new business zoned land would need to be provided, except potentially to service a proposed new growth area at West Yamba. However, the strategy

indicated that minor extensions adjacent to existing business zoned land could be supported, subject to assessment.

- The Yamba CBD and Treelands Drive Commercial Centre should continue to function as the two main retail and commercial centres of Yamba – with slightly different roles.
- The Clarence Valley Settlement strategy provided a vision to 2016 and focused growth in Grafton and Maclean (including Yamba, Junction Hill village, Clarenza and Waterview Heights). It recognises Yamba as a key tourist centre with riverport capabilities, Maclean as a district centre for secondary services, commercial and industrial land and Junction Hill for future industrial lands.

### 9.3 Socio-demographic trends

#### 9.3.1 Population change

- According to ABS ERP figures, Clarence Valley's population grew by 2,138 persons over the five years to 2011, resulting in a total population of 51,287 persons.
- This increase equates to an average annual increase of 428 persons.

**Table 9.1**

**Estimated Resident Population (persons) - Clarence Valley LGA**

Year	Estimated Resident Population	Total Change (persons)
2001	48,247	
2006	49,149	902
2011	51,287	2,138

*Source: ABS*

- As at 2011, 25% of the resident population was aged 0-19 years and 44% above 50 years.

- Consistent with national trends, the number of 50+ persons increased considerably over the five year period (+1,259 persons), with 65+ residents expanding by 1,526 persons.
- Outright declines were observed in other age cohorts, with the 0-19 age cohort contracting by 165 persons, while the 35-49 year group experienced a reduction of 770 persons.

**Table 9.2**  
Population By Age (persons) - Clarence LGA

Age cohort	2006	2011	Change 2006-2011	Composition 2011
0-19	13,051	12,886	-165	25%
20-34	6,270	6,558	288	13%
35-49	10,058	9,288	-770	18%
50-64	10,475	11,734	1,259	23%
65+	9,295	10,821	1,526	21%
<b>Total</b>	<b>49,149</b>	<b>51,287</b>	<b>2,138</b>	<b>100%</b>

- Given the pronounced skew to older age cohorts, population growth in working aged residents will be vital to supplement the retirement of the workforce, as well as provide essential services to an older local population.

### 9.3.2 Migration movements

After assessing 2006 and 2011 Census data, inward and outward movements for the Clarence Valley LGA have been evidenced (place of usual residence).

- Over the five years to 2011, net migration into Clarence Valley LGA totalled 1,594 persons.
- Regional NSW (predominantly Newcastle and the Hunter region) represented the largest source location (+756 persons), with the majority of migrants being of working age.

- Conversely, 'interstate' represented the most popular destination for residents who had previously lived in the Clarence Valley LGA (-104 persons).
- By age, the dominant net inflow was from persons aged 50-64 (+836 persons), mainly from Greater Sydney.
- Similar to other North Coast LGAs, there was an overall net loss in young working adults (20-34 years).

**Table 9.3**  
Net Migration by Age - Clarence Valley LGA

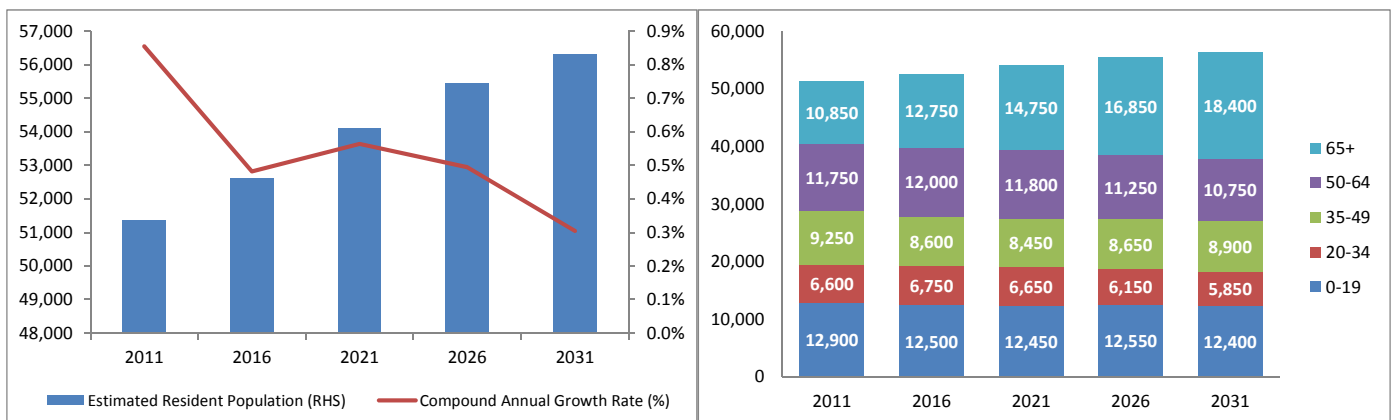
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	14	-14	39	8	-62	-15
Sydney	90	-68	175	251	93	541
Regional NSW	124	122	260	187	63	756
Interstate	8	-732	113	333	174	-104
Overseas	83	133	115	57	28	416
<b>Total Net Migration</b>	<b>319</b>	<b>-559</b>	<b>702</b>	<b>836</b>	<b>296</b>	<b>1,594</b>

Source: ABS

### 9.3.3 Population projections

- According to new DP&E projections, the Clarence Valley LGA population is projected to expand to 56,250 by 2031.

**Figure 1. Projected Population and population by age (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- Over the forecast period, population growth is projected to be most pronounced amongst 65+ persons. Between 2011 and 2031, this cohort is projected to expand by 7,550 persons (growth of 378 persons per annum).
- Growth in all other age cohorts is projected to be negative, with the greatest net reduction anticipated for the 50-64 age group.

#### 9.3.4 Labour force status

- Of all residents in Clarence Valley LGA, around 81% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 50% i.e. 19,499 of 38,630 residents.
- Of residents in labour force, 91% were employed and 9% unemployed (and seeking working) as at Census night (2011).
- The employment rate in Clarence Valley LGA was marginally lower than in the North Coast region (92%).

**Table 9.4**

**Labour Force Status by Age (number) - Clarence Valley LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	1,289	303	1,592	1,467	3,059
20 - 29	2,300	401	2,701	1,071	3,772
30 - 39	3,088	306	3,394	1,153	4,547
40 - 49	4,317	317	4,634	1,449	6,083
50 - 59	4,687	276	4,963	2,490	7,453
60 - 69	1,789	125	1,914	4,993	6,907
70 - 79	243	9	252	4,026	4,278
80 - 84	33	0	33	1,354	1,387
85+	16	0	16	1,128	1,144
<b>Total</b>	<b>17,762</b>	<b>1,737</b>	<b>19,499</b>	<b>19,131</b>	<b>38,630</b>

Source: Census of Population and Housing (2011)

### 9.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are employed within the boundaries of the Clarence Valley LGA.
- In the Clarence Valley LGA, around 83.7% of its working residents also worked in the LGA.
- The remaining 16.3% of working residents travel either to other North Coast LGAs (3.6%) or locations outside the North Coast (12.7%) for work.
- The outflow of working residents to other North Coast LGAs is low relative to other LGAs, as reflected by a high rate of internal containment (83.7%)
- Of working residents who travel to other North Coast LGA, the most popular workplace destination was Coffs Harbour LGA (2.2%), followed by Lismore (0.4%).

**Table 9.5**

**Job Containment - Clarence Valley LGA**

	<b>Value</b>
Working residents	17,557
<u>Place of Work (number)</u>	
Clarence Valley	14,688
North Coast LGAs (ex. Clarence Valley)	632
Outside North Coast	2,237
<b>Total</b>	<b>17,557</b>
<u>Job Containment (%)</u>	
Clarence Valley	83.7%
North Coast LGAs	3.6%
Other	12.7%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Job containment rates in each industry classification for the Clarence Valley LGA are presented in the next table.

- Relative to the all industries average for the Clarence Valley LGA (83.7%), eleven industries achieved a higher rate of job containment.
- Of all industries, Rental, Hiring and Real Estate Services (91.8%), Retail Trade (91.3%) and Accommodation and Food Services (91.1%) achieved the highest rate of job containment in 2011.
- Notably, job containment for Health Care and Social Assistance exceeded the all industries average (for Clarence Valley LGA) – one of few LGAs in the North Coast to achieve this.

**Table 9.6**  
Job Containment by Industry - Clarence Valley LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	91.8%	4.1%	4.1%	100.0%
Retail Trade	91.3%	2.5%	6.1%	100.0%
Accommodation and Food Services	91.1%	2.5%	6.4%	100.0%
Other Services	90.2%	3.3%	6.5%	100.0%
Education and Training	90.1%	3.2%	6.7%	100.0%
Health Care and Social Assistance	89.9%	3.9%	6.2%	100.0%
Financial and Insurance Services	87.8%	3.1%	9.0%	100.0%
Public Administration and Safety	87.0%	4.4%	8.7%	100.0%
Electricity, Gas, Water and Waste Services	86.3%	2.8%	10.9%	100.0%
Professional, Scientific and Technical Services	86.2%	4.2%	9.6%	100.0%
Wholesale Trade	85.7%	5.1%	9.3%	100.0%
<b>Across all industries</b>	<b>83.7%</b>	<b>3.6%</b>	<b>12.7%</b>	<b>100.0%</b>
Manufacturing	83.5%	2.4%	14.1%	100.0%
Information Media and Telecommunications	82.4%	3.6%	13.9%	100.0%
Arts and Recreation Services	76.4%	3.4%	20.2%	100.0%
Agriculture, Forestry and Fishing	75.6%	6.0%	18.4%	100.0%
Transport, Postal and Warehousing	72.1%	5.0%	22.9%	100.0%
Administrative and Support Services	68.3%	3.5%	28.2%	100.0%
Construction	59.3%	4.1%	36.7%	100.0%
Mining	20.4%	5.1%	74.5%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 9.4 Employment and labour market trends

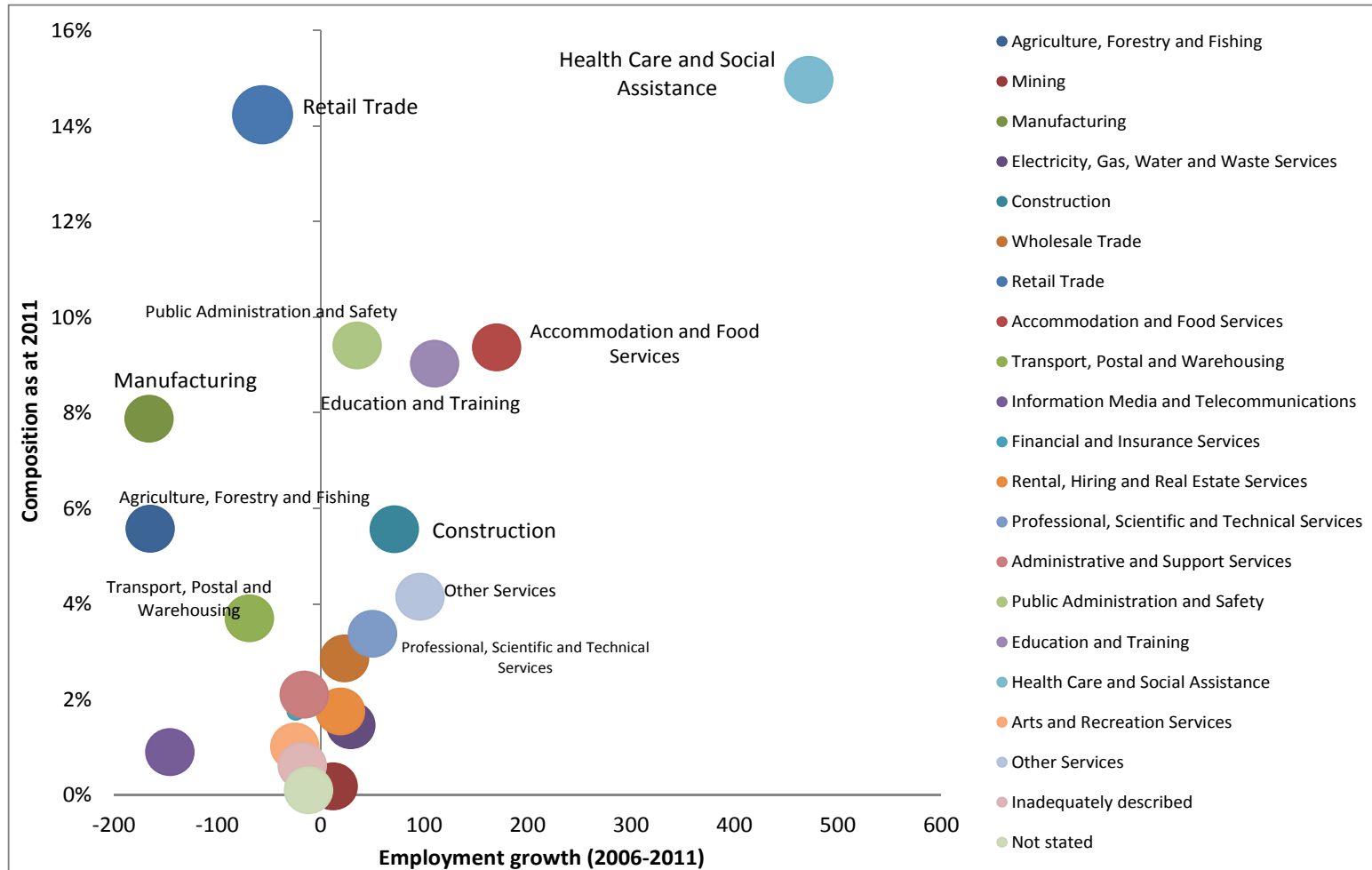
### 9.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Clarence Valley LGA and identify key emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.



- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Clarence Valley LGA supported 15,539 jobs, accounting for around 9% of total jobs in the North Coast region.
- As at 2011, the top four employing industries in the Clarence Valley LGA accounted for 48% of total jobs – Health Care and Social Assistance (15.0%), Retail trade (14.2%), Public Administration and Safety (9.4%) and Accommodation & Food Services (9.4%).
- The profile of employment is on par with the broader North Coast region; however, representation within service industries (47.6%) is lower than the average observed for the North Coast region (50.3%).
- Notably, the Clarence Valley LGA had a higher representation of workers engaged within a white collar capacity – largely the result of higher proportion of workers within the Public Administration and Safety industry.
- Over the five years to 2011, the number of employed persons within the Clarence Valley LGA increased by 390.
- Consistent with other LGAs in the North Coast, the majority of job additions occurred in industries which serve local residents - Health Care and Social Assistance (+472 jobs), Accommodation and Food Services (+170 jobs) and Education and Training (+110 jobs).
- Job losses were observed in the Manufacturing (-166 jobs), Agriculture, Forestry and Fishing (-165 jobs) and the Information Media and Telecommunications (-146 jobs) industries.
- We note that planned and ongoing road infrastructure investment in the area (continued improvements to the Pacific Highway and other local bridges) is likely to provide a temporary employment boost in the construction industry. This investment in infrastructure is likely to generate demand for additional employment land.

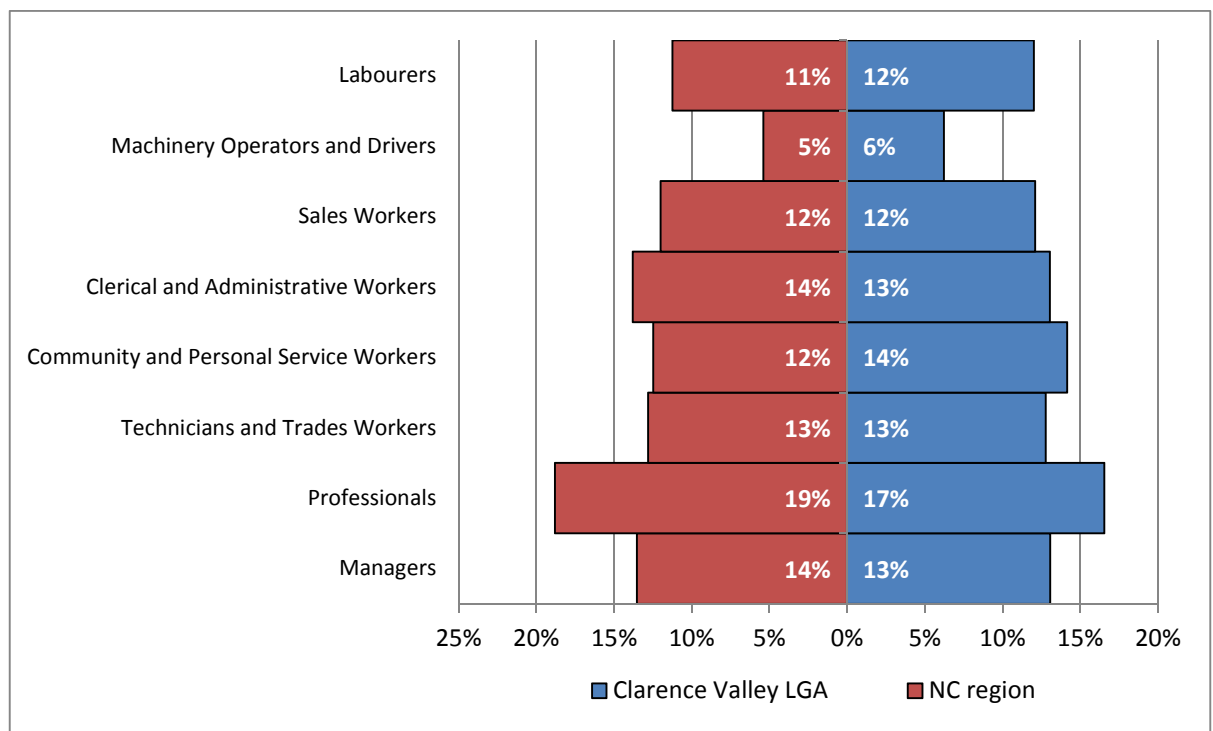
Figure 2. Employment composition and growth by industry, Clarence Valley LGA



### 9.4.2 Occupation profile

- As at Census 2011, approximately 17% of Clarence Valley LGA's workforce was employed within a 'Professional' capacity.
- The next two largest representative occupation types were Community and Personal Service Workers (14%), followed by Clerical and Administrative Workers (13%).
- Compared to the North Coast, representation amongst Professionals and Managers was slightly lower in the Clarence Valley LGA. However, the proportion of workers engaged in Community and Personal Service was higher.

**Figure 3. Occupation Composition (2011)**

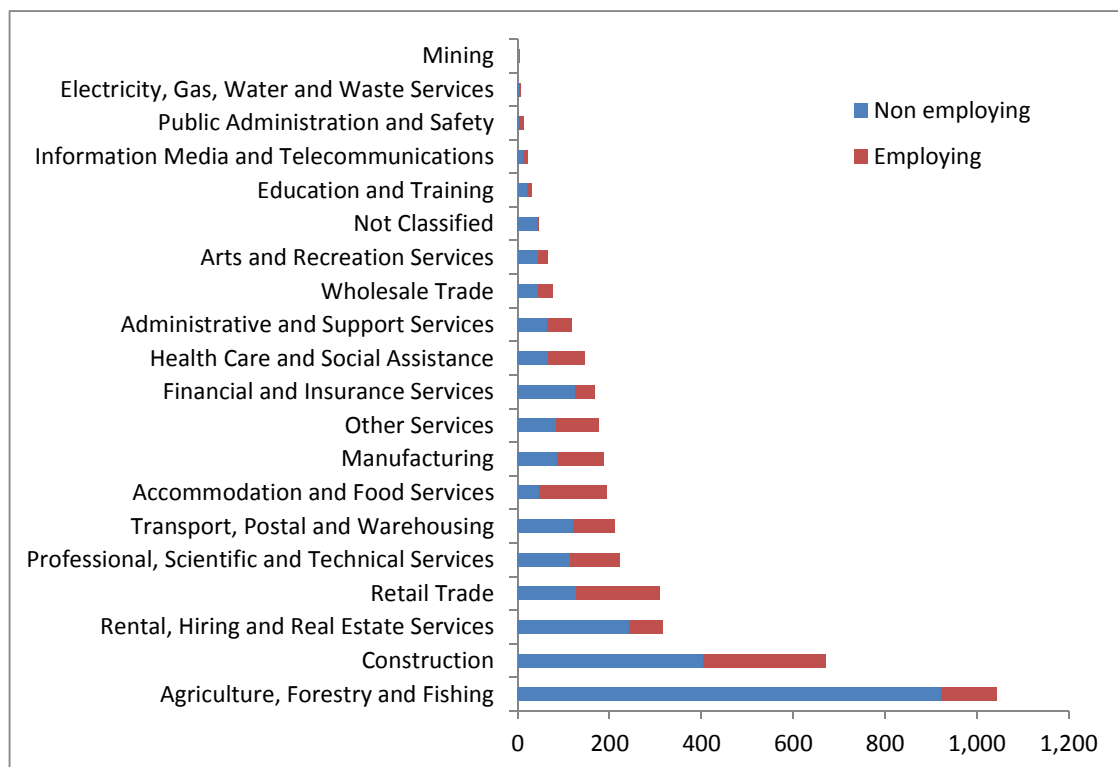


Source: ABS, MacroPlan Dimasi

### 9.4.3 Business composition & change

- As at June 2011, there were 4,028 businesses operating within the Clarence Valley LGA, with 64% being non employing/sole trading businesses.
- While it only supports 5.6% of total jobs within the LGA, businesses in the Agriculture, Forestry and Fishing industry account for the lion's share of existing businesses (1,043 in total).
- Of employing businesses, Construction represents the largest business type with 266 businesses - 194 of these businesses employed between 1 and 4 workers.
- At June 2011, there were six businesses employing 200 or more persons within the Clarence Valley LGA; three in the Construction and Rental, Hiring and Real Estate Services industries respectively.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, business growth within the Clarence Valley LGA was negative, with the business count reducing by eight – majority of the losses occurred amongst employing businesses.
- By industry, Financial and Insurance Services (+27) and Rental, Hiring and Real Estate Services (+23) businesses incurred the largest expansion.
- Conversely, a significant contraction was incurred in Retail Trade (-31) , Agriculture, Forestry and Fishing (-21) and Construction (-20).

**Table 9.7**  
Business Composition and Change - Clarence Valley LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	1	-1	0
Retail Trade	-8	-23	-31
Accommodation and Food Services	-9	-1	-10
Education and Training	1	-3	-2
Construction	-11	-9	-20
Public Administration and Safety	0	9	9
Manufacturing	-1	-5	-6
Professional, Scientific and Technical Services	3	-1	2
Other Services	-6	5	-1
Transport, Postal and Warehousing	-1	-2	-3
Agriculture, Forestry and Fishing	-14	-7	-21
Administrative and Support Services	10	11	21
Wholesale Trade	6	-15	-9
Rental, Hiring and Real Estate Services	10	13	23
Financial and Insurance Services	21	6	27
Arts and Recreation Services	6	3	9
Electricity, Gas, Water and Waste Services	0	-3	-3
Information Media and Telecommunications	5	3	8
Mining	-6	-6	-12
Not Classified	14	-3	11
<b>Total</b>	<b>21</b>	<b>-29</b>	<b>-8</b>

Source: ABS

#### 9.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- As at 2011, 44% of Clarence Valley's population was aged 50 or above. As a consequence, it is likely that the rate of retirement in the local workforce will be high over the next 20 years (due to high containment). To supplement this,

job opportunities for younger residents should be encouraged to supplement and minimise the anticipated labour shortage.

- At the same time, the ageing population is expected to result in greater demand for medical services over the forecast period – supporting jobs growth in Health Care and Social Assistance.
- More recently, there has been solid growth in skilled workers within Clarence Valley, evidenced by growth in Professional, Scientific and Technical Services and Public Administration and Safety.

## 9.5 Employment Land Supply

### 9.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Clarence Valley LGA.
- The information presented in this supply section is based on the Clarence Valley Local Environmental Plan 2011.
- Three main employment land use categories are used in the Clarence Valley LGA i.e. Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

<b>Classification</b>	<b>Land Use Zone</b>	<b>Area (ha)</b>	<b>%</b>
Business	B1. Neighbourhood Centre	22.8	2%
	B2. Local Centre	30.0	3%
	B3. Commercial Core	59.9	6%
	B5. Business Development	44.6	4%
	<b>Total</b>	<b>157.2</b>	<b>15%</b>
Industrial	IN1. General Industrial	539.3	52%
	IN4. Working waterfront	31.1	3%
	<b>Total</b>	<b>570.4</b>	<b>55%</b>
Special Uses	SP2. Infrastructure	196.2	19%
	SP3. Tourist	108.4	11%
	<b>Total</b>	<b>304.6</b>	<b>30%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>1,032.2</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- At present, the Clarence Valley LGA has 1,032.2 hectares of zoned urban employment land.
- Representing the largest allocation, it is estimated approximately 55% of this land is zoned for industrial uses, 30% for Special Uses and about 15% for Business.

Within the four designated business zones (B1, B2, B3, and B5), there is around 59.9 hectares zoned to B3 Commercial Core and 44.6 hectares to B5 Business Development. Combined, there is 52.8 hectares assigned to B1 Neighbour Centre and B2 Local Centre.



# Map 9.1













## Clarence Valley Council

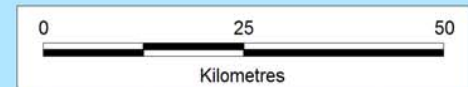
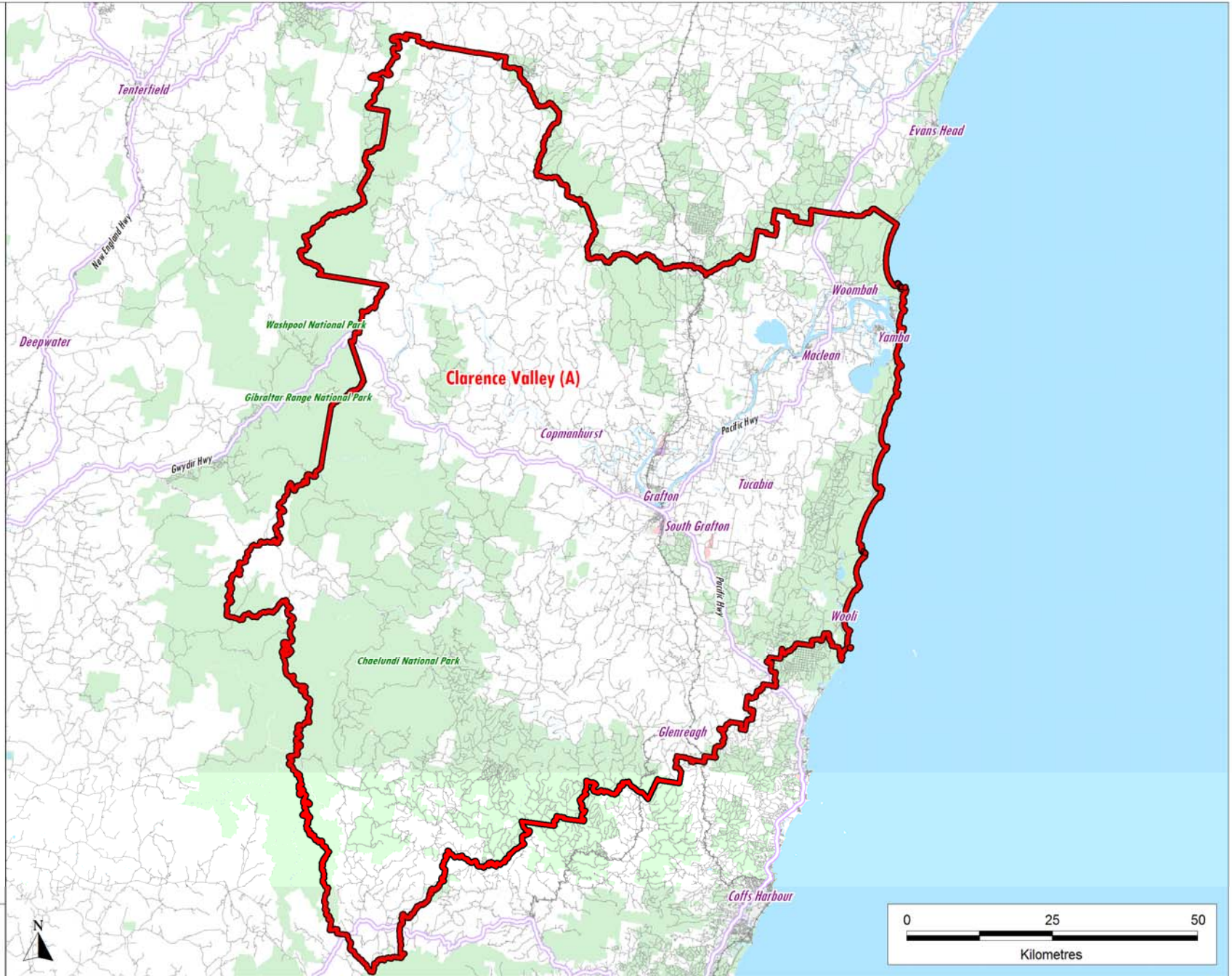
### Employment Land Zones

#### Legend \*

 Clarence Valley Council Boundary

#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts

















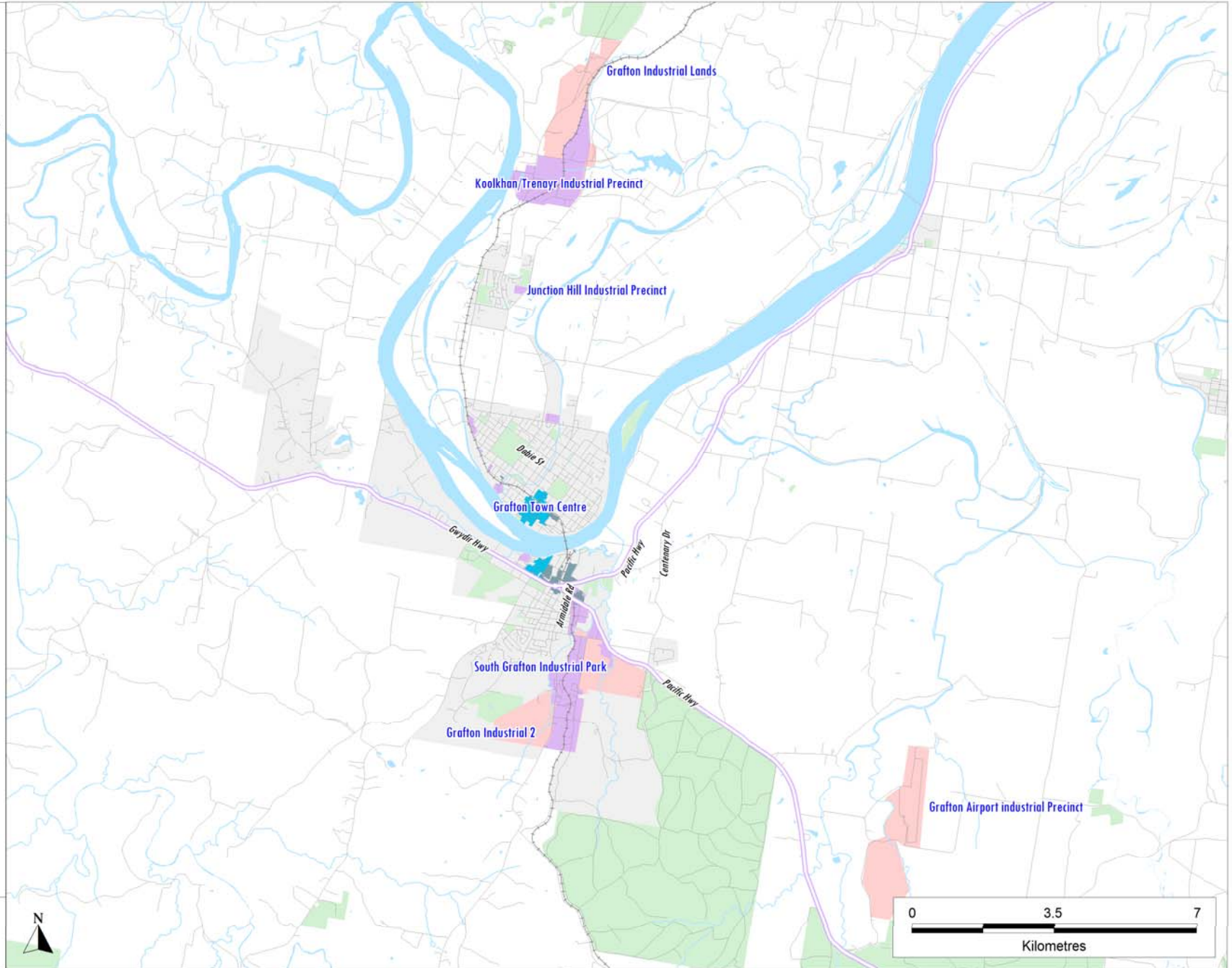
# Map 9.2

## Grafton Employment Land Zones

### Legend \*

#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



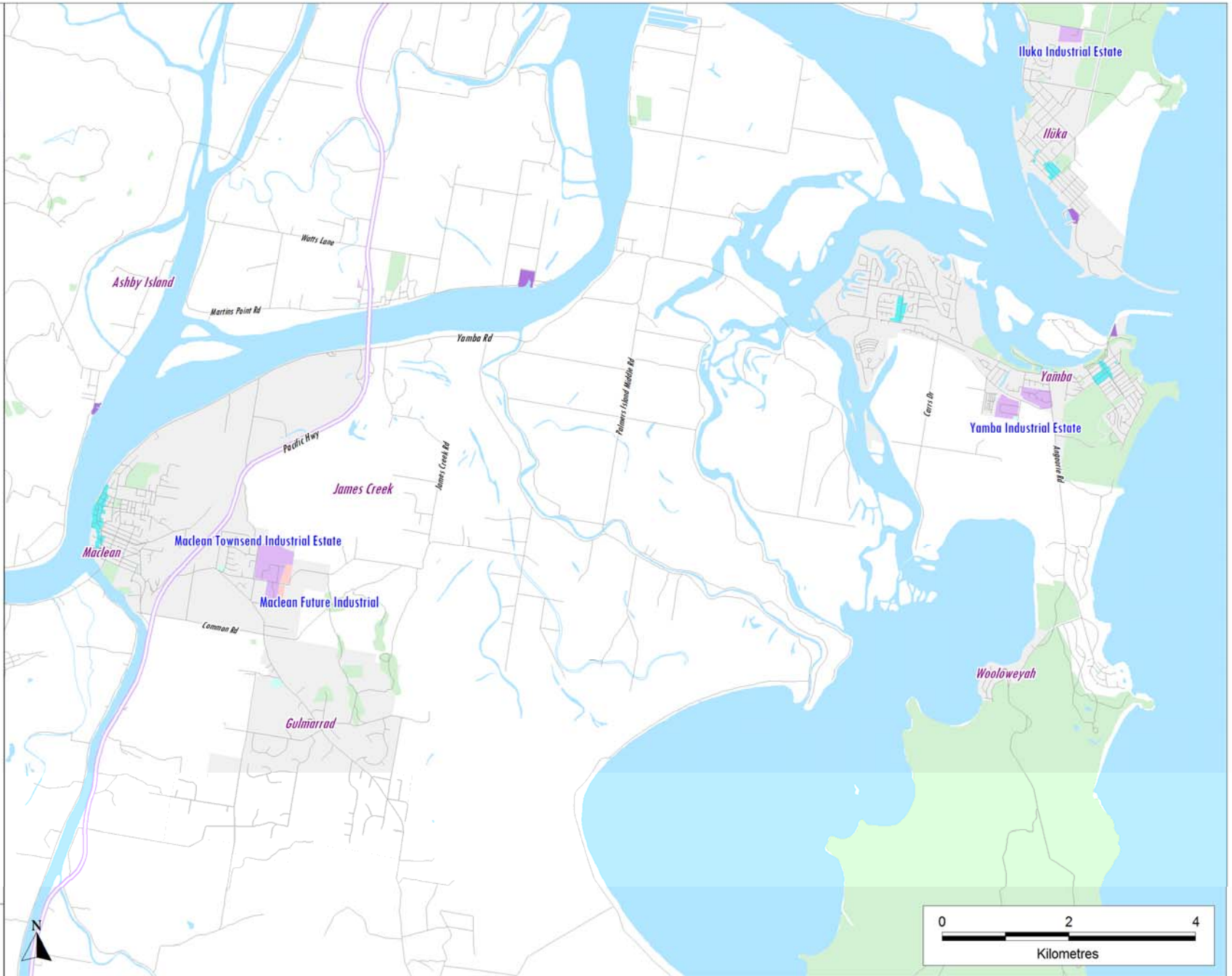
# Map 9.3

## Yamba & Maclean Planning Zones

### Legend \*

#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precinct



### 9.5.2 Industrial – Existing supply

- In the Clarence Valley LGA, two industrial land use zones are used i.e. IN1 General Industrial and IN4 Working Waterfront.
- As presented below, seven existing precincts were identified in the Clarence Valley LGA.

**Table 9.9**  
Established Industrial Precincts

Name	Area (hectares)	Developed (hectares)	Developed (%)
South Grafton Industrial Park	185.5	149.7	81%
Koolkhan-Trenayr Industrial Estate	181.3	138.6	76%
Maclean-Townsend Industrial Estate	18.6	10.4	56%
Yamba Industrial Estate	18.1	10.3	57%
Grafton Industrial lands	15.8	14.9	94%
Illuka Industrial Estate	6.9	2.6	38%
Junction Hill Industrial Precinct	1.0	0.8	80%
Harwood Industrial Estate	0.7	0.7	100%
<b>Total</b>	<b>427.9</b>	<b>328</b>	<b>77%</b>

Source: MacroPlan Dimasi

Key findings pertinent to our investigation include:

- Existing precincts occupy approximately 426.9 hectares of zoned industrial land.
- There are two significant industrial estates; the South Grafton Industrial Park (185.5 hectares) and the Koolkhan-Trenayr Industrial Estate (181.3 hectares).
- The **South Grafton Industrial Park** (which includes the Iolanthe Street Industrial Precinct) is located on the southern side of the Clarence River. The precinct is around 1-5 km from the Pacific Highway, 3km from rail infrastructure and 3km from the Grafton Central Business District.
- Existing uses at the South Grafton Industrial Park include a saw mill and associated product manufacturing, meat sale yards, a functioning brickwork

site, as well as freight forwarding companies and other smaller service industries.

- The **Koolkhan-Trenayr Industrial Estate** is located to the north of Grafton, on Summerland Way. Through Summerland Way, which is the major transport link for Lismore/Casino (to the north) and (Grafton to the south), the precinct is well connected to major arterial road infrastructure.
- Existing uses at this precinct include three large scale timber processing operations and a timber log preservation plant. Other uses comprise engineering works, concrete products manufacture, earthmoving contractors, foundry, vehicle smash repair, nursery, tile display and sales, vehicle wreckers, mini storage and Council depot.
- Of the total, it is estimated that around 327.2 hectares or 77% of this land is developed. Assuming there are no constraints, it is estimated there is approximately 98 hectares of zoned land available for future development.
- However, Clarence Valley Council has informed MacroPlan Dimasi that the South Grafton Industrial Park and the Koolkhan-Trenayr Industrial Estate lands are subject to development constraints. Of total undeveloped area (35.8 and 42.7 hectares respectively), there is approximately 18.25 and 28.8 hectares, respectively of unconstrained land.
- As such, there is approximately **68 hectares of zoned industrial land available for future development.**
- At an average floor space ratio of 0.6:1, this equates to approximately 41.0 hectares of industrial floorspace.

### 9.5.3 Industrial – Future supply

- The Industrial Lands Strategy identifies three new potential industrial precincts for the Clarence Valley LGA. In all, it is estimated these future precincts could deliver up to 140 hectares of industrial land.
- The four precincts identified are summarised in the next table.

Table 9.10

## Future Industrial Precincts - Clarence Valley LGA

Precinct	Land Area (Hectares)	Timing (Years)
Grafton Industrial Lands	50.0	1 - 5
Grafton Airport Industrial Precinct	9.0	1 - 5
Maclea-Townsend Industrial Estate	17.0	5 - 10
South Grafton Industrial Park	91.0	10 - 20
<b>Total</b>	<b>167.0</b>	

\* Includes MNCRS land which is not presently zoned - 35ha of 185ha deemed developable

Source: Mid North Coast Regional Strategy

- The **South Grafton Industrial Area** is to be expanded over the next 10–20 years. The site will be located to the east of the existing precinct, and encompasses approximately 119 ha of land between Swallow Road, Tyson Street and the Pacific Highway. Of the total allocation, it is understood 91 hectares is unconstrained.
- Moreover, Clarence Valley Council has approved a planning proposal for a 16 hectare Marine Industrial Precinct in Harwood, which is to be zoned IN4 Working Waterfront.
- Vacant land at the proposed expansion of the **Maclea–Townsend Industrial Estate** is available for development over the next decade.

#### 9.5.4 Retail & Commercial – Existing supply

The Clarence Valley LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 9.3 and Map 9.4.

- The Clarence Valley LGA centres hierarchy generally consists of the following structure:
  - Grafton Major Regional Centre.
  - Maclea Town Centre and Yamba Town Centre.
  - Smaller scale coastal and inland villages (such as Lawrence, Coutts Crossing, Ulmarra, Iluka and Glenreagh etc.).



### **Grafton Major Regional Centre**

- The Grafton Major Regional Centre is the primary retail and commercial activity centre in the Clarence Valley LGA, located on the Pacific Highway. The centre occupies around 105.7 ha of business zoned land (on both sides of the Clarence River, including 1.3 ha of B1 zoned land, 59.9 ha of B3 zoned land and 44.6 ha of B5 zoned land.
- The main part of the regional centre (north of the river) includes Coles, Woolworths and Aldi supermarkets, enclosed shopping facilities such as Grafton Shoppingworld (which contains Big W and Target discount department stores) and Grafton Mall, as well as a sizeable provision of street/strip retailing, primarily oriented around Summerland Way, Fitzroy Street and Pound Street. The centre includes the Clarence Valley Council offices, as well as a range of business, medical, and community services.
- On the southern side of the river are a range of light industrial, convenience retail and bulky goods facilities including a Bunnings Warehouse and Super Cheap Auto, as well as Coles Grafton South.

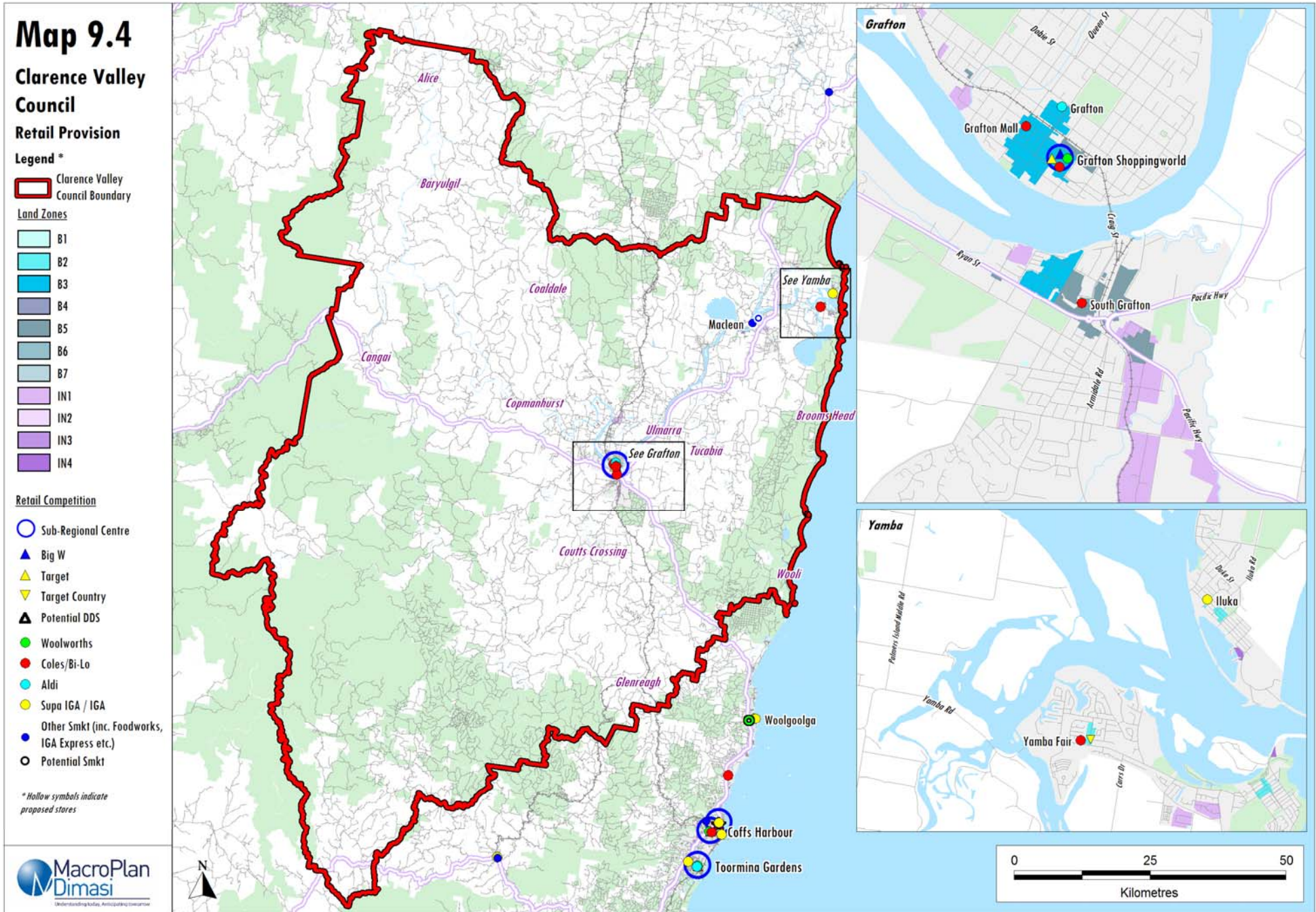
### **Town Centres**

- The Yamba Town Centre is located between Woolli Street and Beach Street, primarily located along Yamba Street. The town centre provides approximately 5,000 – 6,000 sq.m of retail floorspace, and includes a typical provision of retail floorspace including pharmacies, a newsagency, a discount variety store, food retailers including a butcher, bakery and fruit and vegetable store, as well as a range of retail services including hairdressers and an optometrist. The town centre also provides a range of non-retail services including banks, Australia Post and real estate agencies. The major enclosed shopping centre is located approximately 4 km west of the town centre, namely Yamba Fair, anchored by a Target Country discount department store and a Coles supermarket, providing approximately 7,000 sq.m of retail floorspace. In total, the Yamba Town Centre, including Yamba Shopping fair and other surrounding retail, is estimated to provide approximately 12,000 – 14,000 sq.m of retail floorspace.

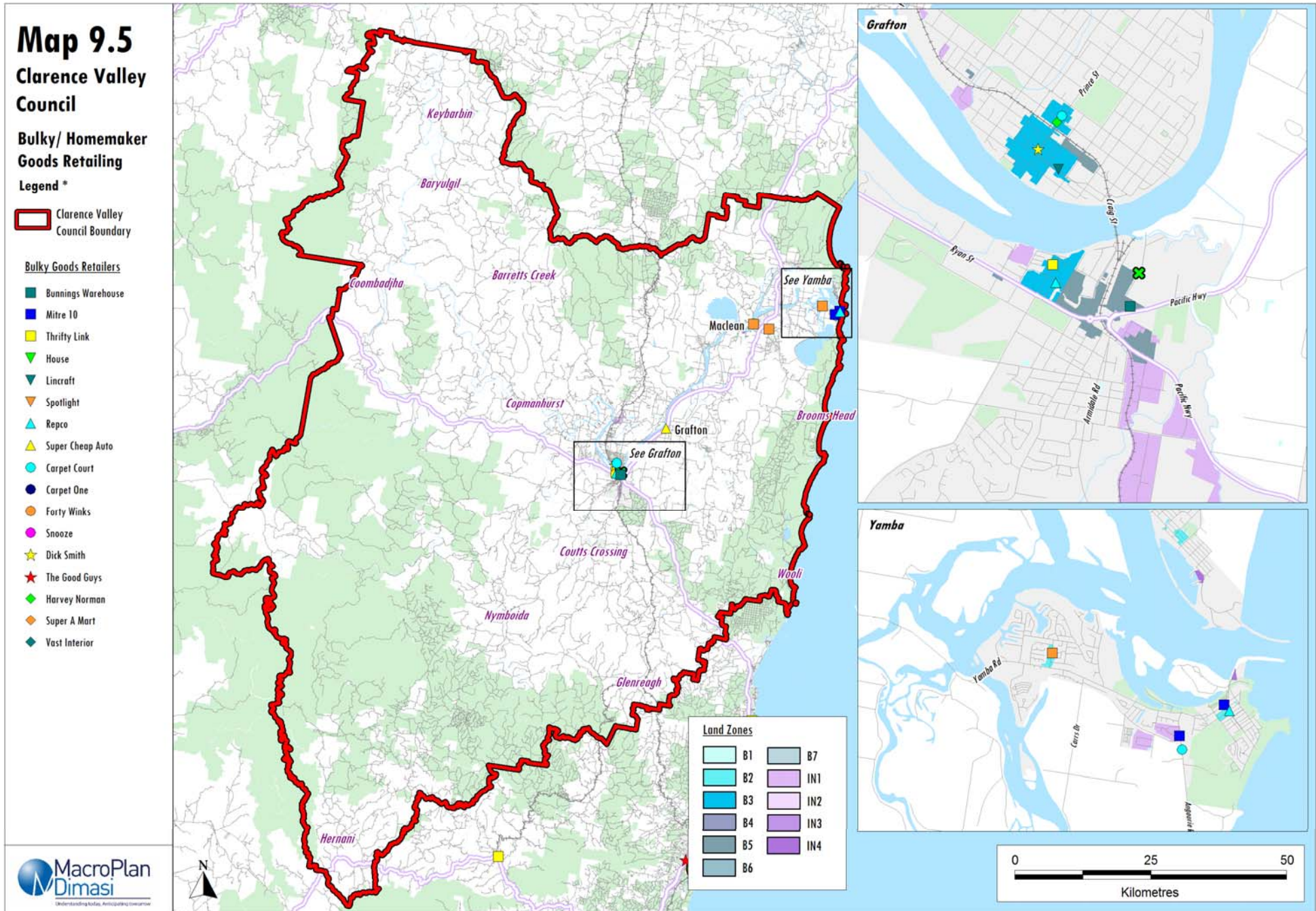
- The Maclean Town centre is located adjacent to the Clarence River, west of the Pacific Highway and includes 13.2 ha of B2 zoned land. This town centre includes around 25,000 sq.m of convenience oriented retail and commercial services (source: MUCLGMS). There are no large supermarket facilities in the town centre, only a small Spar supermarket.

#### **Other centres/villages**

There are several smaller local/neighbourhood centres/villages, located elsewhere across the LGA which, generally provide a very limited range of retail and commercial facilities, serving the convenience needs of local residents, localised tourism populations or passing traffic. There are two small village zones, as yet undeveloped, located at Junction Hill (B2 Neighbourhood Centre – 1.0 ha) and Gulmarrad (B1 Local Centre – 1.9 ha).







### **Business zoned land capacity for retail and commercial floorspace**

Table 9.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **157.2 hectares of business zoned land** within the Clarence Valley LGA, of which 22.8 ha is B1 zoned land, 30 ha is B2 zoned land and 59.9 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is about 44.6 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts.
- We have applied FSRs for each business zone type based on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail floorspace capacity of existing business zones in the Clarence Valley LGA to be in the order of 2,487,832 sq.m and the total floorspace capacity for commercial and other uses to be in the order of 426,000 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 15%, given the relative size and mix of the retail offer compared with nearby Coffs Harbour. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 9.11**  
Clarence Valley LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1*	22.8	0.9	198,326
Total B2*	30.0	1.2	345,178
Total B3*	59.9	2.4	1,436,402
Total B5*	<u>44.6</u>	<u>1.1</u>	<u>507,926</u>
<b>Total LGA</b>	<b>157.2</b>		<b>2,487,832</b>
*NSW North Coast region average for zone type Source: MapInfo; NSW Govt; MacroPlan Dimasi			

### 9.5.5 Retail & Commercial – Future supply

There is one proposed retail development within the Clarence Valley LGA, an IGA is proposed at Maclean, the site is currently for sale with development approval and will include a 2,000 sq.m IGA supermarket and parking for 100 cars.

### 9.5.6 Special Uses – Existing supply

- The Clarence Valley LEP 2011 identified three ‘Special Use’ zones; SP1 Special Activities, SP2 Infrastructure and SP3 Tourist.
- Within ‘Special Uses’, cemeteries, local classified roads, water storage facilities and some other miscellaneous uses have been excluded from our employment land calculations, as employment (if any) in these tend to be negligible.
- Significantly, SP2 Infrastructure category includes 142 hectares for an air transport facility (i.e. Clarence Valley Regional Airport), 23 hectares for educational establishments (i.e. North Coast TAFE), 11 hectares for health service facilities (i.e. Grafton Base Hospital and Maclean District Hospital), 7.6 hectares for port facilities and five hectares for correctional facilities (Grafton Correctional Centre).

**Table 9.12**

**Identified Special Use Sites - Clarence Valley LGA**

<b>Name</b>	<b>Total Area (hectares)</b>
Clarence Valley Regional Airport	142.0
North Coast TAFE (Clarence Valley campus)	23.0
Grafton Base and Maclean District Hospitals	11.0
Port facilities	7.6
Grafton Correctional Centre	5.0
<b>Total</b>	<b>188.6</b>

*Source: NSW Department of Planning and Environment (2014)*

- Clarence Valley Regional Airport (142 hectares), otherwise known as Grafton Regional Airport is a substantial employment generating facility within the SP2 Infrastructure zoning category. This airport is located 13km from the Grafton Town Centre and has regular daily flight services to Sydney. Of the 142 hectares of land dedicated to the site, we estimate that approximately 42.6 hectares has been developed, leaving 99.4 hectares of land to be developed into the future.



**Figure 5. Clarence Valley Airport Regional Context**



*Source: SIX maps (NSW Department of Planning and Environment)*

- Additionally, the North Coast TAFE Clarence Valley Campus is a significant contributor to employment lands within the SP2 zoning category. Of the 23 hectares allocated to the site, we estimate that approximately 13.8 hectares has been developed, meaning there are 9.2 hectares available for future development.
- Notably, 108 hectares of land has been designated to SP3 Tourism purposes.

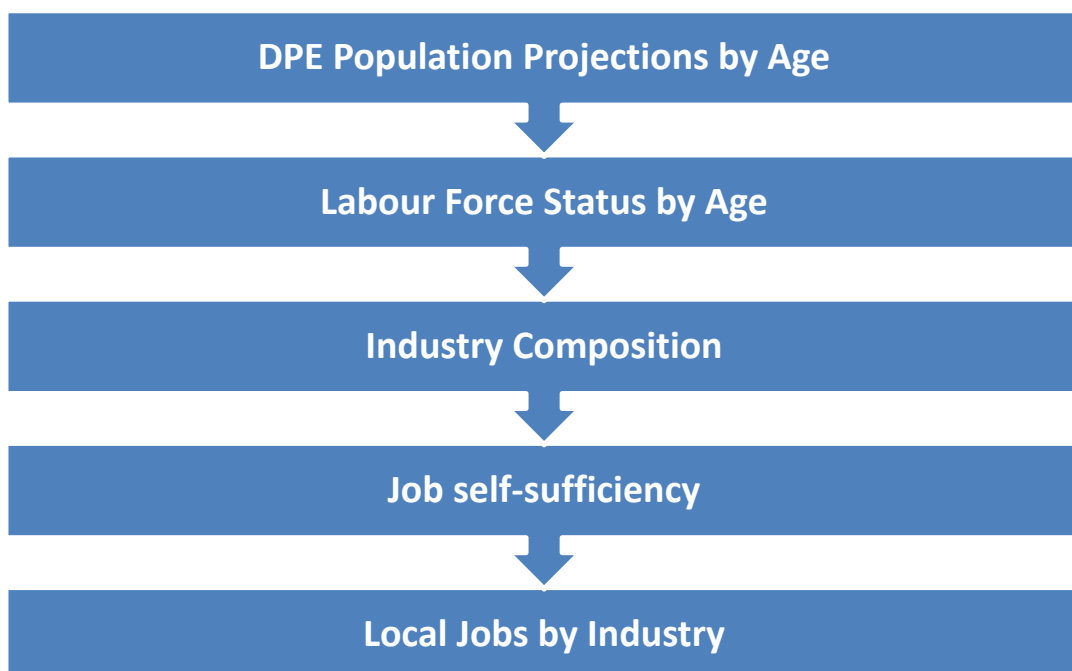
#### **9.5.7 Special Uses – Future Supply**

- In June of 2013, it was announced that the Grafton Regional Airport would receive a \$2.1 million upgrade.
- The project includes an extension of the airport terminal, an additional parking bay for passengers and extra hardstand areas for helicopters. Runway lighting will also be upgraded as well as the airports back-up power supply.
- The airport is expected to open new markets, drive growth and create jobs. Specifically, the airport upgrade will likely generate 15 new local jobs.

## 9.6 Demand for employment land

### 9.6.1 Methodology

- In order to derive the quantity of commercial, industrial and special use land required in the Clarence Valley LGA, we have produced employment projections for the LGA.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry within the Clarence Valley LGA to deliver employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Clarence Valley LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:

1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
  - Demand for retail floorspace is derived using an alternative approach.

### 9.6.2 Employment Projections

- Following 114 jobs additions over the 2006 and 2011, the Clarence Valley LGA workforce is expected to expand by 1,325 jobs over the forecast period (i.e. 2011 to 2031).
- Our projections imply a 515 job increase over the ten years to 2021. As at 2021, the LGA is projected to support 16,054 jobs.
- By 2031, employment in the LGA is expected to expand to 16,864 jobs, which represents growth of 809 jobs between 2021 and 2031.
- At an average annual rate of 66 job additions, the anticipated rate of employment growth is below that observed between 2006 and 2011 (average of 78 jobs per annum).
- By industry, growth is expected to be most pronounced within Health Care and Social Assistance (+373) and Accommodation and Food Services (+250).
- Outright job losses is expected in four industries, with the greatest reductions incurred in traditional industries such as Manufacturing (-185) and Agriculture, Forestry and Fishing (-107).

**Table 9.13**  
**Employment by Industry - Clarence Valley LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	2,326	2,523	2,699	373
Accommodation and Food Services	1,456	1,589	1,706	250
Education and Training	1,403	1,524	1,634	231
Retail Trade	2,212	2,285	2,417	205
Construction	865	880	991	126
Professional, Scientific and Technical Services	525	567	646	121
Transport, Postal and Warehousing	575	639	686	111
Rental, Hiring and Real Estate Services	272	280	361	89
Electricity, Gas, Water and Waste Services	227	253	299	72
Wholesale Trade	445	468	514	69
Financial and Insurance Services	270	301	316	46
Administrative and Support Services	327	340	357	30
Mining	29	30	48	19
Public Administration and Safety	1,462	1,487	1,476	14
Other Services	645	643	658	13
Information Media and Telecommunications	140	124	130	-10
Arts and Recreation Services	158	168	143	-15
Agriculture, Forestry and Fishing	866	803	759	-107
Other*	112	1	-16	-128
Manufacturing	1,224	1,150	1,039	-185
<b>Total</b>	<b>15,539</b>	<b>16,055</b>	<b>16,864</b>	<b>1,325</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form typically required by each industry.
- The following table presents the concordance used to transpose ABS ANSZIC employment industry figures into land use type.



**Table 9.14**  
Industry and Land Use Conversion Matrix - Clarence Valley LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	10%	0%	90%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the next table.

**Table 9.15**  
Employment Additions by Land Use Type - Clarence Valley LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	2	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	3	5	23	42	0	0
Construction	1	11	13	100	0	0
Wholesale Trade	19	37	5	9	0	0
Retail Trade	70	126	4	7	0	0
Accommodation and Food Services	93	82	40	35	0	0
Transport, Postal and Warehousing	13	9	51	38	0	0
Information Media and Telecommunications	0	6	0	0	0	0
Financial and Insurance Services	31	15	0	0	0	0
Rental, Hiring and Real Estate Services	8	81	0	0	0	0
Professional, Scientific and Technical Services	42	79	0	0	0	0
Administrative and Support Services	13	17	0	0	0	0
Public Administration and Safety	25	0	0	0	0	0
Education and Training	12	11	0	0	109	99
Health Care and Social Assistance	20	18	0	0	177	159
Arts and Recreation Services	10	0	0	0	0	0
Other Services	0	15	0	0	0	0

Note: These figures may be subject to rounding

Source: MacroPlan Dimasi

### 9.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Clarence Valley LGA (presented in Table 9.16).

**Table 9.16**

**Indicative Employment Density by Industry and Land Use Type - Clarence Valley LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative

employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 9.17**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Clarence Valley LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	370	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	100	190	5,840	10,430	0	0
Construction	40	330	2,010	15,040	0	0
Wholesale Trade	560	1,100	930	1,830	0	0
Retail Trade	2,790	5,020	510	930	0	0
Accommodation and Food Services	4,670	4,100	6,010	5,280	0	0
Transport, Postal and Warehousing	380	280	10,210	7,560	0	0
Information Media and Telecommunications	0	190	0	0	0	0
Financial and Insurance Services	760	380	0	0	0	0
Rental, Hiring and Real Estate Services	200	2,040	0	0	0	0
Professional, Scientific and Technical Services	1,040	1,970	0	0	0	0
Administrative and Support Services	320	420	0	0	0	0
Public Administration and Safety	610	0	0	0	0	0
Education and Training	480	440	0	0	5,440	4,970
Health Care and Social Assistance	790	710	0	0	10,620	9,540
Arts and Recreation Services	420	0	0	0	0	0
Other Services	0	610	0	0	0	0
<b>Total</b>	<b>13,160</b>	<b>17,780</b>	<b>25,530</b>	<b>41,440</b>	<b>16,060</b>	<b>14,510</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **13,160 sq.m of commercial, 25,530 sq.m of industrial and 16,060 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **17,780 sq.m of commercial, 41,440 sq.m of industrial and 14,510 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 9.18.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 9.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Clarence Valley LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	280	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	80	140	4,380	7,830	0	0
Construction	30	250	1,510	11,280	0	0
Wholesale Trade	420	820	700	1,370	0	0
Retail Trade	2,090	3,770	390	690	0	0
Accommodation and Food Services	3,500	3,080	4,510	3,960	0	0
Transport, Postal and Warehousing	290	210	7,660	5,670	0	0
Information Media and Telecommunications	0	140	0	0	0	0
Financial and Insurance Services	570	280	0	0	0	0
Rental, Hiring and Real Estate Services	150	1,530	0	0	0	0
Professional, Scientific and Technical Services	780	1,480	0	0	0	0
Administrative and Support Services	240	320	0	0	0	0
Public Administration and Safety	460	0	0	0	0	0
Education and Training	360	330	0	0	4,080	3,730
Health Care and Social Assistance	590	530	0	0	7,960	7,160
Arts and Recreation Services	310	0	0	0	0	0
Other Services	0	460	0	0	0	0
<b>Total</b>	<b>9,870</b>	<b>13,340</b>	<b>19,160</b>	<b>31,080</b>	<b>12,040</b>	<b>10,890</b>

Source: MacroPlan Dimasi

- The Alternative Scenario indicates **9,870 sq.m of commercial, 19,160 sq.m of industrial** and **12,040 sq.m of special use** floorspace will be required by 2021.
- Under the Alternative scenario, demand is anticipated to rise for commercial and industrial uses, and ease for special uses relative to the prior ten year period within industrial zoning. Over the ten years to 2031, an additional **13,340 sq.m of commercial, 31,080 sq.m of industrial** and **10,890 sq.m of special uses** floorspace is expected to materialise.

#### 9.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- According to the July 2014 Department of Planning and Environment GIS layers, FSR references are limited in the Clarence Valley LGA. As such, our assessment has relied on average FSRs observed for the broader North Coast region (as presented in Table 9.19)
- Based on derived floorspace requirements and average floor space ratios, MacroPlan Dimasi estimates around **2.3–3.1 hectares of commercial**, **8.4–11.2 hectares of industrial** and **2.9–3.8 hectares of special uses** land will be required by 2031.

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	2.3 - 3.1	1.0	2.3 - 3.1
Industrial	5.0 - 6.7	0.6	8.4 - 11.2
Special Uses	2.3 - 3.1	0.8	2.9 - 3.8

Source: MacroPlan Dimasi

#### 9.6.5 Demand for retail floorspace

The potential drivers of future demand for retail floorspace in the Clarence Valley LGA are summarised below:

- Population growth – which is expected to be low-moderate, growing at an average of 0.5% per annum to 2031 (a net increase of 9.7% or 4,950 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to

year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

### **Quantification of demand**

Table 9.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Clarence Valley LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 9.20 shows the following:

- The residential population of the Clarence Valley LGA generates approximately **102,510 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **1.97 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **24,375 sq.m** by 2031, an increase of about **19%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **12,821 sq.m**, and is expected to increase by about **2,500 sq.m** by 2031.

Total retail demand growth equates to an equivalent land requirement of **5.4 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

Table 9.20

Clarence Valley LGA - retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	52,050	52,550	54,100	55,350	56,250	0.5%
Tourism equiv. pop	5,844	5,900	6,074	6,214	6,315	0.5%
<b>Retail exp. (\$M)</b>						
Food & liquor	290	297	319	342	364	1.4%
Food catering	68	70	76	82	89	1.6%
Apparel	50	51	53	55	58	0.9%
Household	105	106	111	116	121	0.9%
Leisure	29	30	32	34	36	1.1%
General	51	52	56	61	65	1.5%
Retail services	<u>16</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>1.1%</u>
<b>Total</b>	<b>608</b>	<b>622</b>	<b>664</b>	<b>709</b>	<b>752</b>	<b>1.3%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	32,171	32,970	35,392	37,986	40,500	1.4%
Food catering	11,288	11,626	12,635	13,730	14,821	1.6%
Apparel	9,052	9,185	9,617	10,069	10,472	0.9%
Household	34,882	35,395	37,061	38,803	40,356	0.9%
Leisure	4,915	5,012	5,314	5,634	5,932	1.1%
General	8,419	8,653	9,358	10,119	10,869	1.5%
Retail services	<u>2,673</u>	<u>2,726</u>	<u>2,890</u>	<u>3,063</u>	<u>3,226</u>	<u>1.1%</u>
<b>Total</b>	<b>102,510</b>	<b>104,837</b>	<b>111,964</b>	<b>119,580</b>	<b>126,885</b>	<b>1.5%</b>
Floorspace per capita	1.97	1.99	2.07	2.16	2.26	0.8%
<b>Tourism demand</b>						
Equiv. tourism pop.	5,844	5,900	6,074	6,214	6,315	0.5%
Floorspace per capita	<u>1.77</u>	<u>1.80</u>	<u>1.86</u>	<u>1.94</u>	<u>2.03</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>10,358</b>	<b>10,593</b>	<b>11,314</b>	<b>12,083</b>	<b>12,821</b>	<b>1.3%</b>
<b>Total retail demand (sq.m)</b>	<b>112,869</b>	<b>115,431</b>	<b>123,278</b>	<b>131,663</b>	<b>139,707</b>	<b>1.3%</b>
<b>Demand growth (14-31)</b>					<b>26,838</b>	
<b>Estimated land take (ha)</b>					<b>5.4</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 9.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Clarence Valley LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Clarence Valley LGA.

Key findings pertaining to our gap assessment are presented in Table 9.21

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	157.2	31.4	0.2	31.6	8.1	23.5
Industrial	570.4	68.3	167.0	235.3	9.8	225.5
Special Uses	304.6	157.0	0.0	157.0	3.3	153.7

Source: MacroPlan Dimasi

- Overall, there is sufficient land available to accommodate future employment needs over the forecast period.
- More specifically, it is estimated over the forecast period:
  - *Supply of business land will exceed demand by 23.5 hectares*
  - *Supply of industrial land will exceed demand by 225.5 hectares*
  - *Supply of special uses land will exceed demand by 153.7 hectares*
- Constraints such as topography and the cost of providing services (i.e. utilities, roads and upgrades) could reduce the quantum of land available for future development in Clarence Valley LGA.
- Additionally, the location of zoned land may not be consistent with market need, which would also reduce the amount of land available for future expansion.



## 9.8 Conclusions

### 9.8.1 Commercial, Industrial and Special Uses

Between 2006 and 2011, the resident population of Clarence Valley LGA expanded by 2,138 persons – making it the fifth fastest expanding LGA in the North Coast. Due to solid growth, approximately 44% of all residents were aged 50 years and above as at 2011. Notably, the headcount in traditional family age cohorts (0-19 and 35-49) contracted over the five years to 2011.

Population growth has been underscored by migration. According to Census data, net migration into the Clarence Valley LGA totalled 1,594 persons between 2006 and 2011. Locations in regional NSW (predominantly from Newcastle and the Hunter region) constituted an important source for migration into Clarence Valley.

High representation from senior citizens has resulted in demand for health services. Already the largest employing industry in the LGA (15.0%), jobs growth in this industry outstripped all other industries in the Clarence Valley LGA. Over the five year period, this industry absorbed 472 additional jobs.

As at 2011, the Clarence Valley LGA supported 15,539 jobs, accounting for around 9% of the North Coast workforce.

The top five employing industries generally serve the local needs of residents. Comprising of Health Care and Social Assistance (15.0%), Retail Trade (14.2%), Accommodation and Food Services (9.4%), Public Administration and Safety (9.4%) and Education and Training (9.0%), these industries engage over 57% of the local workforce. Notably, approximately 19% of Clarence Valley's workforce is engaged in traditional blue collar industries (e.g. construction, manufacturing and agriculture).

Jobs growth has been most pronounced in service-based industries. Despite a contraction in Retail Trade, the five largest employing industries generated an extra 731 jobs in the Clarence Valley LGA. Considering the total employment gain for the region was just 390 jobs, it is evident that these industries are important.

Mounting job losses in Manufacturing (-166 jobs), Agriculture, Forestry and Fishing (-165 jobs) and Transport, Postal and Warehousing (-69 jobs) reinforces the need for growth in service denominated industries. Our projections indicate further job losses are expected for Manufacturing and Agriculture, Forestry and Fishing over the forecast period.

Key economic and demographic drivers which are expected to influence the Clarence Valley LGA include:

- DPE projections indicate the rate of population growth will ease back to 0.5% per annum out to 2031.
- Population growth to be concentrated in the 65+ age cohort, accelerating the rate of ageing in the Clarence Valley LGA.
- Completion of Pacific Highway upgrades
- Despite a drop in the Australian dollar, sustained pressure from international manufacturers

These trends are implied in our employment projections:

- Ageing to support elevated demand for health and medical services – further expansion in the Health Care and Social Assistance workforce and demand for commercial, industrial and special use floorspace.
- Upgrades to the Pacific Highway improving access to new interstate and regional markets – reflected by job creation in Transport, Postal and Warehousing and Wholesale Trade, and therefore demand for industrial floorspace.

A larger workforce is anticipated to result in greater demand for commercial, industrial and special use premises (e.g. hospitals, education establishments, etc.) premises. Our estimates of demand indicate **23,210–30,940 sq.m of commercial**, **26,838 sq.m of retail**, **50,240–66,970 sq.m of industrial** and **22,930–30,570 sq.m of special use** floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **2.3–3.1 hectares of commercial**, **5.4 hectares of retail**, **8.4–11.2 hectares of industrial** and **2.9–3.8 hectares of special uses** land will be required by 2031.

Overall, there is sufficient land available to accommodate future employment needs over the forecast period. More specifically, it is estimated over the forecast period:

- *Supply of business land will exceed demand by 23.5 hectares*
- *Supply of industrial land will exceed demand by 225.5 hectares*
- *Supply of special uses land will exceed demand by 153.7 hectares*

Constraints such as flooding, topography and the cost of providing services could reduce the amount of land available for future development. Additionally, the location of zoned land may not be consistent with market need, which would also reduce the scope of land available for future expansion.

### 9.8.2 Retail

We make the following conclusions in relation to retail market conditions within the Clarence Valley LGA:

- The Clarence Valley LGA has a defined retail/commercial centres hierarchy that services the existing residents and visitors/tourists reasonably well. The Grafton Major Regional Centre serves an important regional role and is the major focus for government administration, civic/community uses, retail, commercial and health services in the LGA.
- Future population growth is expected to be about 0.5% per annum over the period to 2031, an increase of about 9.7% on current levels, or about 4,950 persons. The population of the LGA at 2031 (56,250) will not be sufficient to trigger thresholds for additional major tenants and enclosed shopping centre floorspace.

- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 26,900 sq.m (a 24% uplift) by 2031, equivalent to about 5.4 ha of land demand.
- Existing retail demand is estimated at 111,200 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 2,487,832 sq.m. However because the retail offer in nearby Coffs Harbour is relatively extensive and relatively accessible, we estimate leakage of about 20% beyond the LGA, resulting in net demand of about 94,500 sq.m, increasing to 107,500 sq.m by 2031.
- Our preliminary analysis indicates that the existing land stock will **be sufficient to support the future retail demand growth across the LGA.**
- The general strategic direction of Council is to encourage future retail development within the identified business zoned land in the Maclean and Yamba town centres, and to encourage additional retail development, or redevelopment/refurbishment to occur within the Grafton city centre, to strengthen this centre as a major regional centre.
- There are no **regional shopping centres** (the Big W anchored Grafton Shopping World is a sub-regional centre) within Clarence Valley, and by 2031, the population will still be of a scale too small to be realistically considered for regional shopping centre scale facilities. This is not to say that new retail formats/concepts may not seek to enter the Clarence Valley market in the future, and the planning system should be flexible enough to allow such uses to be considered in the context of their net community benefits.
- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 10: LGA Analysis – Coffs Harbour

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Coffs Harbour LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Coffs Harbour LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Coffs Harbour LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from DP&E and Coffs Harbour City Council.

### 10.1 Key facts, findings and take-outs

#### 10.1.1 Population growth

- Between 2006 and 2011, the resident population of Coffs Harbour LGA expanded by 4,315 persons. It has the second largest population of all LGAs in the Mid North Coast.

- By age, population growth has been dominated by older age cohorts i.e. 50-64 and 65+.
- During this period, the number of 35-49 residents contracted by 447 persons.
- Over the five years to 2011, net migration into the Coffs Harbour LGA exceeded 3,400 persons, mostly from overseas (50%).
- DPE projections indicate the high rate of population growth in the Coffs Harbour LGA will persist over the forecast period (1.1% per annum out to 2031). While most pronounced in 65+ persons, growth in traditional 'young family' age cohorts will be solid.

### 10.1.2 Employment trends

- As at 2011, the Coffs Harbour LGA supported 25,234 jobs, accounting for around 14% of total jobs in the North Coast.
- The top four employing industries in the LGA are Health Care and Social Assistance (17.2%), Retail Trade (14.7%), Accommodation and Food Services (10.3%) and Education and Training (9.4%).
- Around 82.6% of Coffs Harbour's working residents also work in the LGA – a high rate of containment relative to other North Coast LGAs.
- Between 2006 and 2011, there were 2,074 job additions in the Coffs Harbour LGA – accounting for 18% of total jobs growth in the North Coast region.
- Over the five years to 2011, employment growth was greatest within the Health Care and Social Assistance industry (968 jobs) - nearly four times the amount of employment growth in any other industry.

### 10.1.3 Employment land

- In Coffs Harbour LGA, there are 989 hectares of land zoned for urban employment purposes – comprising of 20% Business, 33% Industrial and 47% Special Uses.
- Special purpose zones are generally used to accommodate 'special' activities such as schools, hospitals, airports, cemeteries as well as water treatment

plants, major roads, community centres, tourist sites and other infrastructure-related items.

- Classified roads, railways, sewerage systems, water supply systems and other miscellaneous uses have been excluded from our estimate of urban employment land for this land use zone.
- Following 1,581 job additions over the five year period to 2011, the Coffs Harbour LGA workforce is expected to expand by an additional 3,433 jobs over the forecast period (i.e. 2011 to 2031).
- Our projections of demand indicate **61,190–81,570 sq.m of commercial, 60,411 sq.m of retail, 82,330–109,780 sq.m of industrial** and **54,810–73,080 sq.m of special use** floorspace will be required by 2031.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **4.1–5.4 hectares of commercial, 12.1 hectares of retail, 10.3-13.7 hectares of industrial** and **5.5–7.3 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available in Coffs Harbour to accommodate future employment needs out to 2031.
- It is estimated:
  - *Supply of business land will exceed demand by 36.5 hectares*
  - *Supply of industrial land will exceed demand by 115.0 hectares*
  - *Supply of special uses land will exceed demand by 322.6 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Coffs Harbour LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Coffs Harbour LGA, particularly for new and emerging industries.

## 10.2 Literature review

There are several local Council plans and policies that have been reviewed and considered from the Coffs Harbour Council LGA. This includes the Coffs Harbour Economic Strategy 2014 – 2017 and Action Plan; Coffs Harbour Business Centres Hierarchy (RCHBCH); the Coffs City Centre Masterplan and the Coffs Harbour Local Growth Management Strategy – Industrial Section 2009 (CHLGMS). RCHBCH builds upon a significant suite of previous documents including the 2006 Retail Strategy and the 2009 Employment Lands Strategy, for example. The Coffs Harbour Economic Strategy and Action Plan aims to analyse opportunities for sustainable economic growth and to demonstrate how to capitalise on these opportunities. The CHLGMS was prepared to establish the supply and future demand for industrial lands in Coffs Harbour.

The following key points are noted:

- The previous MNCRS recognises the importance of Coffs Harbour as a key Major Regional Centre in the region. These centres are expected to accommodate the majority of future commercial development in their respective regions.
- The City Centre Masterplan seeks to revitalise and stimulate economic activity in the Coffs Harbour City Centre – which is the key focus of employment commercial activity in the LGA. Two of the key aims of this Masterplan are to:
  1. Reinstatement of the City Centre as the key retail precinct in Coffs Harbour.
  2. For the City Centre to become the core entertainment precinct for Coffs Harbour.
- Generally, the vision of the Masterplan will be achieved through a range of infrastructure, parking and streetscaping improvements, as well as specific projects for strategic sites and through the development of funding initiatives from landowners/businesses to enable the Masterplan.



- The Review of Coffs Harbour Business Centres Hierarchy (RCHBCH) was conducted in 2011, with a view to establishing whether the centres hierarchy across the LGA was appropriate to accommodate future growth in the LGA. The document was then subsequently used to inform the preparation of the new Coffs Harbour LEP 2013.
- The RCHBCH reviewed other strategic retail/commercial centres related documents – and noted that considerable previous research had been conducted that clearly defined a centres hierarchy across the LGA, and that previous research had held the position that land use policies should ensure the primacy of the Coffs Harbour City Centre (and that the City Centre lacked critical mass).
- The RCHBCH review noted that there was considerable capacity in the Coffs Harbour City Centre to accommodate additional retail and office development. Much of the development in the city centre is low intensity, the planning controls permit much greater density and there are a number of strategic sites under single ownership.
- The RCHBCH indicated that there was sufficient land supply for bulky goods retailing for at least 10 years, as there is an adequate supply of land for such uses, also noting that B5 zoned land should be closely monitored so that the intrusion of non-bulky goods retailing does not occur.
- The RCHBCH recommended that individual retail/commercial tenancies should be restricted to a GFA of 750 sq.m in the B4 zone, to encourage development in this flexible zone without compromising the integrity of other centres.
- Low scale development only should be permitted in the B6 zone, with limits on maximum allowable office/business floorspace of individual tenants, in order to protect the City Centre.
- The 2006 retail strategy earmarked a further 75,000 sq.m of retail floorspace in the City Centre over the following 25 years; the potential for Toormina to increase in floorspace by 10,000 sq.m over the next 15-20 years; that Moonee SC not increase in size over the next 15 years and that an additional 10,000 sq.m of retail be developed within Woolgoolga.

- The RCHBCH also defined a commercial centres hierarchy (pg. 27), which we have outlined later in this section of the report.
- The Economic Strategy and Action Plan identify the Big Banana as a key attraction for visitors.
- The Strategy and Action Plan also outlines the major infrastructure projects planned for Coffs Harbour include the CBD Masterplan to reactivate the CBD, the redevelopment of Brelsford Park and the Jetty/Harbour redevelopment.
- The Action plan stipulates that Coffs Harbour needs to take advantage of underutilised commercial space, due to the trends of working from home, co-working and small micro enterprises.
- One key strategy, 'Planning for Growth' of the Action Plan is to assess the long term availability of adequate and appropriate employment land choices, assess the viability of an integrated freight terminal, ensure adequate health industry lands and encourage the redevelopment of the Marina.
- The CHLGMS recognises the high employment in education due to the location of the Southern Cross University, North Coast TAFE, various schools, the English Language centre and Coffs Harbour senior college.
- The CHLGMS refers to the Coffs Harbour Regional Airport Master Plan which has designated areas to industrial lands and employment focused lands.
- The CHLGMS has identified a number of industrial estates within Coffs Harbour, and forecasts the need for an additional 39.9ha of industrial land between 2006 to 2026.
- Moreover, construction has commenced on the Coffs Harbour Justice Precinct which includes the Coffs Harbour Police Station.

## 10.3 Socio-demographic trends

### 10.3.1 Population change

- According to ABS ERP figures, the Coffs Harbour LGA resident population was 70,972 as at 2011, up from 66,657 in 2006
- During this period, population growth averaged 863 persons per annum.
- With a population of 70,972 (2011), Coffs Harbour is the second largest LGA in the Mid North Coast.

Year	Estimated Resident Population	Total Change (persons)
2001	62,582	
2006	66,657	4,075
2011	70,972	4,315

Source: ABS

- Population growth over the five years to 2011 was greatest amongst older age cohorts, with the number of persons in the 50-64 age cohort increasing by 2031. Albeit lower, the 65+ age cohort expanded by 1,754 persons.
- On the other hand, net losses in the dominant working age cohort (35-49 years) was recorded during the 2006-2011 period (-447 persons).
- As at 2011, persons aged 0-19 years comprised 26% of the LGA's population, while persons aged 50+ constituted 40% of the population.

Table 10.2

## Population By Age (persons) - Coffs Harbour LGA

Age cohort	2006	2011	Change (2006-2011)	Composition
0-19	18,395	18,495	100	26%
20-34	10,052	10,929	877	15%
35-49	14,103	13,656	-447	19%
50-64	13,275	15,306	2,031	22%
65+	10,832	12,586	1,754	18%
<b>Total</b>	<b>66,657</b>	<b>70,972</b>	<b>4,315</b>	<b>100%</b>

### 10.3.2 Migration movements

Inward and outward movements for the Coffs Harbour LGA have been analysed, using 2006 and 2011 Census data.

- Over the five years to 2011, net migration into the Coffs Harbour LGA totalled 3,441 persons – a large proportion of which came from overseas (1,728 persons).
- For persons aged 20-34 (young workers), a net gain was recorded over the five year period (83 persons), however there was a large net migration loss interstate (-849) which suggests these people are moving interstate (primarily QLD) for employment or educational opportunities.
- The largest net migration gain came from the key 'family' age cohorts (0-19 and 35-49). This can be attributed to a larger and more diverse employment base.

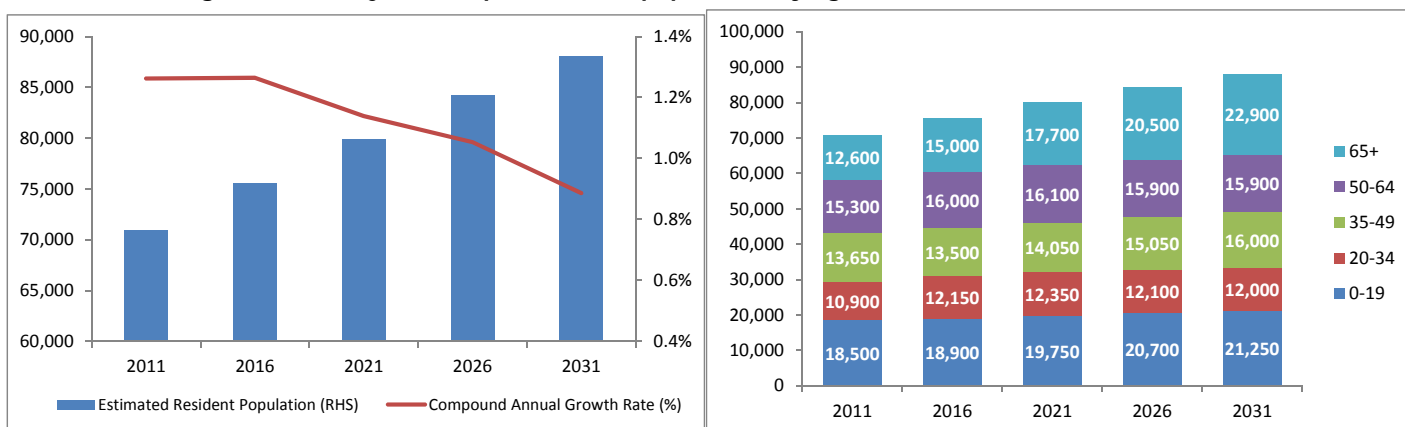
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	40	141	-20	3	47	211
Sydney	228	-86	507	307	147	1,103
Regional NSW	308	177	244	196	67	992
Interstate	-83	-849	238	42	59	-593
Overseas	361	700	412	186	69	1,728
<b>Total Net Migration</b>	<b>854</b>	<b>83</b>	<b>1,381</b>	<b>734</b>	<b>389</b>	<b>3,441</b>

Source: ABS

### 10.3.3 Population projections

- According to the DP&E (2014) projections, the Coffs Harbour LGA population is projected to increase to 88,100 by 2031 – addition of 17,150 persons over the period.

Figure 1. Projected Population and population by age (2011 to 2031)



Source: DP&E, MacroPlan Dimasi

- Population growth is expected to be most pronounced within the 65+ age cohort, expanding by 10,300 persons over the forecast period (out to 2031).
- Growth in traditional 'family' age cohorts (0-19 and 35-49 years) is expected to be solid at 2,750 and 2,350 persons respectively.
- A major challenge for the Coffs Harbour LGA will be to deliver adequate services to a large and ageing resident population.

### 10.3.4 Labour force status

- Of all residents in the Coffs Harbour LGA, around 81% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 58% i.e. 30,521 of 52,493 residents<sup>8</sup>.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking working).
- The Coffs Harbour LGA's employment rate resembles that observed across the North Coast (92%).

**Table 10.4**

**Labour Force Status by Age (number) - Coffs Harbour LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	2,090	449	2,539	1,997	4,536
20 - 29	4,369	583	4,952	1,513	6,465
30 - 39	5,094	447	5,541	1,411	6,952
40 - 49	6,924	452	7,376	1,530	8,906
50 - 59	6,771	414	7,185	2,608	9,793
60 - 69	2,483	172	2,655	5,377	8,032
70 - 79	223	13	236	4,582	4,818
80 - 84	33	0	33	1,553	1,586
85+	4	0	4	1,401	1,405
<b>Total</b>	<b>27,991</b>	<b>2,530</b>	<b>30,521</b>	<b>21,972</b>	<b>52,493</b>

*Source: Census of Population and Housing (2011)*

### 10.3.5 Job containment

- Job self-containment is defined as the percentage of working residents who are employed within the boundaries of the Coffs Harbour LGA.
- Around 82.6% of employed residents in Coffs Harbour LGA also worked within the LGA.

<sup>8</sup> ABS Census of Population and Housing (2011)

- Similar to Clarence Valley LGA, job containment in Coffs Harbour is extremely high (in excess of 80%).
- The remaining 17.4% of working residents travel either to other North Coast LGAs (3.7%) or locations outside the North Coast (13.6%) for work.
- Of working residents who travel to other North Coast LGAs, popular workplace destinations include Clarence Valley (1.6%) and Bellingen (1.3%).

Table 10.5

## Job Containment - Coffs Harbour LGA

	Value
Working residents	27,676
<u>Place of Work (number)</u>	
Coffs Harbour	22,874
North Coast LGAs (ex. Coffs Harbour)	1,033
Outside North Coast	3,769
<b>Total</b>	<b>27,676</b>
<u>Job Containment (%)</u>	
Coffs Harbour	82.6%
North Coast LGAs	3.7%
Other	13.6%
<b>Total</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

- The next table presents job containment rates by industry classification for the Coffs Harbour LGA.
- Relative to the all industries average for the Coffs Harbour LGA (82.6%), eleven industries achieved a higher rate of job containment. All these industries are service orientated, and generally accommodate the needs of local residents.
- Rental, Hiring and Real Estate Services achieved the highest rate of job containment (90.8%).

Table 10.6  
Job Containment by Industry - Coffs Harbour LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	90.8%	3.1%	6.2%	100.0%
Retail Trade	89.8%	2.2%	8.1%	100.0%
Financial and Insurance Services	89.5%	2.5%	8.0%	100.0%
Health Care and Social Assistance	89.4%	2.9%	7.7%	100.0%
Accommodation and Food Services	87.2%	1.8%	11.0%	100.0%
Other Services	86.8%	2.2%	11.0%	100.0%
Professional, Scientific and Technical Services	86.4%	2.0%	11.5%	100.0%
Education and Training	85.7%	8.1%	6.2%	100.0%
Electricity, Gas, Water and Waste Services	85.2%	4.7%	10.1%	100.0%
Information Media and Telecommunications	85.1%	1.2%	13.7%	100.0%
Arts and Recreation Services	82.9%	3.2%	13.9%	100.0%
<b>Across all industries</b>	<b>82.6%</b>	<b>3.7%</b>	<b>13.6%</b>	<b>100.0%</b>
Wholesale Trade	82.3%	4.1%	13.7%	100.0%
Public Administration and Safety	81.7%	10.4%	7.9%	100.0%
Manufacturing	81.6%	5.7%	12.8%	100.0%
Agriculture, Forestry and Fishing	80.7%	2.5%	16.8%	100.0%
Transport, Postal and Warehousing	76.4%	2.7%	20.9%	100.0%
Administrative and Support Services	71.8%	2.2%	26.0%	100.0%
Construction	57.7%	3.8%	38.4%	100.0%
Mining	27.4%	0.0%	72.6%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 10.4 Employment and labour market trends

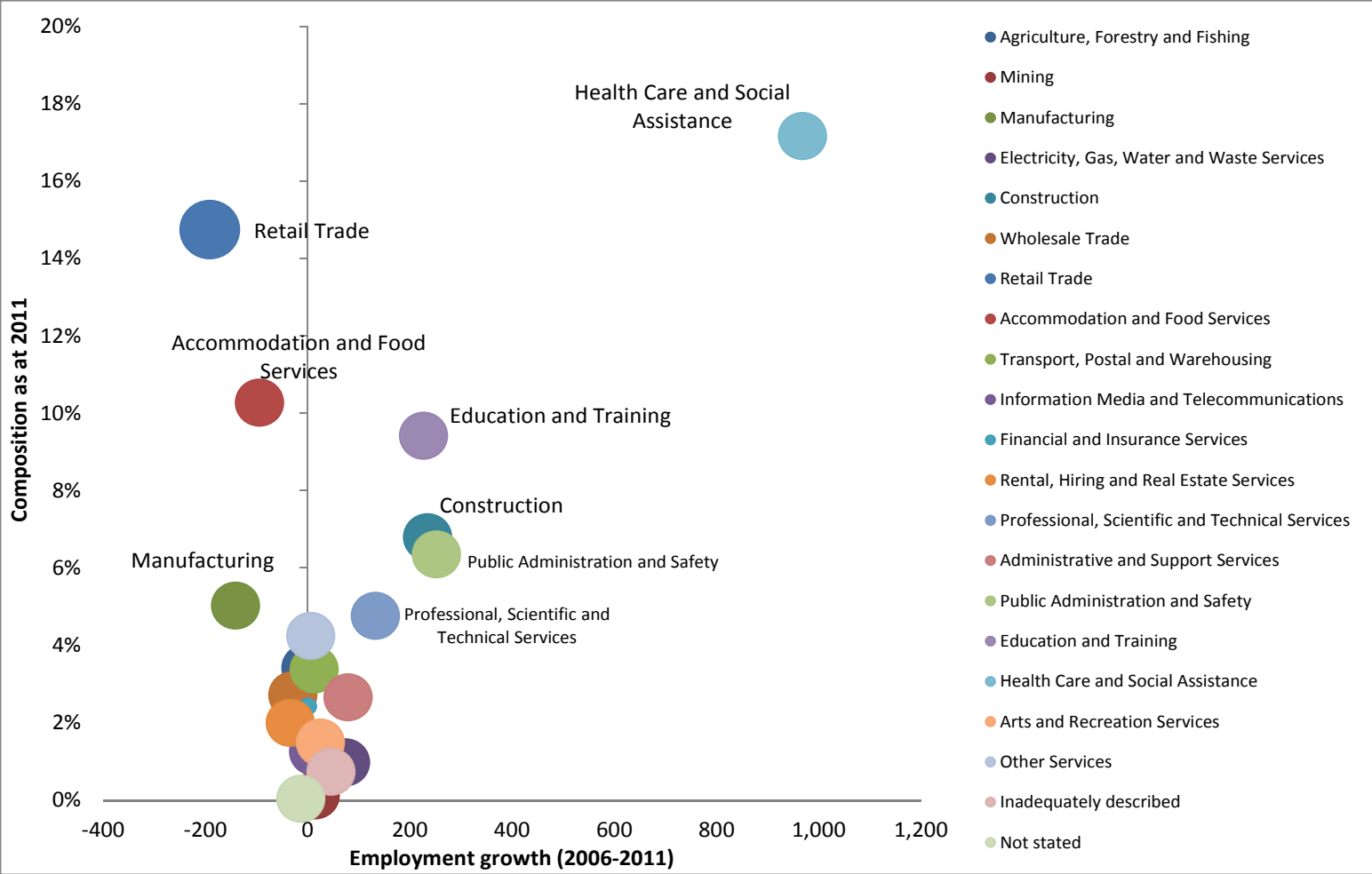
### 10.4.1 Industry composition

- The purpose of the current analysis is to generate an employment profile for the Coffs Harbour LGA and identify the key emerging trends and drivers that have 'shaped' its workforce over the last five years.
- Our analysis of employment trends is based on jobs within the LGA rather than on working residents living within the LGA. This is because demand for employment land is supported by jobs and not residents.
- As at 2011, the Coffs Harbour LGA supported 25,234 jobs, accounting for around 14% of total jobs in the North Coast region.
- By industry, Health Care and Social Assistance is the largest employer within the LGA, accounting for 17.2% of the workforce. Retail Trade (14.7%), Accommodation and Food Services (10.3%) and Education and Training (9.4%) were the next largest employing industries.



- Around 51.6% of the LGA's total workforce is engaged in service industries, which reflects the LGA's strong linkages to tourism.
- The composition of employment is very similar to the broader region, with the only notable difference being lower representation in Manufacturing (5% compared to 6.8% for the North Coast region).
- Between 2006 and 2011, there were 1,581 job additions in the Coffs Harbour LGA – accounting for 18% of jobs growth in the region.
- Over the five years to 2011, employment growth was greatest within the Health Care and Social Assistance industry (968 jobs) - nearly four times the amount of employment growth in any other industry.
- While Retail Trade is the second largest employing industry in the Coffs Harbour LGA, 191 jobs were shed over the five year period.

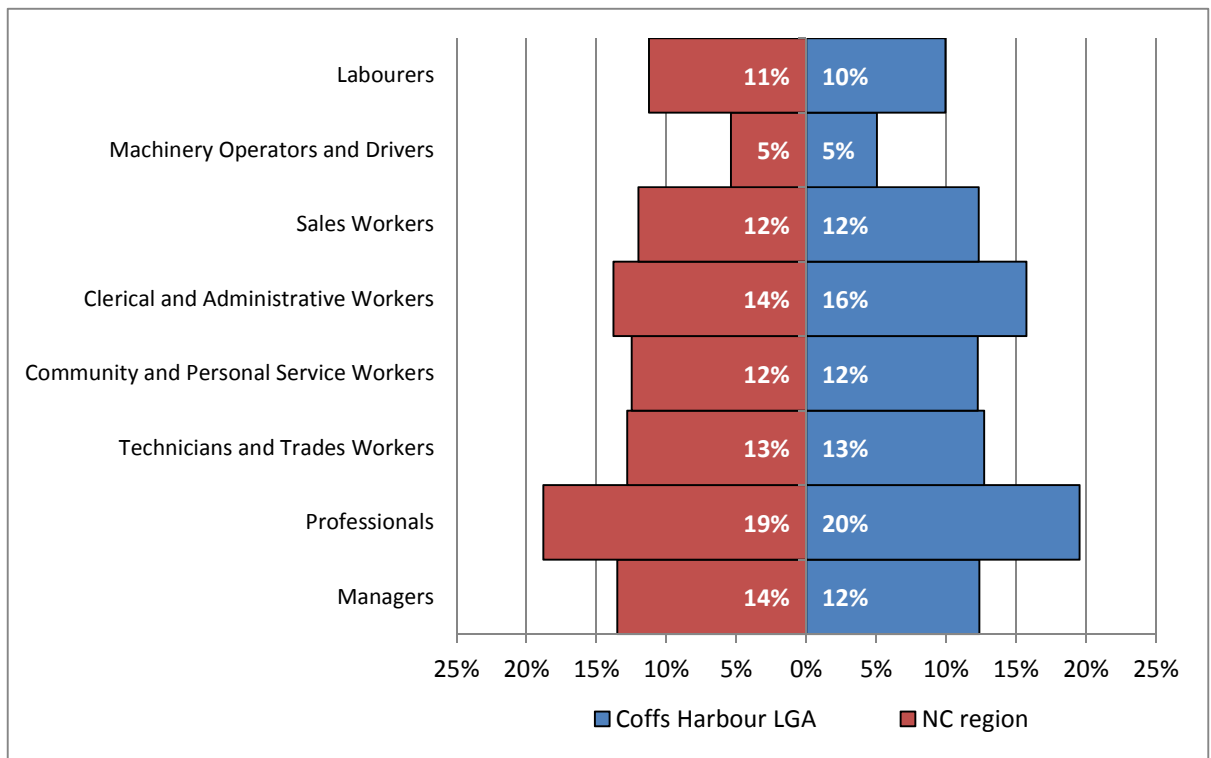
Figure 2. Employment composition and growth by industry, Coffs Harbour LGA



### 10.4.2 Occupation profile

- As at Census 2011, approximately 20% of Coffs Harbour LGA’s residents were employed in a ‘Professional’ capacity.
- Clerical and Administrative Workers constituted as the next largest occupation with 16% of the workforce.

**Figure 3. Occupation Composition (2011)**



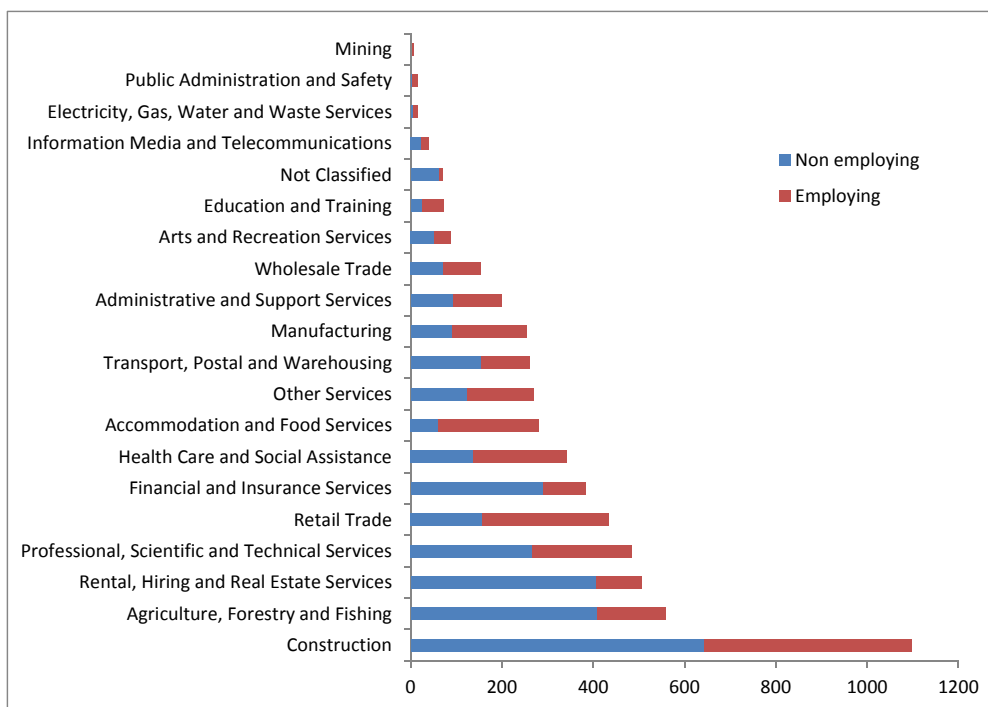
Source: Census 2011, MacroPlan Dimasi

- Coffs Harbour LGA’s occupational profile is relatively consistent with the broader North Coast region.
- Given the ageing demographic within the Coffs Harbour LGA, employment within Health Care and Social Assistance will become increasingly important.

### 10.4.3 Business composition & change

- As at June 2011, there were 5,598 businesses operating within the Coffs Harbour LGA, 56% of which were non employing/sole trading businesses.
- Consistent with the broader North Coast region, the Construction industry entailed the most businesses (1,098), followed by Agriculture, Forestry and Fishing (560) and Rental, Hiring and Real Estate Services (508)
- While it is a key employing industry for the LGA (17.2% of total jobs), the Health Care and Social Assistance industry only accounted for 6% of all businesses in the Coffs Harbour LGA as at 2011.
- According to ABS data<sup>9</sup>, there were six businesses employing 200 or more persons within the Coffs Harbour as at June 2011.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over two year period to 2011, approximately 29 businesses were created in the Coffs Harbour LGA.

<sup>9</sup> 8165.0 – Counts of Australian Businesses, including Entries and Exits, June 2009 to June 2011

- Approximately 40 'Financial and Insurance Services' businesses had been formed over the two years to 2011. Conversely, the number of businesses in the Accommodation and Food Services industry contracted by 24.

**Table 10.7**  
**Business Composition and Change - Coffs Harbour LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	22	11	33
Retail Trade	-18	4	-14
Accommodation and Food Services	-11	-13	-24
Education and Training	-1	5	4
Construction	5	-4	1
Public Administration and Safety	-9	0	-9
Manufacturing	-2	29	27
Professional, Scientific and Technical Services	30	-7	23
Other Services	0	-10	-10
Transport, Postal and Warehousing	6	-25	-19
Agriculture, Forestry and Fishing	12	-24	-12
Administrative and Support Services	-9	-5	-14
Wholesale Trade	-2	6	4
Rental, Hiring and Real Estate Services	2	-3	-1
Financial and Insurance Services	31	9	40
Arts and Recreation Services	2	-4	-2
Electricity, Gas, Water and Waste Services	0	9	9
Information Media and Telecommunications	1	-3	-2
Mining	0	-3	-3
Not Classified	7	-9	-2
<b>Total</b>	<b>66</b>	<b>-37</b>	<b>29</b>

*Source: ABS*

#### 10.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- The greatest attribute of the Coffs Harbour economy is the diversity and scale of employment within the LGA, particularly in comparison to the surrounding LGAs.
- The Coffs Harbour LGA has a strong pull from the other LGAs, with strong inward migration, particularly from persons aged 20-34. This reflects the greater employment opportunity within the LGA.
- In line with national trends, the population of Coffs Harbour has a clear skew to aged persons with 40% being 50 or above. Consequently, this is likely to result

in a large retirement of the workforce over the forecast period which will place considerable strain on the local labour market.

- Job opportunities to younger residents is encouraged which will assist in mitigating the outflow of these people to south-east QLD and elsewhere in NSW.

## **10.5 Employment Land Supply**

### **10.5.1 Zoned Urban Employment Land**

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Coffs Harbour LGA.
- The information presented in this supply section is based on the Coffs Harbour Local Environmental Plan 2013.
- Three active employment land use categories are used in the Coffs Harbour LGA, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

**Table 10.8**  
Zoned Employment Land - Coffs Harbour LGA

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	7.0	1%
	B2. Local Centre	43.1	4%
	B3. Commercial Core	41.8	4%
	B4. Mixed Use	20.8	2%
	B5. Business Development	51.3	5%
	B6. Enterprise Corridor	33.0	3%
	<b>Total</b>	<b>196.9</b>	<b>20%</b>
Industrial	IN1. General Industrial	282.9	29%
	IN3. Heavy Industrial	31.1	3%
	IN4. Working waterfront	12.6	1%
	<b>Total</b>	<b>326.6</b>	<b>33%</b>
Special Uses	SP1. Special Activities	429.7	43%
	SP2. Infrastructure	34.8	4%
	SP3. Tourist	1.5	0%
	<b>Total</b>	<b>465.9</b>	<b>47%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>989.4</b>	<b>100%</b>

Source: NSW Department of Planning and Environment (2014)

- The Coffs Harbour LGA has 989.4 hectares of zoned urban employment land.
- It is estimated approximately 47% of zoned urban employment land is for Special Uses – predominantly for ‘special activities’ (i.e. SP1 Special Activities).
- The next largest type, land zoned for industrial uses exceeds 326 hectares.
- Within the six designated business zones (B1, B2, B3, B4, B5 and B6), there is around 51.3 hectares zoned to B5 Business Development, 43.1 hectares to B2 Local Centre and 41.3 hectares to B3 Commercial Core.

# Map 10.1













## Coffs Harbour City Council

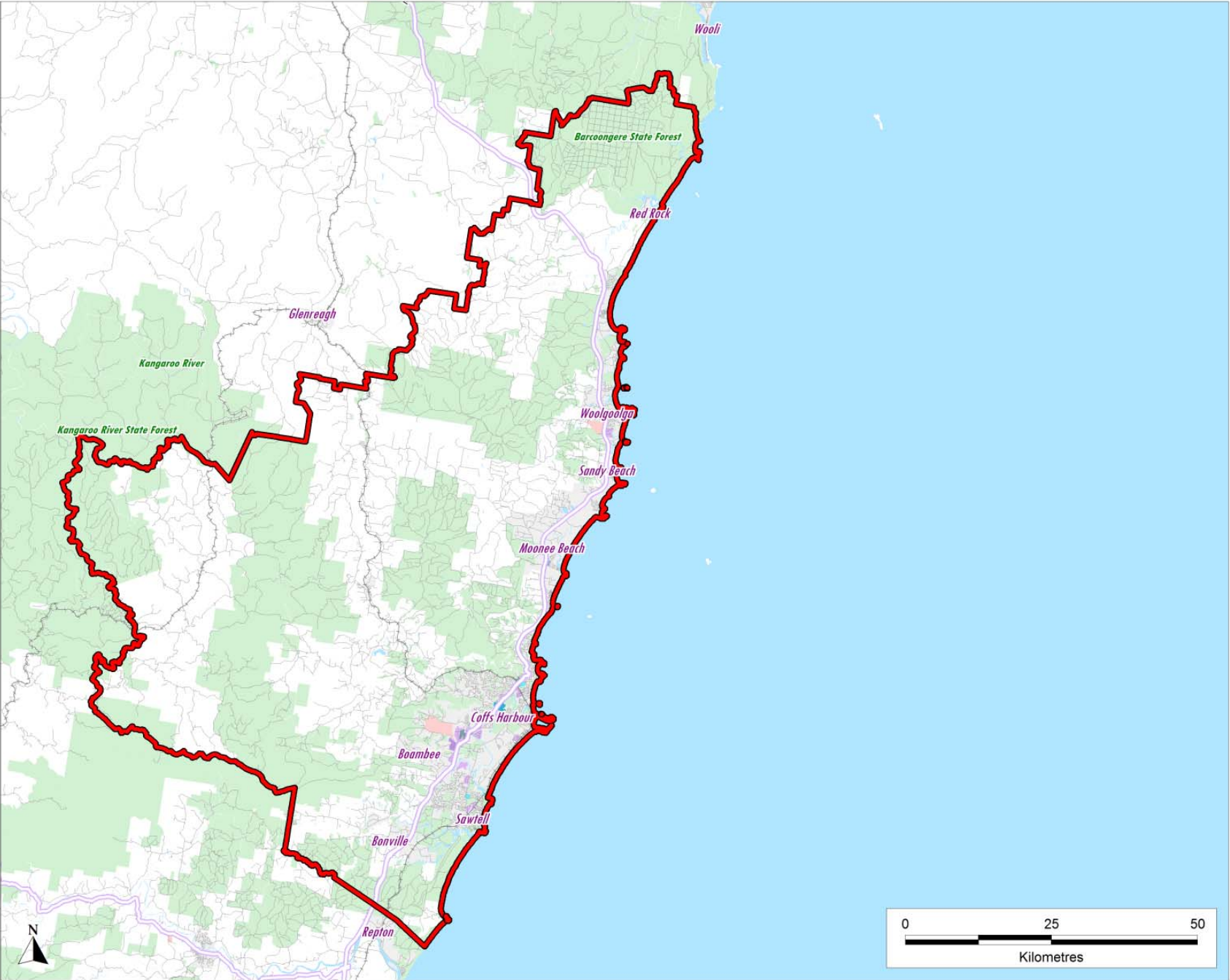
### Employment Land Zones

Legend \*

 Coffs Harbour City Council Boundary

Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





# Map 10.2

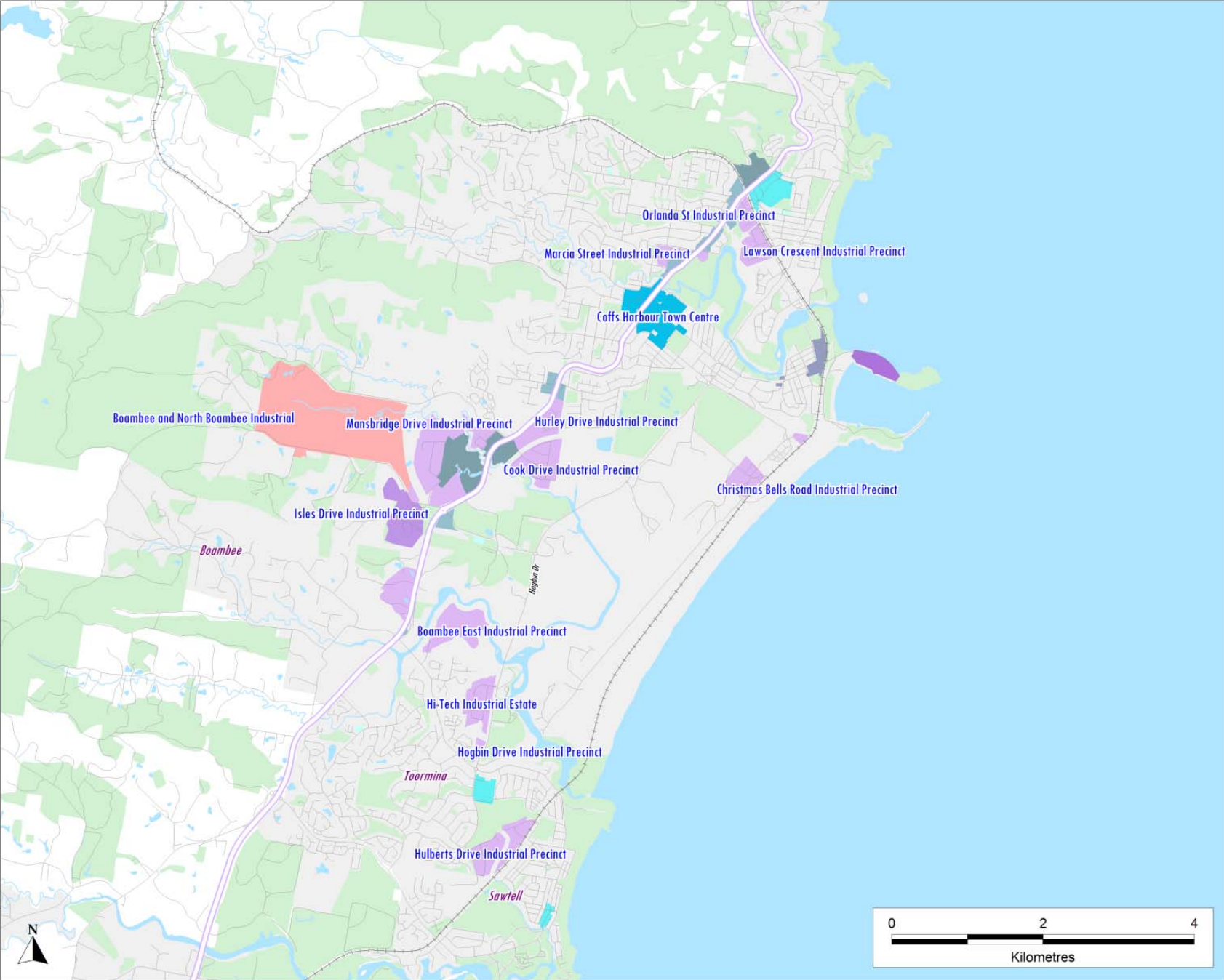
## Coffs Harbour

### Employment Land Zones

#### Legend \*

##### Land Zones

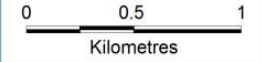
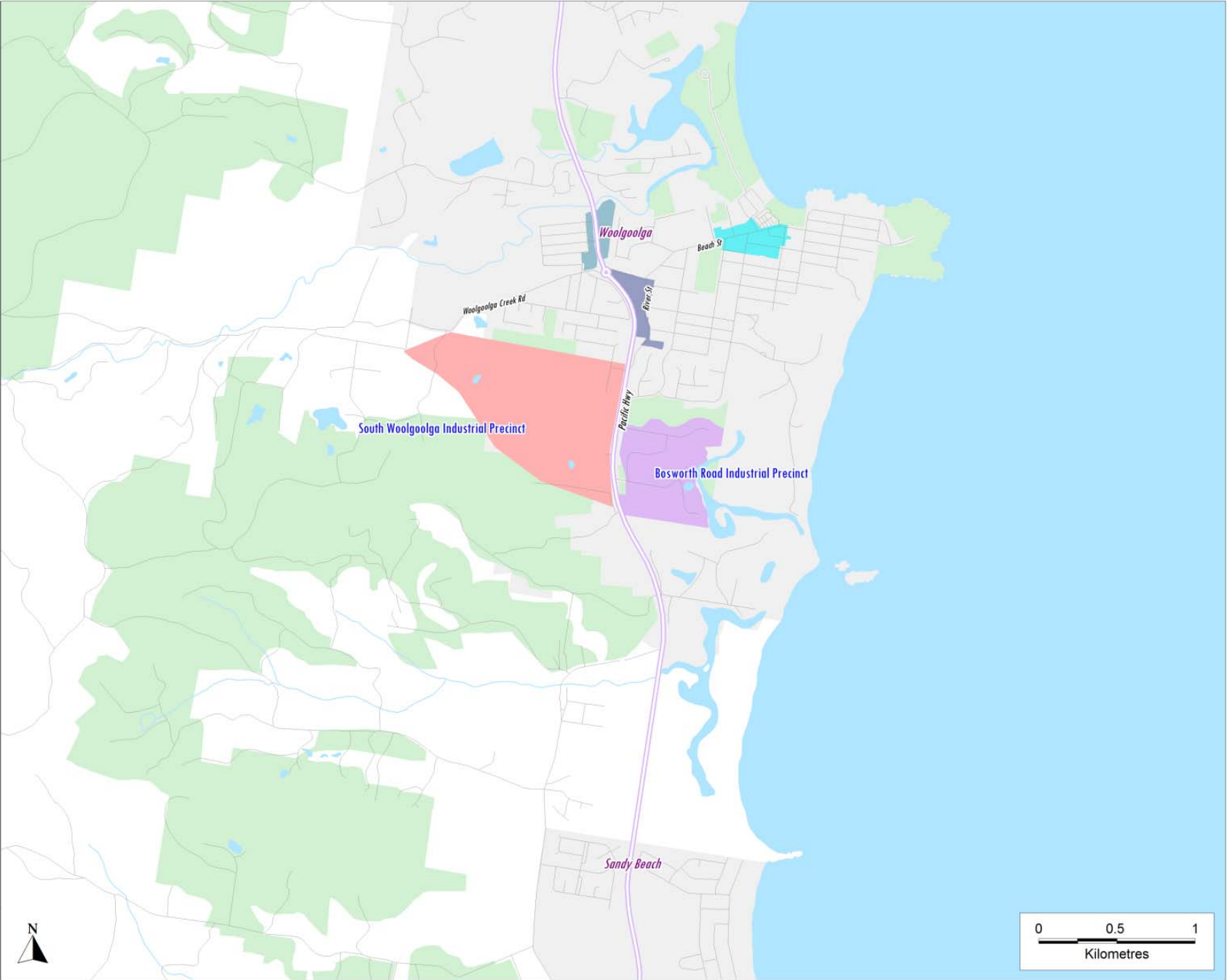
- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



# Map 10.3

## Woolgoolga Planning Zones

- Legend\***
- Land Zones**
- B1
  - B2
  - B3
  - B4
  - B5
  - B6
  - B7
  - IN1
  - IN2
  - IN3
  - IN4
  - Proposed Industrial Precinct



### 10.5.2 Industrial – Existing supply

- Three industrial land use zones are used in the Coffs Harbour LGA i.e. IN1 General Industrial, IN3 Heavy Industrial and IN4 Working Waterfront.
- Eleven precincts have been identified in the Coffs Harbour LGA (as presented in Table 10.9).

**Table 10.9**  
Established Industrial Precincts - Coffs Harbour LGA

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
Isles Industrial Park	116.0	85.0	73%
Cook Drive Industrial Precinct	35.0	34.0	97%
Bosworth Road Industrial	35.0	24.0	69%
Boambee East Industrial Estate	30.0	14.0	47%
Hulberts Road Industrial	27.0	25.0	93%
Orlando Street Industrial Precinct	24.0	23.5	98%
High Tech Drive Industrial Estate	20.0	19.0	95%
Christmas Bells Road Industrial	17.0	13.0	76%
Hurley Drive	15.0	13.0	87%
Mansbridge Drive Industrial Area	12.0	9.0	75%
Marcia Street Industrial	12.0	11.0	92%
Hogbin Drive Industrial Precinct	5.0	3.0	60%
<b>Total</b>	<b>348.0</b>	<b>273.0</b>	<b>78%</b>

Source: MacroPlan Dimasi

Some key findings pertinent to our review of industrial precincts include:

- Identified precincts occupy approximately 348 hectares of land.
- Notably, there are two significant industrial estates; the Isles Industrial Precinct (116.0 hectares) and the Cooks Drive Industrial Estate (35.0 hectares).

- Positioned on the Pacific Highway, the **Isles Industrial Park** is located 4 km south from Coffs Harbour CBD. The estate layout allows for a road network that gives the two inner industrial islands easy B-Double and semi-trailer access. The outer ring is designated for smaller businesses.
- The **Cook Drive Industrial Precinct** is located approximately 2km south of the Coffs Harbour CBD, and falls within the perimeter of the town and surrounds. Through Cook Drive the precinct has direct access to the Pacific Highway, and more importantly key trade regional locations along the Mid North and Far North Coast.
- Existing uses at this precinct include manufacturers (BlueScope Lysaght), Campbell's Cash and Carry and some 'local' businesses (e.g. Boambee Industrial Supplies, the Paddock Stock Feed and Saddler, Coffs Metal fencing, etc.).
- The size of other industrial precincts range between 5 and 35 hectares.
- Of the total, it is estimated that around 273 hectares or 78% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 75 hectares of zoned capacity available for future development.
- At an observed floor space ratio of 0.8:1, approximately 60 hectares of industrial floorspace could be delivered through existing zoned industrial land (assuming there are no constraints).

### 10.5.3 Industrial – Future supply

- Three areas are identified as having potential for future Industrial land use.
- The size and anticipated release times for these future precincts are presented in the table below.

**Table 10.10****Future Industrial Precincts - Coffs Harbour LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
South Woolgoolga Industrial	14.0	0 - 10
North Boambee (Precinct 3)	21.0	10 - 20
North Boambee (Precinct 4)	17.0	10 - 20
<b>Total</b>	<b>52.0</b>	

*Source: Mid North Coast Regional Strategy*

- Combined, the three precincts entail 52 hectares of industrial land – 14 hectares by 2021 and 38 hectares in the following ten year period (to 2031).

#### 10.5.4 Retail & Commercial – Existing supply

The Coffs Harbour LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 10.3 and Map 10.4.

- The Coffs Harbour LGA centres hierarchy generally consists of the following structure – as defined in the RCHBCH.
  - Coffs Harbour City Centre.
  - District Centres: Woolgoolga Town Centre, Toormina and Moonee.
  - Specialised centres.
  - Town Centres.
  - Neighbourhood Centres
  - Inland and coastal villages (such as Boambee, Moonee Beach, Coramba)

#### Coffs Harbour City Centre

- The Coffs Harbour City Centre is the major retail, commercial, leisure, tourism, administrative and health centre for the Coffs Harbour LGA and indeed, the surrounding areas. It is one of four Major Regional Centres in the Mid North Coast Region.

- The Coffs Harbour regional centre provides high level health, entertainment, airport facilities, tertiary education facilities, administrative/civic facilities and excellent tourism infrastructure. The centre also provides a relatively comprehensive range of retail, business and community services serving the residents across the broader region including Bellingen and Nambucca.
- The majority of the business zoned land (163.3 ha) within the major regional centre is located within the Coffs Harbour City Centre, providing 41.8 ha of B3 zoned land.
- Major retail and commercial facilities supported within the Coffs Harbour City Centre include:
  - Coffs Central is the largest enclosed facility in the City Centre, located on the northern side of Harbour Drive in the Coffs Harbour. This centre comprises 13,300 sq.m of retail floorspace anchored by a Big W dds. Coles Coffs Harbour was previously located in this centre prior to its exodus in 2012.
  - The balance of the retail floorspace in Coffs Harbour City Centre includes a freestanding Woolworths supermarket on Park Avenue and a collection of food catering, and non-food convenience strip retail along Harbour Drive. There are a large number of complementary specialty retailers located throughout Coffs Harbour City Centre, skewed towards boutique food catering and apparel retailers. In total the Coffs Harbour City Centre provides an estimated 59,500 sq.m of retail floorspace.

#### **District Centres and specialised centres**

- The Woolgoolga Town Centre includes two supermarkets, being a Supa IGA and an IGA as well as a range of supporting specialty retail floorspace including convenience retail such as a butcher, bakery and fresh fruit and vegetable store, a small provision of boutique apparel shops and an assortment of retail services. In total, Woolgoolga town centre is estimated to provide approximately 6,500 – 7,500 sq.m of retail floorspace. The Woolgoolga town centre provides 8 ha of B2 zoned land, 6 ha of B4 zoned land and 5 ha of B5 zoned land.



- Toormina includes some 8.8 ha of B2 zoned land of which includes Centro Toormina, a sub-regional centre located south of Coffs Harbour. The shopping centre provides approximately 20,400 sq.m of retail floorspace and is anchored by a Kmart dds and Coles and Woolworths supermarkets. In total, Toormina is estimated to provide approximately 24,000 – 26,000 sq. of retail floorspace.
- Moonee, located 13 km north of Coffs Harbour, is anchored by the convenience based Moonee Beach Shopping Centre, which includes a Coles supermarket and supporting retail specialty. In total, Moonee Town Centre includes 5.3 ha of B2 zoned land and 5.4 ha of B4 zoned land and is estimated to provide approximately 10,000 – 12,000 sq.m of retail floorspace.
- There are several retail facilities at Park Beach (within the broader Coffs Harbour Regional Centre), including Park Beach Plaza, Homebase and Northside Shopping Centre. We estimate these centres provide in the order of 39,900 sq.m of retail floorspace. The suburb of Park Beach provides 0.8 ha of B1 zoned land, 17.1 ha of B2 zoned land and 10.8 ha of B5 zoned land.
- There are two defined specialised ‘tourist centres’ (Bray Street and Jetty), which both effectively form part of the Coffs Harbour Major Regional Centre.
- There are several specialised highway oriented centres across the LGA that provide a broad mix of uses, some including bulky goods retail.

#### **Sawtell Town Centre**

- The Sawtell Town Centre provides 3.7 ha of B2 zoned land and includes approximately 3,000 – 4,000 sq.m of retail floorspace. There are no supermarkets located in Sawtell, with the main retail strip containing a range of food catering retail options including cafés, restaurants, and take away food options. There is a small provision of specialty retail including a few boutique fashion stores, a newsagency and pharmacy.

#### **Neighbourhood centres**

- There are a range of Neighbourhood Centres identified across the LGA, including developed centres such as Boambee East, Bray Street, Emerald Beach, Northside and Woolgoolga (River Street), which typical provided a limited range of goods and services for the surrounding population.

- There are also several Neighbourhood Centres which are zoned but not yet developed, such as William Sharp Drive, Corindi, Korora and Safety Beach.

#### **Villages centres**

- There are a number of small village centres distributed elsewhere across the LGA, generally serving the convenience needs of the immediate surrounding populations in these areas. These centres might provide a small general store and some small scale retail uses like a café. Examples include Coramba, Ulong and Red Rock.



# Map 10.4

## Coffs Harbour City Council Retail Provision

### Legend \*

Coffs Harbour City Council Boundary

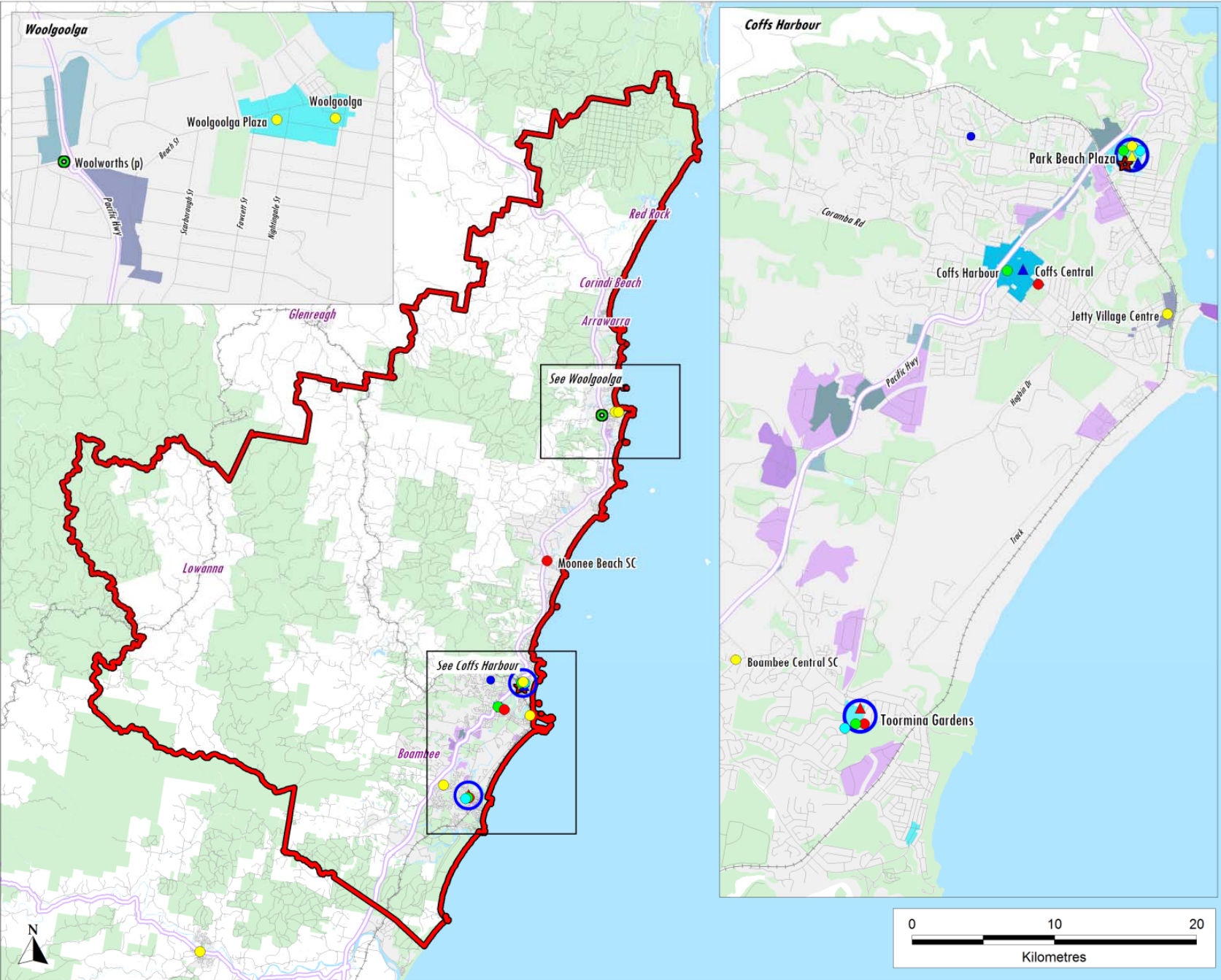
### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

### Retail Competition

- Sub-Regional Centre
- Myer
- Big W
- Target
- Kmart
- Potential DDS
- Woolworths
- Coles/Bi-Lo
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores





# Map 10.5 Coffs Harbour City Council

## Bulky/ Homemaker Goods Retailing

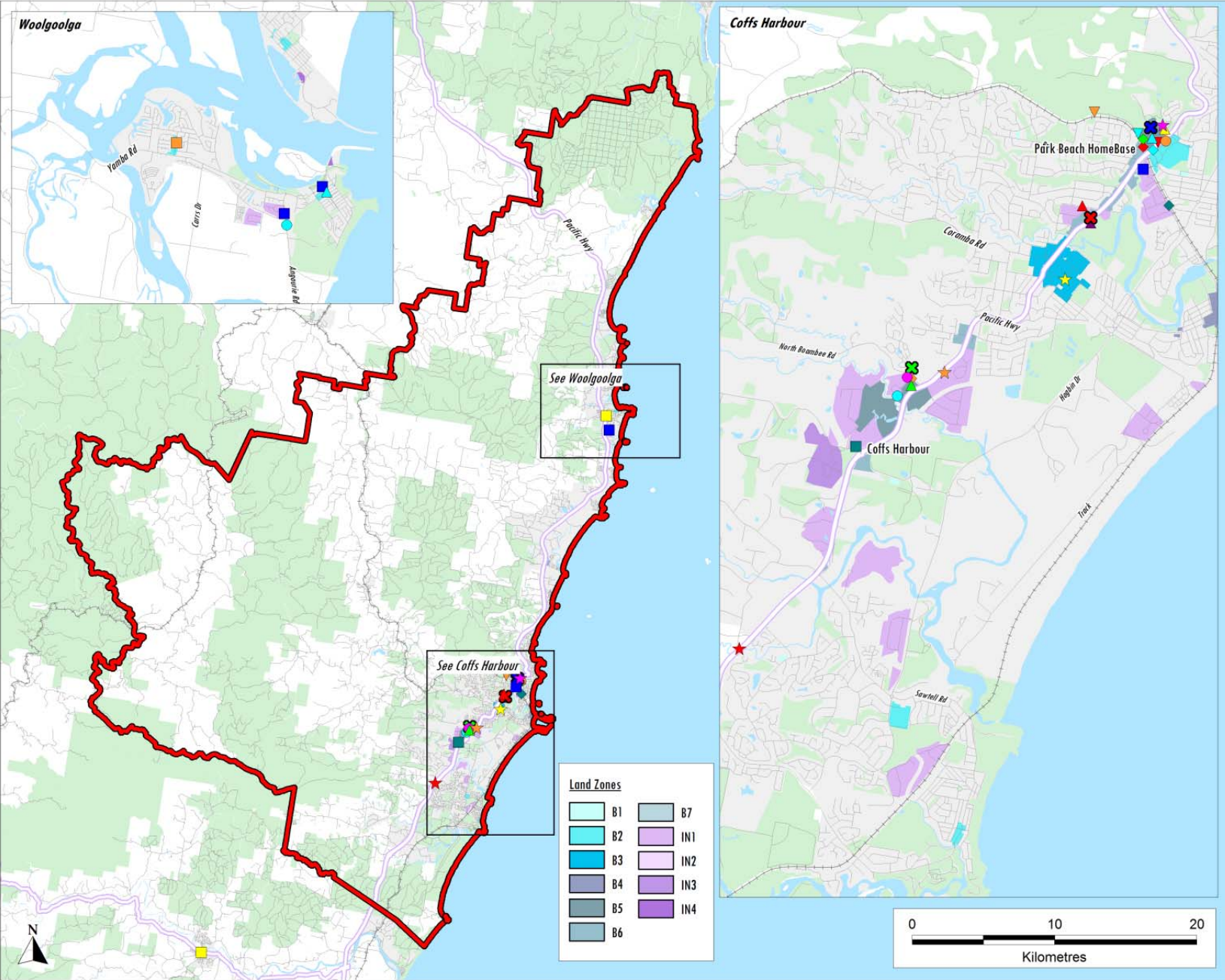
### Legend \*

Coffs Harbour City Council Boundary

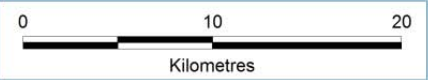
#### Bulky Goods Retailers

- Bunnings Warehouse
- Mitre 10
- Thrifty Link
- Clark Rubber
- Spotlight
- Autobarn
- Bursons
- Jaycar Electronics
- Repco
- Super Cheap Auto
- Forty Winks
- Betta Home Living
- JB Hifi
- The Good Guys
- Fantastic Furniture
- Freedom
- Harvey Norman
- Super A Mart
- Vast Interior
- Amart Sports
- BCF

*\* Hollow symbols indicate proposed stores*



Land Zones	
B1	B7
B2	IN1
B3	IN2
B4	IN3
B5	IN4
B6	



### Business zoned land capacity for retail and commercial floorspace

Table 10.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **196.9 hectares of business zoned land** within the Coffs Harbour LGA, of which 7.0 ha is B1 zoned land, 43.1 ha is B2 zoned land and 41.8 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is about 51.3 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts. Coffs Harbour Council encourages bulky goods to be developed in the B5 zone and discourages other non-bulky goods retail in this zone.
- There is also 20.8 ha of B4 zoned land and 33 ha of B6 zoned land within the LGA.
- We have applied FSRs for each business zone type from Coffs Harbour LEP 2013 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Coffs Harbour LGA to be in the order of 2,667,447 sq.m.
- We estimate that there is a net inflow from the LGA in the order of about 10%, with outflows of expenditure more than matched by inflows from the Nambucca and Clarence Valley – in particular for higher order/bulky goods retailing. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 10.11**  
Coffs Harbour LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1	7.0	0.7	46,758.57
Total B2	43.1	1.0	431,086.59
Total B3	41.8	3.1	1,291,055.66
Total B4	20.8	1.9	401,379.86
Total B5	51.3	0.5	256,432.88
Total B6	<u>33.0</u>	0.7	<u>240,733</u>
<b>Total LGA</b>	<b>196.9</b>		<b>2,667,447</b>

Source: MapInfo; NSW Govt; MacroPlan Dimasi

### 10.5.5 Retail & Commercial – Future supply

There are a number of proposed retail developments likely to occur within the Coffs Harbour LGA. The following developments are of most relevance to our study:

- The proposed expansion and upgrade of Park Beach Plaza in Coffs Harbour, which is proposed to include a major department store Myer (10,000 sq.m) and additional specialty tenants (4,942 sq.m). This expansion has development approval with the potential for construction to start late 2014.
- A Masters Home Improvement store of 10,747 sq.m is proposed for construction in Coffs Harbour and is due for completion in late 2015.
- A new business park including 5,326 sq.m of bulky goods salesrooms is in the early stages of construction in Coffs Harbour. Once completed, the development will also include a service station, tyre outlet, 2 light industrial tenants with a total floor area of 9,384 sq.m.
- A new 3,425 sq.m Woolworths supermarket is currently under construction in Woolgoolga and is due for completion in 2015.

### 10.5.6 Special Uses – Existing supply

- As outlined in the Coffs Harbour LEP 2013, there are three land use zones associated with 'Special Uses'; SP1 Special Activities, SP2 Infrastructure and SP3 Tourist.
- Special purpose zones are generally used to accommodate 'special' activities such as schools, hospitals, airports, cemeteries as well as water treatment plants, major roads, community centres, tourist sites and other infrastructure-related items.
- Classified roads, railways, sewerage systems, water supply systems and other miscellaneous uses have been excluded from our estimate of urban employment land for this land use zone.
- The 447.0 hectares of identified special uses zoned land includes 325 hectares for an air transport facility (i.e. Coffs Harbour Airport), 102 hectares for an education establishment (i.e. the Southern Cross University Coffs Harbour campus) and 20 hectares for a health service facility (i.e. the Coffs Harbour Health Campus).

Table 10.12

## Identified Special Use Sites - Coffs Harbour LGA

Name	Total Area (hectares)
Coffs Harbour Airport	325.0
South Cross University (Coffs Harbour campus)	102.0
Coffs Harbour Health Campus	20.0
<b>Total</b>	<b>447.0</b>

Source: MacroPlan Dimasi

- Zoned SP1, The Coffs Harbour Airport dominates the 'Special Uses' land zoning category. Located approximately 5 minutes from the Pacific Highway, 2 minutes from the university and 10 minutes to the Town Centre, this airport hosts the major Australian domestic airlines including Qantas, Virgin and Tiger Air.



**Figure 5.** Satellite Image of the Coffs Harbour Airport & Southern Cross University



Source: SIX maps (NSW Department of Planning and Environment)

- It is estimated that approximately 97.5 hectares of the land dedicated to 'air transport facilities' has been developed, allowing for 227.5 hectares to be developed in the future.
- Also zoned as SP1, the Southern Cross University encompasses an area of 102 hectares. The university offers a number of courses including business, hotel and resort management, psychology, teacher education, arts, social sciences and information technology.
- Of the 102 hectares currently zoned as 'educational establishment', we estimate that approximately 20.4 hectares has been developed, suggesting there is a further 81.6 hectares of land available for development in the future.
- In addition, The Coffs Harbour Health Campus is a significant contributor to land zoned as SP2. The site has a total land area of 20 hectares, of which we estimate that approximately 14 hectares has been developed, with a remaining 6 hectares of land available to be developed in the future.
- The site is located on the Pacific Highway and opposite the Isles Industrial Park. The centre encompasses one building which includes the UNSW Medical School and is located 10 minutes from the centre of Coffs Harbour.

**Figure 6. The Coffs Harbour Health Campus**



Source: NSW Health

- There is also approximately 1.5 hectares of land zoned as SP3 Tourist.

### 10.5.7 Special Uses – Future supply

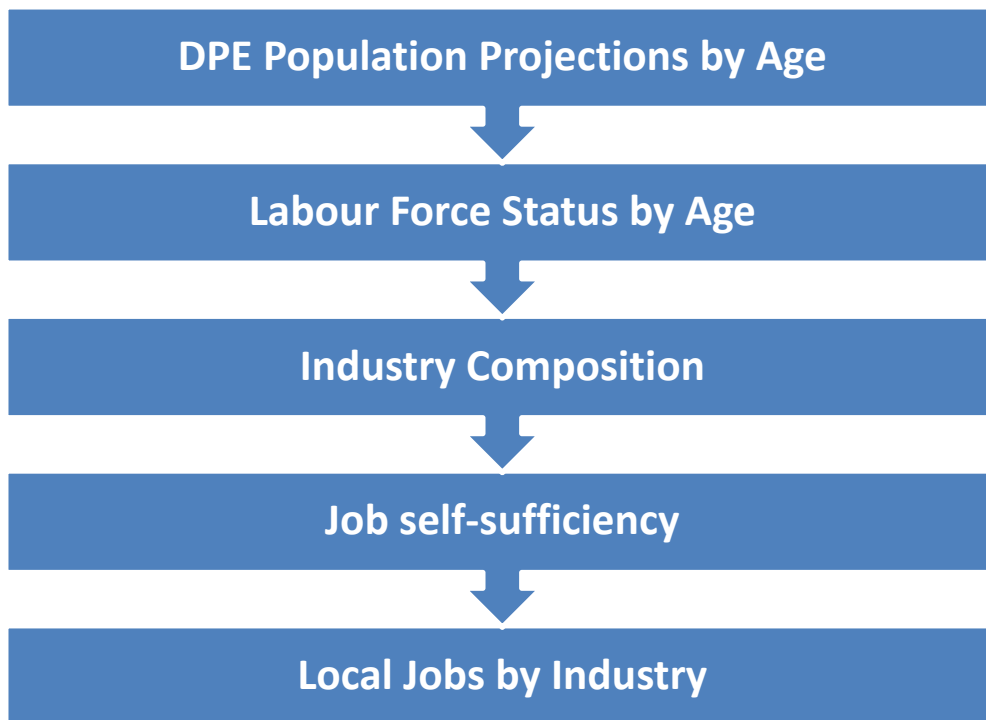
- Construction of a new \$11.4 million aviation rescue fire station has begun at the Coffs Harbour Airport. The project will include two vehicle bays, a vehicle maintenance bay as well as workshop and administration areas. Construction of the facility was due for completion in November 2014. This will be followed by a fit out of the facility with services to commence in 2015.
- Additionally, Coffs Harbour is expecting funding for a cultural centre within the city centre.

## 10.6 Demand for employment land

### 10.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in the Coffs Harbour LGA, we first generate employment projections for the Coffs Harbour LGA.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Coffs Harbour LGA to deliver employment.

- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Coffs Harbour LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.



### 10.6.2 Employment Projections

- Following 1,581 job additions over the five year period to 2011, the Coffs Harbour LGA workforce is expected to expand by an additional 3,433 jobs over the forecast period (i.e. 2011 to 2031).
- Over the decade to 2021, our employment projections imply 1,512 job additions for the Coffs Harbour LGA. As at 2021, the LGA is projected to entail 26,755 jobs.
- By 2031, employment in the LGA is expected to increase further to 28,665, representing 1,910 extra jobs since 2021.
- At an average growth rate of 171 jobs per annum, the projected rate of employment growth is below that observed during the 2006 and 2011 period (average of 317 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+972), Education and Training (+720) and Retail Trade (+608).
- Alternatively, three industries are expected to incur job losses – Manufacturing (-238), Agriculture, Forestry and Fishing (-176) and Mining (-3).

**Table 10.13**  
**Employment by Industry - Coffs Harbour LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	4,333	4,764	5,305	972
Education and Training	2,377	2,650	3,097	720
Retail Trade	3,722	3,961	4,330	608
Accommodation and Food Services	2,594	2,925	3,126	532
Financial and Insurance Services	611	684	774	163
Electricity, Gas, Water and Waste Services	246	318	398	152
Transport, Postal and Warehousing	853	937	1,004	151
Construction	1,716	1,793	1,864	148
Professional, Scientific and Technical Services	1,202	1,312	1,348	146
Administrative and Support Services	672	715	795	123
Other Services	1,072	1,151	1,176	104
Wholesale Trade	686	749	774	88
Public Administration and Safety	1,604	1,580	1,663	59
Arts and Recreation Services	376	407	430	54
Rental, Hiring and Real Estate Services	504	586	516	12
Information Media and Telecommunications	315	321	315	0
Mining	32	27	29	-3
Agriculture, Forestry and Fishing	864	803	688	-176
Other*	194	2	0	-194
Manufacturing	1,270	1,071	1,032	-238
<b>Total</b>	<b>25,243</b>	<b>26,755</b>	<b>28,665</b>	<b>3,422</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built-form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 10.14**  
Industry and Land Use Conversion Matrix - Coffs Harbour LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	30%	0%	70%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the next table.

**Table 10.15**  
Employment Additions by Land Use Type - Coffs Harbour LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	7	8	65	72	0	0
Construction	8	7	69	64	0	0
Wholesale Trade	51	20	13	5	0	0
Retail Trade	226	350	12	18	0	0
Accommodation and Food Services	231	141	99	60	0	0
Transport, Postal and Warehousing	17	13	67	53	0	0
Information Media and Telecommunications	6	0	0	0	0	0
Financial and Insurance Services	72	90	0	0	0	0
Rental, Hiring and Real Estate Services	82	0	0	0	0	0
Professional, Scientific and Technical Services	109	36	0	0	0	0
Administrative and Support Services	43	80	0	0	0	0
Public Administration and Safety	0	84	0	0	0	0
Education and Training	27	45	0	0	245	402
Health Care and Social Assistance	129	162	0	0	301	378
Arts and Recreation Services	31	23	0	0	0	0
Other Services	78	25	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 10.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Coffs Harbour LGA (presented in Table 10.16).

**Table 10.16**

Indicative Employment Density by Industry and Land Use Type - Coffs Harbour LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in Table 10.17.

**Table 10.17**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Coffs Harbour LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	40	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	290	320	16,200	18,000	0	0
Construction	230	210	10,340	9,530	0	0
Wholesale Trade	1,520	590	2,530	990	0	0
Retail Trade	9,040	14,000	1,660	2,580	0	0
Accommodation and Food Services	11,530	7,040	14,820	9,050	0	0
Transport, Postal and Warehousing	500	400	13,350	10,690	0	0
Information Media and Telecommunications	180	0	0	0	0	0
Financial and Insurance Services	1,810	2,260	0	0	0	0
Rental, Hiring and Real Estate Services	2,040	0	0	0	0	0
Professional, Scientific and Technical Services	2,730	910	0	0	0	0
Administrative and Support Services	1,080	1,990	0	0	0	0
Public Administration and Safety	0	2,090	0	0	0	0
Education and Training	1,090	1,790	0	0	12,230	20,110
Health Care and Social Assistance	5,150	6,490	0	0	18,040	22,700
Arts and Recreation Services	1,240	920	0	0	0	0
Other Services	3,140	990	0	0	0	0
<b>Total</b>	<b>41,570</b>	<b>40,000</b>	<b>58,900</b>	<b>50,880</b>	<b>30,270</b>	<b>42,810</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **41,570 sq.m of commercial, 58,900 sq.m of industrial and 30,270 sq.m of special use** of floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **40,000 sq.m of commercial, 50,880 sq.m of industrial and 42,810 sq.m of special uses** floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 10.18.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario an accurate depiction of likely actions and decisions made by businesses.

**Table 10.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Coffs Harbour LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	30	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	220	240	12,150	13,500	0	0
Construction	170	160	7,760	7,150	0	0
Wholesale Trade	1,140	450	1,890	740	0	0
Retail Trade	6,780	10,500	1,250	1,930	0	0
Accommodation and Food Services	8,650	5,280	11,120	6,780	0	0
Transport, Postal and Warehousing	380	300	10,010	8,020	0	0
Information Media and Telecommunications	140	0	0	0	0	0
Financial and Insurance Services	1,360	1,700	0	0	0	0
Rental, Hiring and Real Estate Services	1,530	0	0	0	0	0
Professional, Scientific and Technical Services	2,040	680	0	0	0	0
Administrative and Support Services	810	1,490	0	0	0	0
Public Administration and Safety	0	1,570	0	0	0	0
Education and Training	820	1,340	0	0	9,170	15,090
Health Care and Social Assistance	3,870	4,860	0	0	13,530	17,020
Arts and Recreation Services	930	690	0	0	0	0
Other Services	2,350	740	0	0	0	0
<b>Total</b>	<b>31,190</b>	<b>30,000</b>	<b>44,180</b>	<b>38,150</b>	<b>22,700</b>	<b>32,110</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicates **31,190 sq.m of commercial, 44,180 sq.m of industrial and 22,700 sq.m of special use** floorspace will be required by 2021.
- Over the ten years to 2031, demand for an additional **30,000 sq.m of commercial, 38,150 sq.m of industrial and 32,110 sq.m of special uses** floorspace is expected under the Alternative Scenario.

#### 10.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Coffs Harbour LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B1 Neighbourhood Centre 0.5-2.0:1
  - B2 Local Centre 1.0:1
  - B3 Commercial Core 0.8-4.5:1
  - B4 Mixed Use 1.0-3.0:1 and
  - B5 Business Development 0.5:1
  - B6 Enterprise Corridor 0.5-0.8:1
  - IN1 General Industrial 0.8:1
  - IN4 Working Waterfront 0.8:1
  - SP2 Infrastructure 1.5:1
  - SP3 Tourist 1:1
- As such, a FSR of 1.5:1 has been applied across all business zones, 0.8:1 for industrial uses and 1:1 for Special Uses.
- Based on derived floorspace requirements and these average floorspace ratios, MacroPlan Dimasi estimates around **4.1–5.4 hectares of commercial**, **10.3-13.7 hectares of industrial** and **5.5–7.3 hectares of special uses** land will be required by 2031.

**Table 10.19**  
Demand for Employment Land (2031) - Coffs Harbour LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	6.1 - 8.2	1.5	4.1 - 5.4
Industrial	8.2 - 11.0	0.8	10.3 - 13.7
Special Uses	5.5 - 7.3	1.0	5.5 - 7.3

Source: MacroPlan Dimasi

### 10.6.5 Demand for Retail Floorspace

The potential drivers of demand for retail floorspace in the future in the Coffs Harbour LGA are summarised below:

- Population growth – which is expected to be strong, growing at an average of 1.1% per annum to 2031 (a net increase of 24.2% or 17,150 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 10.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Coffs Harbour LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 10.20 shows the following:



- The residential population of the Coffs Harbour LGA generates approximately **149,100 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **60,400 sq.m** by 2031, an increase of about **37%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **19,620 sq.m**, and is expected to increase by about **5,300 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **12.1 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

**Table 10.20**  
Coffs Harbour LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	73,710	75,550	80,050	84,250	88,100	1.1%
Tourism equiv. pop	7,082	7,259	7,691	8,095	8,465	1.1%
<b>Retail exp. (\$M)</b>						
Food & liquor	408	425	469	518	569	2.0%
Food catering	106	111	124	139	154	2.2%
Apparel	80	82	89	95	102	1.5%
Household	153	158	170	184	196	1.5%
Leisure	43	45	49	53	58	1.7%
General	70	73	81	90	100	2.1%
Retail services	<u>24</u>	<u>25</u>	<u>27</u>	<u>30</u>	<u>32</u>	<u>1.7%</u>
<b>Total</b>	<b>884</b>	<b>918</b>	<b>1,010</b>	<b>1,109</b>	<b>1,211</b>	<b>1.9%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	45,335	47,176	52,166	57,600	63,188	2.0%
Food catering	17,657	18,465	20,672	23,110	25,667	2.2%
Apparel	14,482	14,921	16,094	17,335	18,550	1.5%
Household	51,108	52,656	56,797	61,175	65,465	1.5%
Leisure	7,184	7,439	8,124	8,860	9,600	1.7%
General	11,620	12,128	13,511	15,030	16,611	2.1%
Retail services	<u>4,028</u>	<u>4,171</u>	<u>4,555</u>	<u>4,967</u>	<u>5,382</u>	<u>1.7%</u>
<b>Total</b>	<b>149,095</b>	<b>154,814</b>	<b>170,290</b>	<b>187,070</b>	<b>204,211</b>	<b>2.0%</b>
<b>Floorspace per capita</b>	<b>2.02</b>	<b>2.05</b>	<b>2.13</b>	<b>2.22</b>	<b>2.32</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	7,082	7,259	7,691	8,095	8,465	1.1%
Floorspace per capita	<u>2.02</u>	<u>2.05</u>	<u>2.13</u>	<u>2.22</u>	<u>2.32</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>14,325</b>	<b>14,875</b>	<b>16,362</b>	<b>17,974</b>	<b>19,621</b>	<b>1.9%</b>
<b>Total retail demand (sq.m)</b>	<b>163,420</b>	<b>169,688</b>	<b>186,652</b>	<b>205,044</b>	<b>223,832</b>	<b>1.9%</b>
<b>Demand growth (14-31)</b>					<b>60,411</b>	
<b>Estimated land take (ha)</b>					<b>12.1</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 10.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Coffs Harbour LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land out to 2031.

Key findings pertaining to our gap assessment are presented in Table 10.21.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	196.9	53.4	0.0	53.4	16.9	36.5
Industrial	326.6	75.0	52.0	127.0	12.0	115.0
Special Uses	465.9	329.0	0.0	329.0	6.4	322.6

Source: MacroPlan Dimasi

- Overall, there is sufficient land available in Coffs Harbour to accommodate future employment needs out to 2031.
- Over the forecast period it is estimated:
  - *Supply of business land will exceed demand by 36.5 hectares*
  - *Supply of industrial land will exceed demand by 115.0 hectares*
  - *Supply of special uses land will exceed demand by 322.6 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Coffs Harbour LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Coffs Harbour LGA, particularly for new and emerging industries.

## 10.8 Conclusions

### 10.8.1 Commercial, Industrial and Special Uses

Population growth within the Coffs Harbour LGA has been solid, expanding by 4,315 persons over the five years to 2011. This rate of growth meant that the total resident population of the LGA was 71,798 at 2011, making it the third most populous LGA within the region.

By age, population growth has been dominated by older age cohorts, with persons aged 50-64 and 65+ increasing by 2,031 and 1,754 persons respectively. At the same time, modest population gains were recorded for the 0-19 and 20-34 age cohorts, while a population loss of 447 persons was recorded for the 35-49 age cohort. The LGA's population growth has been underpinned by migration, with a net gain of 3,441 persons between 2006 and 2011. Overseas migration constituted the largest migration gain (+1,728 persons) over the period, while there was a significant net gain from persons previously living in Sydney (+1,103 persons).

The employment structure within Coffs Harbour was skewed to population driven industries. As at 2011, the top four employing industries in the LGA are Health Care and Social Assistance (17.2%), Retail Trade (14.7%), Accommodation and Food Services (10.3%) and Education and Training (9.4%). Given that Coffs Harbour is a major centre, the LGA has a high rate of job containment (82.6%).

In line with solid population growth, employment growth has followed suit with an additional 1,581 jobs created over the five years to 2011. Consistent with national trends, employment growth was most pronounced in Health Care and Social Assistance (+968). Furthermore, the LGA's strong presence of Public Administration and Safety jobs has continued with an additional 252 jobs created.

On the other hand, a contraction in employment was recorded for seven industries. The largest employment loss was recorded in Retail Trade (-191), Manufacturing (-141) and Accommodation and Food Services (-94).

Facilitated by the Coffs Harbour Regional Airport, Coffs Harbour is a popular tourist destination on the New South Wales North Coast. However, similar to other tourist destinations, tourism numbers have been hampered by the buoyant Australian Dollar which has made international travel an attractive proposition. To Coffs Harbour's benefit, a weaker Australian Dollar in coming years will boost visitation to the area, thereby having a pronounced impact on direct industries – Retail Trade, Accommodation and Food Services and Arts and Recreation Services.

Key economic and demographic drivers and associated outcomes for the Coffs Harbour LGA include:

- DPE projections indicate the high rate of population growth in the Coffs Harbour LGA will persist over the forecast period (1.1% per annum out to 2031). While most pronounced in 65+ persons, growth in traditional working age cohorts is expected to be solid.
- A large and diverse employment base will make the LGA an attractive option for those seeking a coastal lifestyle.
- Health Care and Social Assistance to contribute the bulk of employment growth over the forecast period.
- Weaker Australian Dollar to boost tourism visitation to the LGA.

Our projections of demand indicate **61,190–81,570 sq.m of commercial, 60,411 sq.m of retail, 82,330–109,780 sq.m of industrial** and **54,810–73,080 sq.m of special use** floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around **4.1–5.4 hectares of commercial, 12.1 hectares of retail, 10.3-13.7 hectares of industrial** and **5.5–7.3 hectares of special uses** land will be required by 2031.

Overall, there is sufficient land available in Coffs Harbour to accommodate future employment needs out to 2031. It is estimated:

- *Supply of business land will exceed demand by 36.5 hectares*
- *Supply of industrial land will exceed demand by 115.0 hectares*
- *Supply of special uses land will exceed demand by 322.6 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Coffs Harbour LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Coffs Harbour LGA, particularly for new and emerging industries.

### **10.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Coffs Harbour LGA:

- The Coffs Harbour LGA has a well-established retail/commercial centres hierarchy that services the existing residents and tourists, reasonably well.
- Future population growth is expected to be strong, averaging about 1.1% per annum over the period to 2031, an increase of about 24% on current levels, or an additional 17,150 persons.
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 60,400 sq.m (a 37% uplift) by 2031, equating to a land requirement of about 12.1 hectares.

- Existing retail demand is estimated at 163,400 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 2,667,447 sq.m. However because the retail offer in Coffs Harbour is superior to that in surrounding LGAs, we estimate a net inflow of expenditure of about 10% into the LGA, resulting in net demand of about 179,800 sq.m, increasing to 246,200 sq.m by 2031.
- Coffs Harbour Council's focus over the next 10 – 20 years is to ensure the rejuvenation of Coffs City Centre to ensure that its primacy is maintained, and it becomes a stronger, major regional centre.
- Council strategic policies indicated that there was sufficient business zoned land to accommodate future expected retail floorspace growth. The 2006 Council retail strategy (referred to in RCHBCH) identified future demand growth around 100,000 sq.m over period 2006 – 2031, including 75,000 sq.m that could be allocated to the Coffs Harbour City Centre and additional growth could be absorbed in the Toormina and Woolgoolga town centres.
- The RCHBCH recommends that no out of centre development should be supported, in order to protect the integrity of the Coffs Harbour City Centre and other key centres.
- Council considers there is sufficient stock of appropriate land for bulky goods retailing across the LGA, and discourages traditional retailing in bulky goods zoned precincts, to ensure that existing retail centres are protected.
- The combination of population and tourism growth expected to occur within Coffs Harbour, and the regional role played by the retail facilities in Coffs Harbour, leading to captured retail expenditure from other municipalities, means that there is likely to be a shortfall in the capacity of the available Business zoned land to meet future demand for retail and commercial floorspace.
- While future development activity should be focused in the existing Business zoned land wherever possible, we consider that additional land should be identified to meet future demand.

## Section 11: LGA Analysis – Bellingen

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Bellingen LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Bellingen LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Bellingen LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from DP&E and Bellingen Shire Council.

### 11.1 Key facts, findings and take-outs

#### 11.1.1 Population growth

- Between 2006 and 2011, population growth in the Bellingen LGA was weak, expanding by just 207 persons.
- During this period, population growth in 50+ persons offset a contraction in young adults.



- Over the five years to 2011, net migration to Bellingen LGA totalled 141 persons, supported by a net inflow from Sydney (+334 persons).
- DPE projections indicate the resident population in the Bellingen LGA will contract over the forecast period (-0.9% per annum out to 2031).

### 11.1.2 Employment trends

- As at 2011, the Bellingen LGA supported 3,271 jobs, accounting for less than 2% of jobs in the North Coast.
- Around 44% of the LGA's total workforce is engaged in service related industries, reflecting a strong link between population growth and employment opportunity.
- Just 56.7% of Bellingen's working residents also work in the LGA. According to Census 2011, 43.3% of the LGA's work residents travel either to other North Coast LGAs (28.8%) or locations outside the North Coast (14.5%) for work.
- Between 2006 and 2011, employment growth in the Bellingen LGA was negligible, increasing by 14 jobs.
- Job additions was most pronounced in Construction (+53 jobs), followed by Public Administration and Safety (+36 jobs), Professional, Scientific and Technical Services (+26 jobs) and Health Care and Social Assistance (+23 jobs).

### 11.1.3 Employment land

- In Bellingen LGA, there are 104 hectares of land zoned for urban employment purposes – comprising of 21% Business, 69% Industrial and 10% Special Uses.
- Following 14 job additions between 2006 and 2011, employment in the Bellingen LGA is projected to increase over the forecast period. Over the 2011 to 2031 period, it is expected the workforce will expand by a total of 81 jobs.
- As such, our estimates of demand indicate **3,580–4,780 sq.m of commercial, 3,936 sq.m of retail, 6,800–9,050 sq.m of industrial and 2,230–2,980 sq.m of special use** floorspace will be required by 2031.

- Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **0.4–0.5 hectares of commercial, 1.1–1.5 hectares of industrial and 0.3-0.4 hectares of special uses** land will be required by 2031.
- Our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Bellingen LGA (out to 2031). Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 2.1 hectares*
  - *Supply of industrial land will exceed demand by 52.1 hectares*
  - *Supply of special uses land will exceed demand by 2.2 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Bellingen LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Bellingen LGA, particularly for emerging businesses and industries.
- It is recognised that the Bellingen LGA will need to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 3.4 hectares and 1.5 hectares respectively available for development beyond 2031).
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Bellingen LGA.

- It is believed some future demand for health service purposes could be accommodated by employment and residential zones.

## 11.2 Literature review

Bellingen Economic Tourism Development Plan 2010 (BETDP), and the Bellingen Shire Employment Lands Strategy 2013 (BSELS), which is an addendum to the Bellingen Shire Growth Management Strategy 2007 have been reviewed. The BSELS was adopted by Council in February 2013 and was partially endorsed by the NSW Department of Planning and Environment in July 2013. The BETDP is a 5 year plan that aims to prioritise and maximise opportunities from economic development in the Shire. The Growth Management strategy provides a framework for planning future development to 2026.

We note the following key points:

- The BSELS focuses on employment lands in Bellingen Shire which may be defined as land that is predominantly used for retail, commercial or industrial activities resulting in employment. Accordingly the Strategy focuses on land zoned for industrial uses, retail and commercial office uses.
- The BSELS outlines that prospective employment generating sites should complement and/or cluster with existing employment generating uses to provide a greater array of services in the Shire and diversity of job types whilst minimising the need for residents and workers to travel.
- The BSELS concluded with the following recommendations;
  1. The Bellingen Shire should provide an array of employment lands with varying characteristics, suitability's and timeframes for availability servicing the Shire's main centres whilst accommodating the expansion of existing, or attraction of new businesses.
  2. The Shire needs to recognise that some existing industrial precincts may not be able to achieve the full scale of land anticipated on account of ownership and development and site/infrastructure constraints.
  3. The Council needs to identify sites for future growth and supply to facilitate a range of opportunities and to moderate land prices.

4. The Council should identify initial areas for investigation and where appropriate zoning as industrial land. It is important to note that the suitability and take up of any land subsequently rezoned as IN1 General Industrial (or currently zoned as IN1 General Industrial) should be monitored over a 5 year period. Dependant on the outcome of this period and competing demand for land within the Shire, Council may consider it appropriate to rezone the land back to its prior use or an alternative use to meet local demand and policy objectives.
- The Growth Management Strategy identifies commercial and industrial development potential in Bellingen, Urunga and Dorrigo.
  - The BETDP identifies the top priorities for economic development in tourism (events), agribusiness, design and technology and eco products.
  - The plan states the overarching issue in Urunga and Bellingen is lack of employment land due to constraints from flooding, so there is a need to shift focus from industrial land and focus on tourism, creative industries and hospitality.
  - The plan also flags Waterfall Way for upgrades to improve access to tourism areas, transport of goods and access to health and education.

### **11.3 Socio-demographic trends**

#### **11.3.1 Population change**

- According to ABS ERP figures, the Bellingen LGA resident population was 12,923 as at 2011.
- Population growth averaged 41 persons per annum over the five years to 2011.

**Table 11.1**  
**Estimated Resident Population (persons) - Bellingen LGA**

Year	Estimated Resident Population	Total Change (persons)
2001	12,634	
2006	12,716	82
2011	12,923	207

Source: ABS

- Population growth over this period was most pronounced within the older age cohorts. Between 2006 and 2011, the population in the 50-64 age cohort increased by 344 persons, while the retiree age cohort (65+) expanded by 242 persons.
- Population growth in key working age cohorts (20-34 and 35-49) was low; particularly within persons aged 35-49, where a population reduction was recorded.

**Table 11.2**  
**Population By Age (persons) - Bellingen LGA**

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	3,417	3,334	-83	26%
20-34	1,336	1,395	59	11%
35-49	2,865	2,510	-355	19%
50-64	2,830	3,174	344	25%
65+	2,268	2,510	242	19%
<b>Total</b>	<b>12,716</b>	<b>12,923</b>	<b>207</b>	<b>100%</b>

- The data indicates the resident population of Bellingen LGA is ageing rapidly, which will place strain on future labour sources - particularly as aged persons retire from the workforce.

### 11.3.2 Migration movements

Inward and outward movements for the Bellingen LGA have been analysed, using 2006 and 2011 Census data (Place of Usual Residence).

- In the five years to 2011, net migration to Bellingen totalled 141 persons.
- The main component of net migration to Bellingen came from persons previously living in Sydney (+334 persons). On the other hand, there has a considerable net loss in migration to adjoining LGAs within the Mid North Coast (-266 persons)
- By age, those aged between 35-49 years recorded the largest net gain in migration (+234 persons), while there was a moderate net loss of persons aged 20-34 (-233 persons).

Table 11.3

Net Migration by Age - Bellingen LGA

Region	0-19	20-34	35-49	50-64	65+	Total
Mid North Coast	-44	-67	-23	-46	-86	-266
Sydney	19	13	160	130	12	334
Regional NSW	26	-76	12	5	41	8
Interstate	-13	-164	24	11	-11	-153
Overseas	60	61	61	31	5	218
<b>Total Net Migration</b>	<b>48</b>	<b>-233</b>	<b>234</b>	<b>131</b>	<b>-39</b>	<b>141</b>

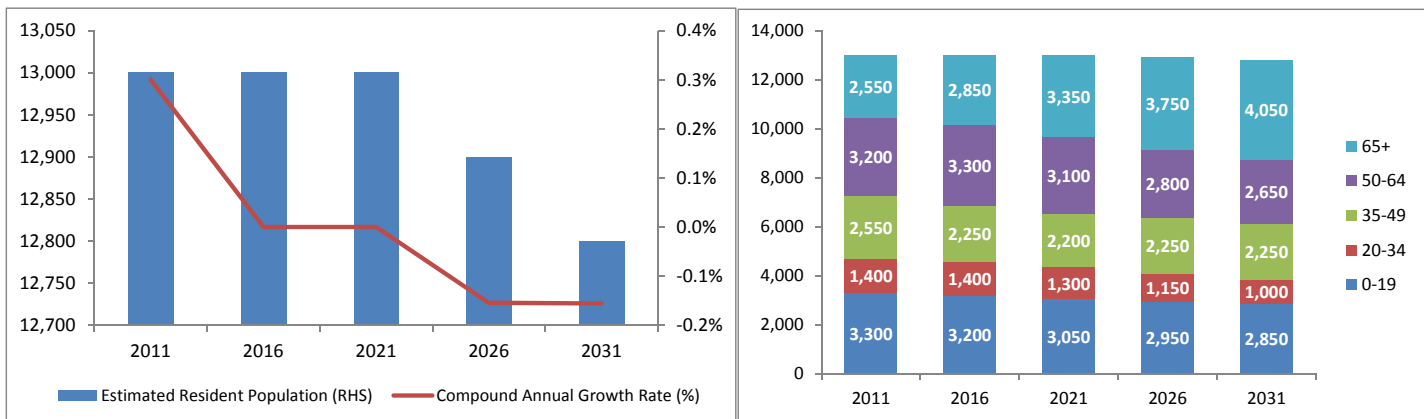
Source: ABS

### 11.3.3 Population projections

- According to 2014 population projections, the Bellingen LGA population is projected to contract to 12,800 persons by 2031, decreasing by -0.04% per annum.
- The local population is expected to remain relatively stable out to 2021, with a base population of around 13,000 as at 2021.
- Thereafter, Bellingen's population is expected to reduce by 20 persons per annum over the decade to 2031.

- Growth in working residents (i.e. persons aged 20-34 and 35-49) is expected to be negative out to 2031.
- On the other hand, population growth is only expected to occur amongst persons aged 65+, with an additional 1,500 persons expected over the forecast period.
- This outlook suggests that additional workers will be required to supplement the retirement of the aged workforce. The retention of persons aged 20-34 is key for the Bellingen LGA to avoid labour shortages.
- Furthermore, the region’s aged demographic structure is expected to result in increased demand for localised health services.

**Figure 1. Projected Population (2011 to 2031)**



Source: DP&E MacroPlan Dimasi

### 11.3.4 Labour force status

- Of all residents, around 81% in the Bellingen LGA were aged 15+ years.
- According to Census data, labour force participation from those aged 15 years and above was approximately 53% i.e. 5,188 of 9,736 residents<sup>10</sup>.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking working).

<sup>10</sup> ABS Census of Population and Housing

- The Bellingen LGA's employment rate is consistent with that observed for the broader North Coast region (92%).

**Table 11.4**  
**Labour Force Status by Age (number) - Bellingen LGA**

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	259	64	323	466	789
20 - 29	460	84	544	244	788
30 - 39	700	64	764	315	1,079
40 - 49	1,286	91	1,377	349	1,726
50 - 59	1,454	88	1,542	544	2,086
60 - 69	526	18	544	1,118	1,662
70 - 79	77	5	82	937	1,019
80 - 84	12	0	12	279	291
85+	0	0	0	296	296
<b>Total</b>	<b>4,774</b>	<b>414</b>	<b>5,188</b>	<b>4,548</b>	<b>9,736</b>

*Source: Census of Population and Housing (2011)*

### 11.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Bellingen LGA.
- According to Census data, around 56.7% employed residents of Bellingen LGA also worked within the LGA.
- The remaining 43.3% of working residents travel either to other North Coast LGAs (28.8%) or locations outside the North Coast (14.5%) for work.
- Popular workplace destinations for working residents who travel to other North Coast LGAs include Coffs Harbour (24.8%) and Nambucca (3.0%) LGAs.
- The rate of job-containment in Bellingen LGA is marginally lower than observed in other North Coast LGAs.



**Table 11.5**  
**Job Containment - Bellingen LGA**

	<b>Value</b>
Working residents	4,721
<u>Place of Work (number)</u>	
Bellingen	2,679
North Coast LGAs (ex. Bellingen)	1,358
Outside North Coast	684
<b>Total</b>	<b>4,721</b>
<u>Job Containment (%)</u>	
Bellingen	56.7%
North Coast LGAs	28.8%
Other	14.5%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The rate of job containment by industry classification for Bellingen LGA is presented in the next table.
- Relative to the all industries average in the Bellingen LGA (56.7%), nine industries achieved a higher rate of job containment.
- The three highest containing industries include Agriculture, Forestry and Fishing industry (86.0%), Rental, Hiring and Real Estate Services (72.4%) and Accommodation and Food Services (71.7%).
- With the exception of Agriculture, Forestry and Fishing, Wholesale Trade and Manufacturing, high job containing industries are predominantly service-denominated.

Table 11.6  
Job Containment by Industry - Bellingen LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Agriculture, Forestry and Fishing	86.0%	5.2%	8.8%	100.0%
Rental, Hiring and Real Estate Services	72.4%	27.6%	0.0%	100.0%
Accommodation and Food Services	71.7%	18.4%	9.9%	100.0%
Other Services	69.7%	21.9%	8.4%	100.0%
Manufacturing	69.2%	18.9%	11.9%	100.0%
Professional, Scientific and Technical Services	68.6%	21.4%	10.0%	100.0%
Arts and Recreation Services	65.9%	14.6%	19.5%	100.0%
Retail Trade	62.9%	31.3%	5.8%	100.0%
Wholesale Trade	60.5%	31.6%	7.9%	100.0%
<b>Across all industries</b>	<b>56.7%</b>	<b>28.8%</b>	<b>14.5%</b>	<b>100.0%</b>
Financial and Insurance Services	55.0%	35.0%	10.0%	100.0%
Public Administration and Safety	51.5%	39.3%	9.2%	100.0%
Transport, Postal and Warehousing	48.6%	26.4%	25.0%	100.0%
Administrative and Support Services	46.7%	18.4%	34.9%	100.0%
Health Care and Social Assistance	46.1%	44.4%	9.5%	100.0%
Electricity, Gas, Water and Waste Services	45.2%	47.6%	7.1%	100.0%
Education and Training	42.8%	49.0%	8.3%	100.0%
Information Media and Telecommunications	39.0%	39.0%	22.0%	100.0%
Construction	35.5%	18.6%	46.0%	100.0%
Mining	23.8%	0.0%	76.2%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 11.4 Employment and labour market trends

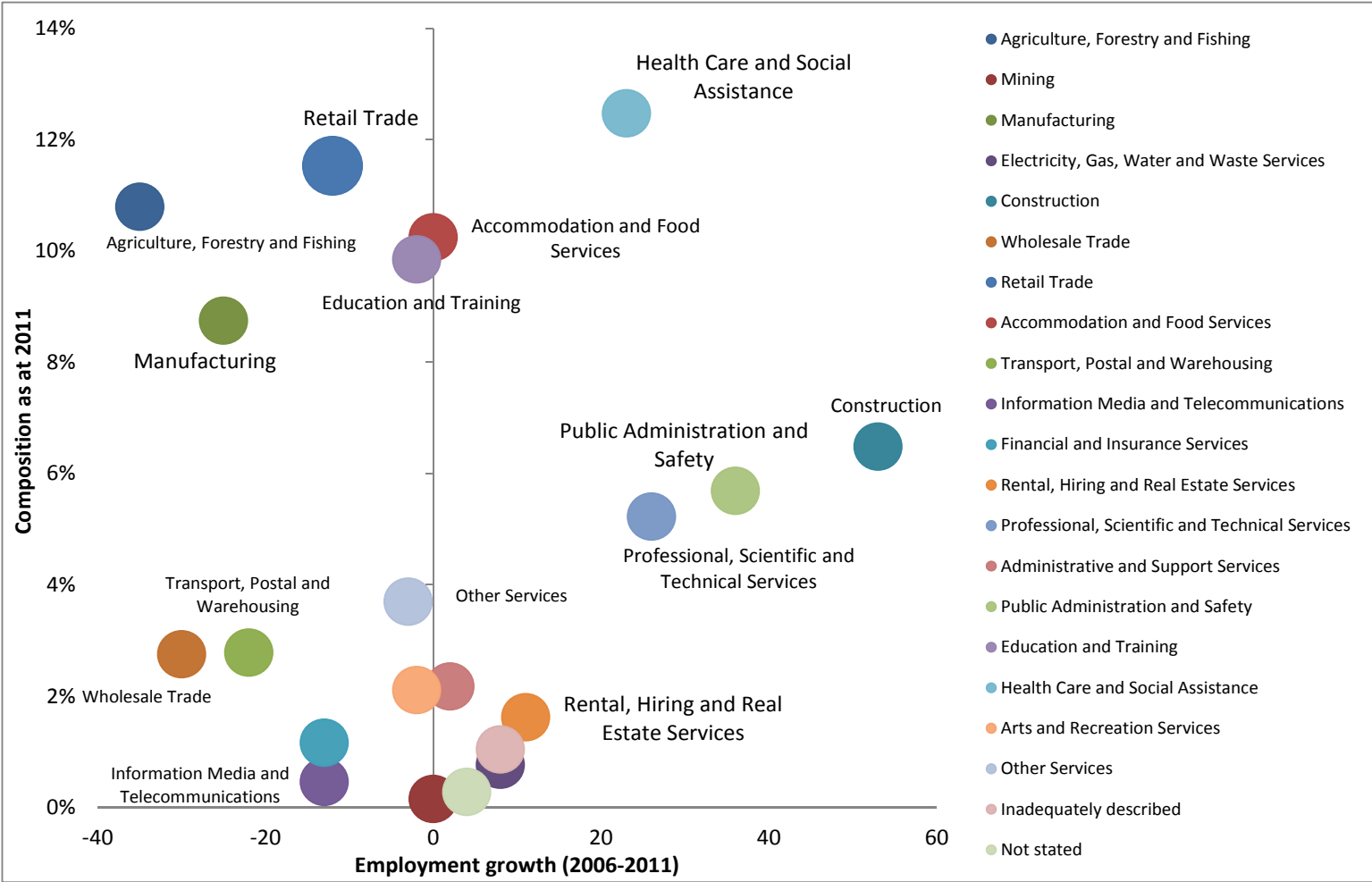
### 11.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Bellingen LGA and identify emerging trends and drivers that have 'shaped' and influenced its workforce between 2006 and 2011.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Bellingen LGA supported 3,271 jobs, accounting for just 1.8% of total jobs in the North Coast (NC) region.
- Health Care and Social Assistance represented the largest employing industry in the LGA – it engaged 12.5% of the LGA's workforce in 2011. Retail Trade (11.5%), Agriculture, Forestry and Fishing (10.8%), Accommodation and Food Services (10.2%) and Education and Training (9.8%) were the next four largest employing industries, reflecting a service bias in the LGA's employment

structure. Moreover, agriculture and tourism play an employment role in supporting employment in the Bellingen LGA. Overall, this employment structure is similar to the broader NC region.

- Around 44% of the LGA's total workforce is engaged in service industries, reflecting a strong link between population growth and employment opportunity. Employment in the service industries is strongly influenced by the level and type of population growth. For instance, the increasingly ageing characteristic of Bellingen's population is expected to consolidate the current emphasis on Health Care and Social Assistance as a major employer.
- However, the industry composition remains skewed to primary industries and traditional value-add industries such as construction and manufacturing. From an employment perspective, representation in the Agriculture, Forestry and Fishing industry is significant (10.8% compared to just 4.7% for the North Coast region).
- Employment in white collar industries (19.6%) is on par with the North Coast region average (20.6%).
- Over the five years to 2011, just 14 new jobs were created in the Bellingen LGA.
- Over the period jobs growth was most pronounced in Construction (+53 jobs), Public Administration and Safety (+36 jobs), Professional, Scientific and Technical Services (+26 jobs) and Health Care and Social Assistance (+23 jobs).
- At the same time, ten industries registered a decline in employment, with the greatest reductions incurred in Agriculture, Forestry & Fishing (-35 jobs), Wholesale Trade (-30 jobs) and Manufacturing (-25 jobs).
- Overall, these trends align with the broader North Coast region; however, employment growth across the region was greatest within the Health Care and Social Assistance industry, while growth in the Construction industry was subdued.

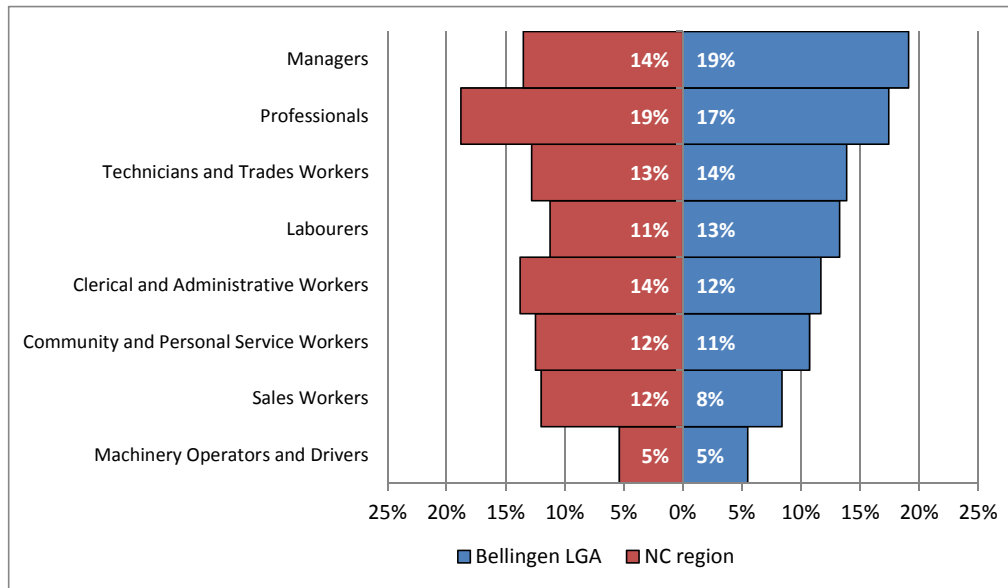
Figure 2. Employment composition and growth by industry, Bellingen LGA



### 11.4.2 Occupation profile

- As at Census 2011 the dominant occupation category for workers in Bellingen LGA was 'Managers', accounting for around 19% of the LGA's workforce, followed by 'Professionals' (17%).

Figure 3. Occupation Composition (2011)



Source: ABS, MacroPlan Dimasi

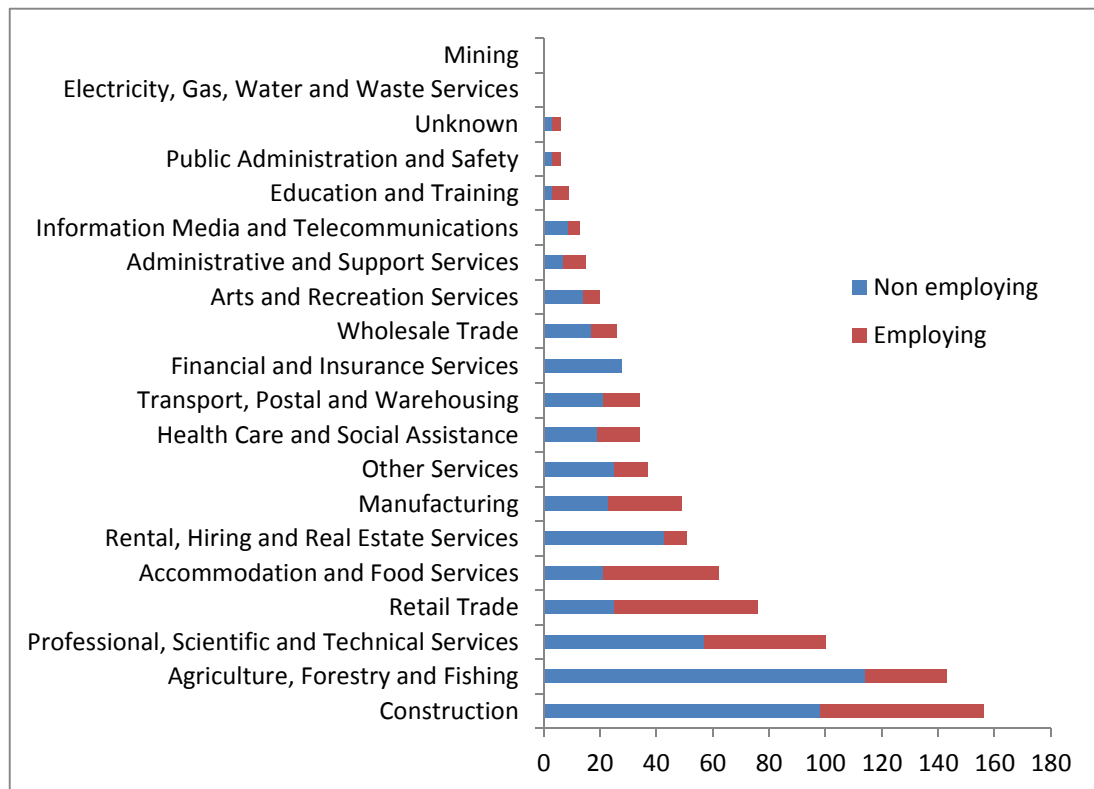
- In comparison to the broader North Coast region, Bellingen has a larger skew to Managers while the general North Coast region has a greater proportion of workers employed in a Professional capacity.
- There are fewer workers employed as 'Sales Workers' in the Bellingen LGA.

### 11.4.3 Business composition & change

- As at June 2011, there were 865 businesses operating within the Bellingen LGA, with 61% non-employing or sole traders.
- By industry, businesses in the Construction industry account for the majority (156 in total), followed by Agriculture, Forestry and Fishing (143 in total) and Professional, Scientific and Technical Services (100 in total).

- Despite being the highest employing industry, business representation in the Health Care and Social Assistance industry is moderate (15 employing businesses).
- There were no businesses employing 200 or more persons within the Bellingen LGA.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, business growth within the Bellingen LGA was negligible.
- Over the period, a 35 employing business increase coincided with a 35 reduction in non-emplying businesses.
- By industry, Retail Trade (-17) and Agriculture, Forestry and Fishing (-14) incurred the largest business count reduction. In contrast, growth was most pronounced in the Manufacturing (+17) and Accommodation and Food Services (+13) industries.

- Interestingly, growth in the number of Manufacturing businesses contrasts the employment outcome for this industry over the 2006-2011 period.

**Table 11.7**  
**Business Composition and Change - Bellingen LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	11	-11	0
Retail Trade	-3	-14	-17
Accommodation and Food Services	-4	17	13
Education and Training	0	-6	-6
Construction	-12	4	-8
Public Administration and Safety	0	0	0
Manufacturing	4	13	17
Professional, Scientific and Technical Services	-6	-2	-8
Other Services	-5	8	3
Transport, Postal and Warehousing	-5	15	10
Agriculture, Forestry and Fishing	-16	2	-14
Administrative and Support Services	-3	6	3
Wholesale Trade	6	0	6
Rental, Hiring and Real Estate Services	-8	-3	-11
Financial and Insurance Services	5	-3	2
Arts and Recreation Services	-4	0	-4
Electricity, Gas, Water and Waste Services	0	0	0
Information Media and Telecommunications	4	3	7
Mining	-	-	0
Not Classified	1	6	7
<b>Total</b>	<b>-35</b>	<b>35</b>	<b>0</b>

*Source: ABS*

#### 11.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- The current employment structure of the Bellingen LGA has a clear skew towards those employed within the population driven industries. However, as population growth slows, so too does jobs growth in these sectors.
- Looking ahead, population growth within the Bellingen LGA is expected to be most pronounced within persons aged 65+. This in turn is likely to have two effects on the labour market within Bellingen – high retirement of the workforce and higher demand for medical services.

- The effects of weaker growth within the Manufacturing industry are already beginning to become evident, reflective in an employment loss of 25 over the 2006 to 2011 period. This trend is likely to continue.

## 11.5 Employment Land Supply

### 11.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Bellingen LGA.
- In the Bellingen LGA, there are three employment land use categories, namely Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each specific land zone type.

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	0.2	0%
	B2. Local Centre	22.2	21%
	<b>Total</b>	<b>22.4</b>	<b>21%</b>
Industrial	IN1. General Industrial	73.2	69%
	<b>Total</b>	<b>73.2</b>	<b>69%</b>
Special Uses	SP2. Infrastructure	10.6	10%
	<b>Total</b>	<b>10.6</b>	<b>10%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>106.2</b>	<b>100%</b>

Source: NSW Department of Planning and Environment (2014)

- Overall, there are approximately 106.2 hectares of zoned urban employment land in the Bellingen LGA.
- Around 69% of this is zoned for industrial purposes. Of the remaining zoned employment land, 21% is assigned for Business and 10% for Special uses.
















- Within the two designated business zones (B1 and B2), the majority is zoned B2 Local Centre (22.2 hectares).

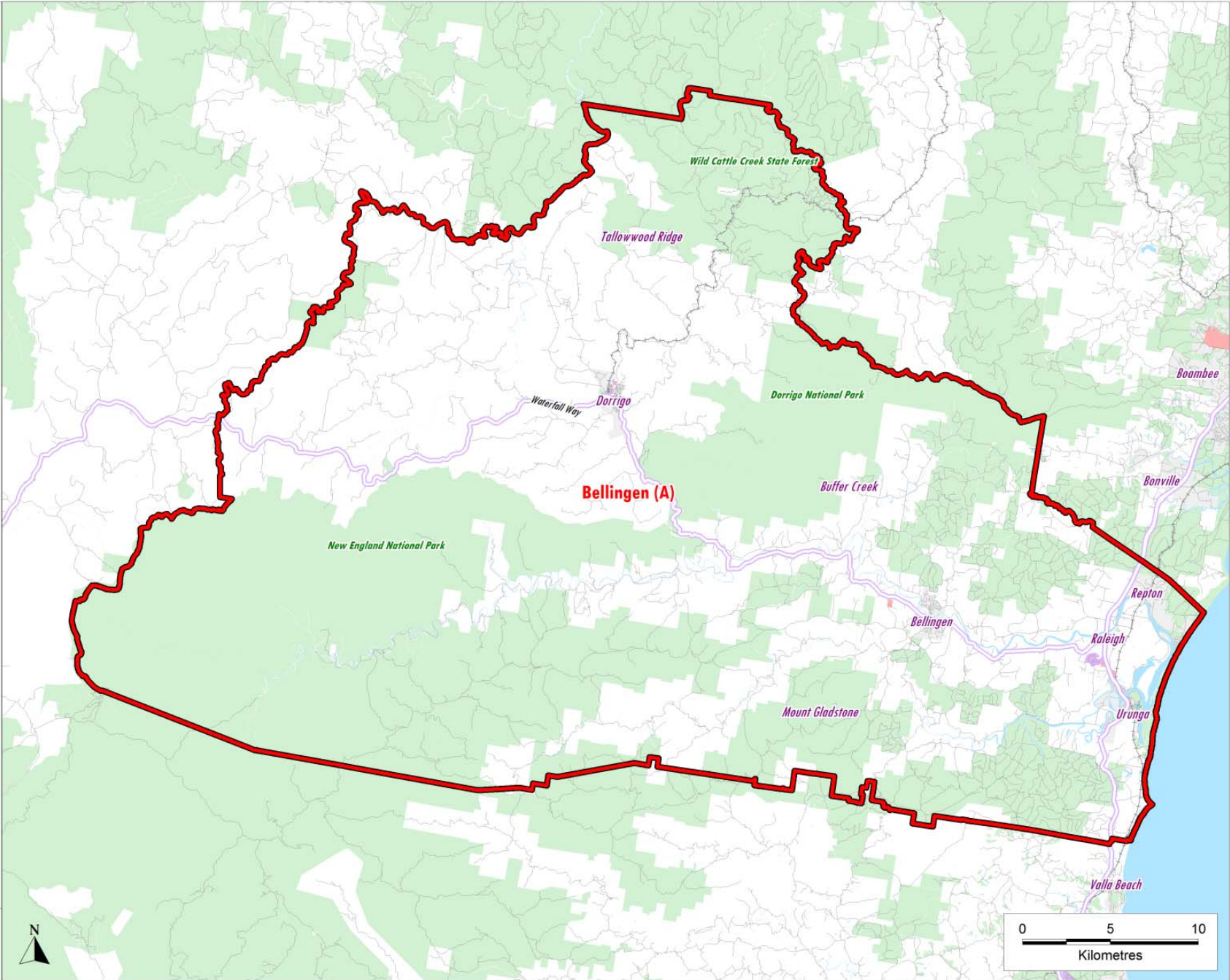
# Map 11.1

## Bellingen Shire Council

### Employment Land Zones

#### Legend \*

-  Bellingen Shire Council Boundary
  
- Land Zones**
-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



# Map 11.2

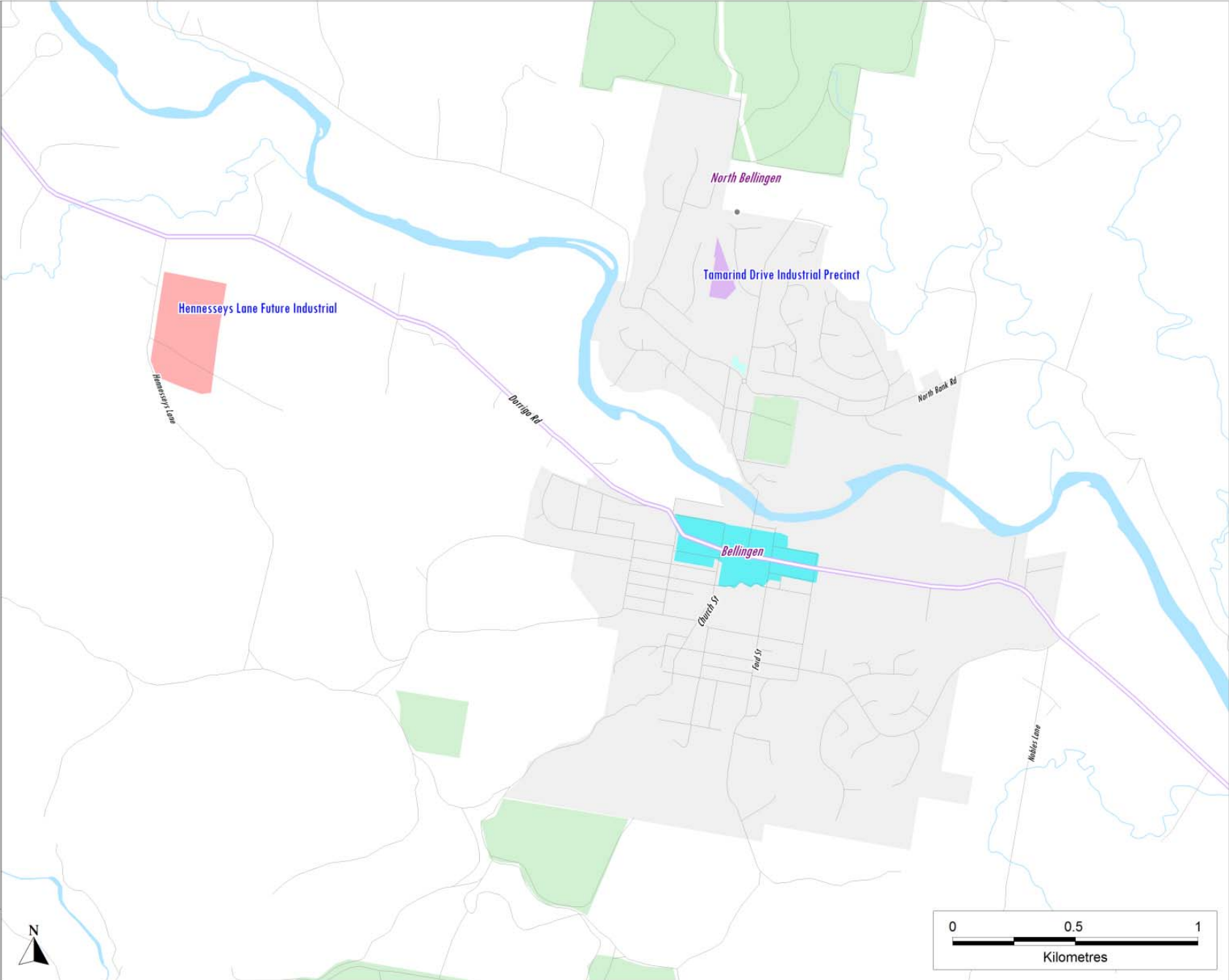
## Bellingin

### Employment Land Zones

#### Legend \*

#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



# Map 11.3













## Dorrigo

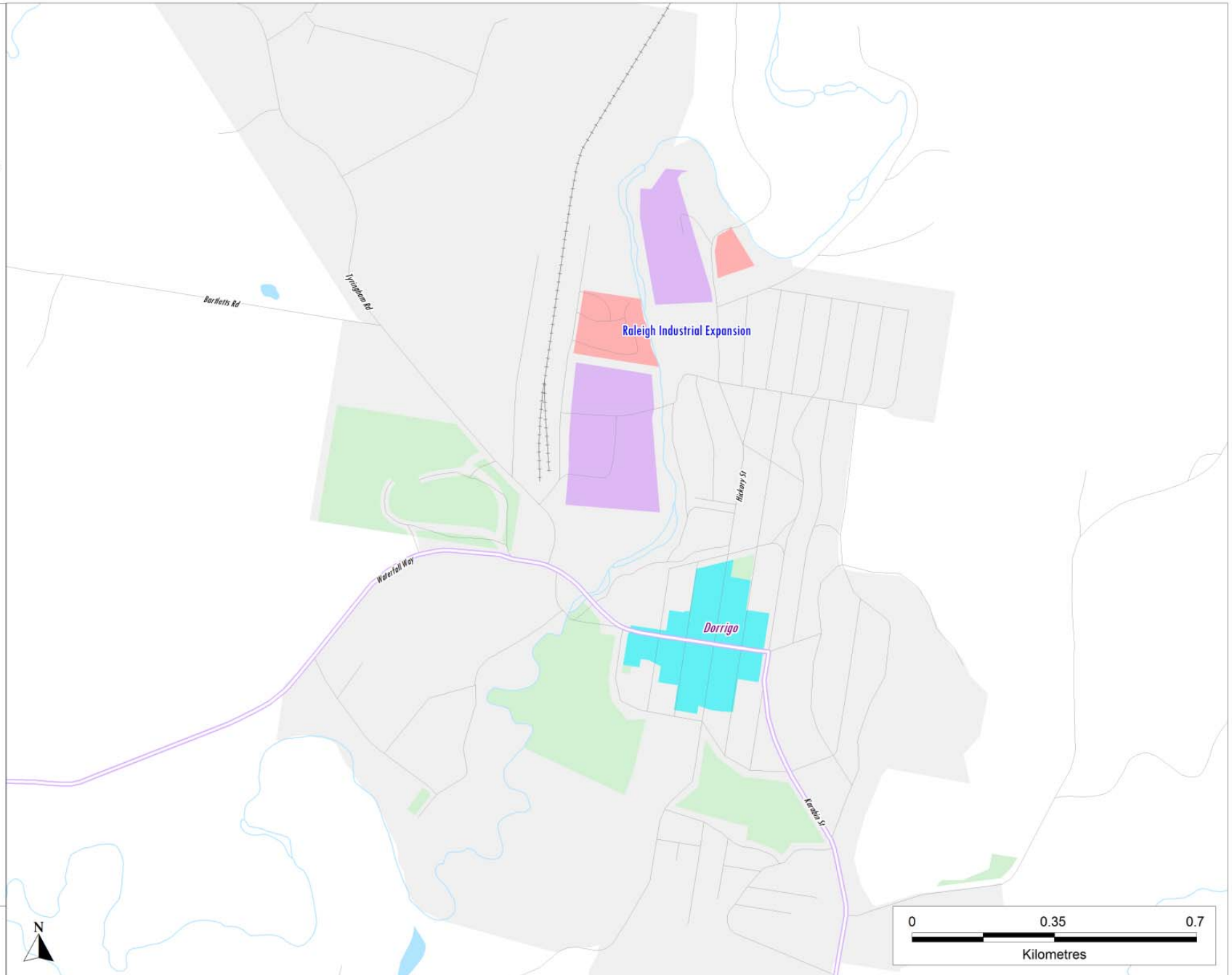
### Employment Land Zones

#### Legend \*

 Bellingen Shire Council Boundary

#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





# Map 11.4

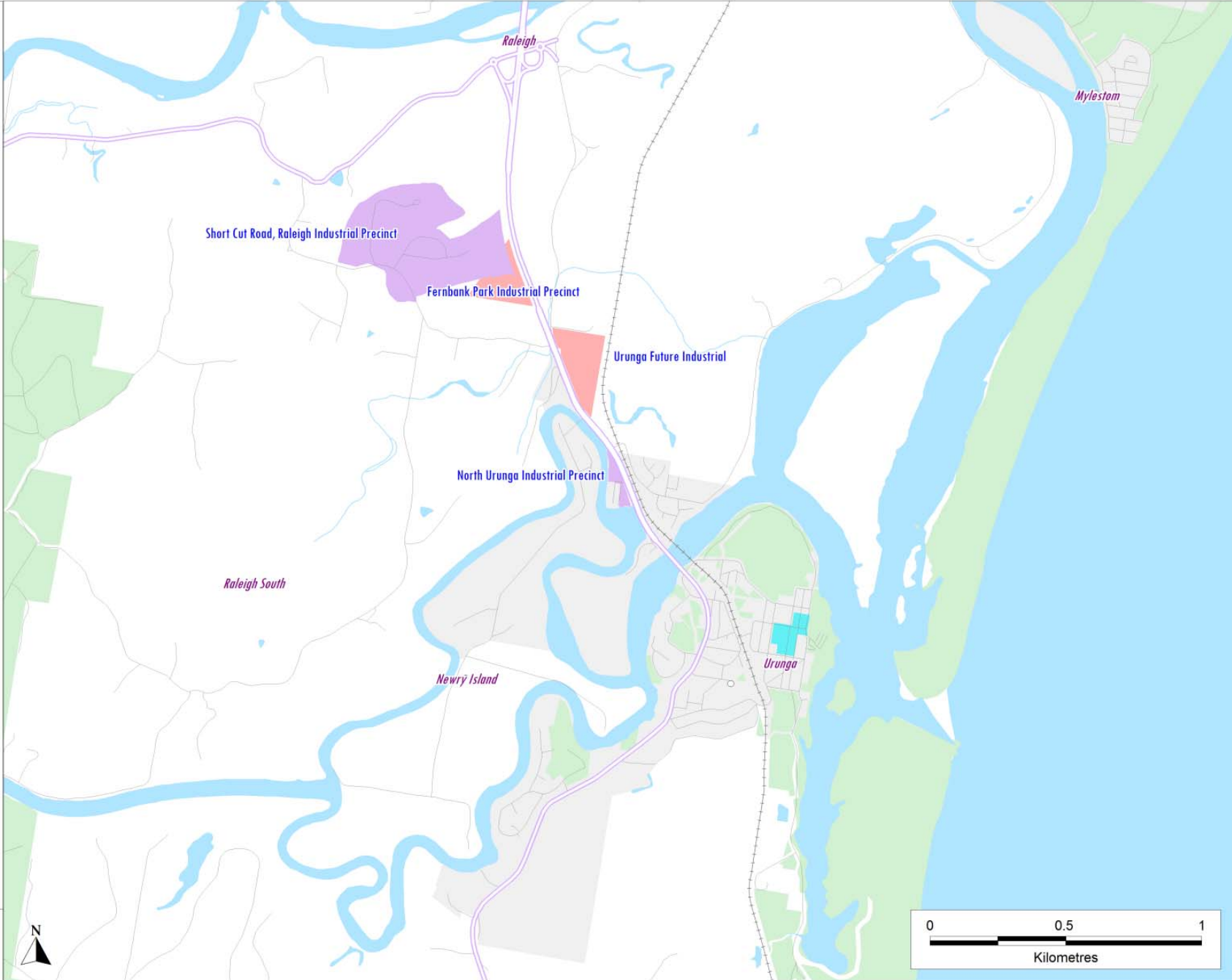
## Raleigh & Urunga

### Employment Land Zones

Legend \*

Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 11.5.2 Industrial – Existing supply

- There is just one industrial land use zone used in the Bellingen LGA i.e. IN1 General Industrial.
- Currently, there are three industrial precincts in the LGA (as presented below).

**Table 11.9**  
Established Industrial Precincts - Bellingen LGA

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
Raleigh Industrial Precinct	58.4	40.9	70%
Dorrigo Industrial Area*	11.1	7.0	63%
North Urunga Industrial Precinct	2.3	1.2	52%
Bellingen Tamarind Drive Precinct	1.4	0.8	57%
<b>Total</b>	<b>73.2</b>	<b>49.9</b>	<b>68%</b>

\* Includes Wattle Street Industrial Precinct

Source: MacroPlan Dimasi

Key findings pertinent to our examination include:

- The largest precinct is the **Raleigh Industrial Precinct**, which spans across 58.4 hectares. Positioned adjacent to Pacific Highway, this estate is tenanted by Aussie Loo Portable toilets and Builders Sheds, Outer Islands Surfboards and Full Moon Natural Health Products.
- As advised by Bellingen Shire Council, the undeveloped portion of Raleigh Industrial Precinct is heavily constrained, mainly due to flooding, flora and fauna restrictions or because it has been used for landfill purposes.
- Two other existing precincts were identified – the **Dorrigo Industrial Area** (which includes the Wattle Street Industrial Precinct) and the **North Urunga Industrial Precinct**, which are approximately 11.1 and 2.3 hectares in size, respectively. Additionally, the **Bellingen Tamarind Drive Precinct** is relatively small, comprising of just 1.4 hectares of land.

- Of the total, it is estimated around 68% of industrial land is developed, equating to 49.9 hectares.
- At an average floor space ratio of 0.6:1, this equates to approximately 14 hectares of industrial floorspace available for future development.

### 11.5.3 Industrial – Future supply

- Approximately 30.4 hectares of future industrial land has been identified.
- A summary of land areas and potential delivery times is presented in the next table.

<b>Precinct</b>	<b>Land Area</b> (Hectares)	<b>Timing</b> (Years)
Urunga Industrial Precinct	13.4	1 - 10
*Raleigh Industrial Precinct	8.9	1 - 10
*Hennesseys Lane Industrial Precinct	5.7	1 - 10
Dorrigo Industrial Precinct	2.4	10 - 20
<b>Total</b>	<b>30.4</b>	

*Source: MacroPlan Dimasi*  
*\*Subject to further investigation and inclusion within the Mid North Coast Regional Strategy*

- The Employment Lands Strategy (ELS 2014) has identified the potential for expansion on land located opposite the **Urunga Industrial Precinct** (on the eastern side of the Pacific Highway) amounting to 13.4 hectares.
- The **Raleigh Industrial Precinct** is currently well utilised. The proposed extension allows for an additional nine hectares of land to the south of the existing precinct. According to the ELS 2014, there is limited potential for the expansion of precinct without clearing, which could have significant environment implications.

### 11.5.4 Retail & Commercial – Existing supply

Bellingen, is a small LGA in comparison with some of the larger coastal LGAs in the Mid North Coast Region, and provides a much smaller amount of retail floorspace and business zoned land than other LGAs. As previously identified in

this report, the current population of Bellingen is around 13,000 persons and the LGA attracts relatively limited tourism visitation per year. This population level is insufficient to support sub-regional and regionally oriented retail/commercial centres and therefore the existing provision is generally local/convenience related in nature.

The Bellingen Shire LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 11.3 and Map 11.4.

- The Bellingen LGA centres hierarchy generally consists of the following structure:
  - Bellingen Town Centre
  - Other centres/villages (such as Dorrigo and Urunga)
- There are no discount department stores (dds), or department stores, nor any major enclosed shopping centres in the Bellingen LGA. There is a larger provision of retail facilities provided in Toormina and the closest higher order shopping facilities and designated regional centre is located in Coffs Harbour.

#### **Bellingen Town Centre**

- The Bellingen Town Centre is the dominant retail destination within the LGA, occupying around 10.6 ha of business zoned land, including the 10.3 ha of B2 zoned land and 0.2 ha of B1 zoned land. The town centre is oriented along Waterfall Way, which is the main thoroughfare through the Bellingen LGA.
- The Bellingen town centre is estimated to provide approximately 21,000 - 22,000 sq.m of total floorspace, comprised of approximately 8,000 - 10,000 sq.m of retail floorspace and some 6,000 – 8,000 sq.m of commercial floorspace.
- The town centre includes an IGA supermarket anchored convenience centre, and provides a range of cafes, restaurants, pubs, convenience retailing including retail services and non-food retail i.e. pharmacies, hardware stores, and a small provision of boutique fashion retailers.



- In regards to non-retail uses, there are service stations, pubs, medical/health facilities, accountants, lawyers, banks, real estate agencies.

### **Other centres/villages**

There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:

- Dorrigo: Is a small village located in the north-west of the Bellingen LGA that provides around 5,500 - 6,500 sq.m of retail floorspace, which includes an IGA supermarket, as well as a small Spar supermarket. The village centre also contains a number of cafés, and pubs, as well as variety of convenience retail including a pharmacy, butcher, hardware store and fresh fruit and vegetable store. Dorrigo village centre is estimated to provide approximately 2,500 – 3,500 sq.m of commercial floorspace.
- Urunga: Is a small village located to the east of Bellingen town centre, close to the coast of the Bellingen LGA. Urunga includes several retail/commercial tenants including a small Foodworks and Spar supermarket. In total, Urunga is estimated to provide between 2,500 – 3,000 sq.m of retail floorspace and some 1,000 – 1,500 sq.m of commercial floorspace.

# Map 11.5


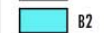

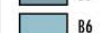

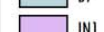


## Bellingen Shire Council

### Retail Provision

#### Legend \*

-  Bellingen Shire Council Boundary

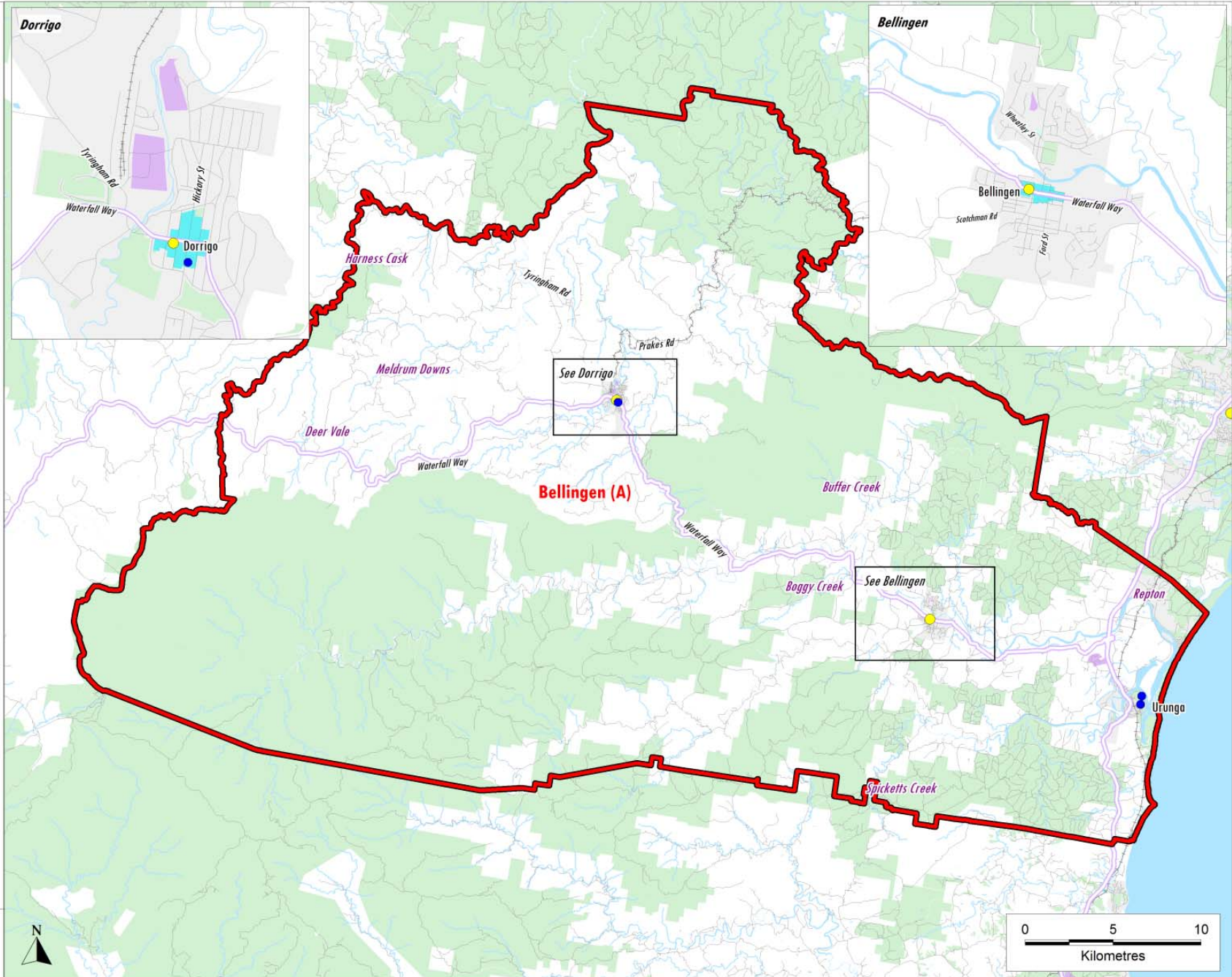
#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

#### Retail Competition

-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)
-  Potential Smkt

\*Hollow symbols indicate proposed stores





# Map 11.6 Bellingen Shire Council

## Bulky/ Homemaker Goods Retailing Legend \*

Bellingen Shire Council Boundary

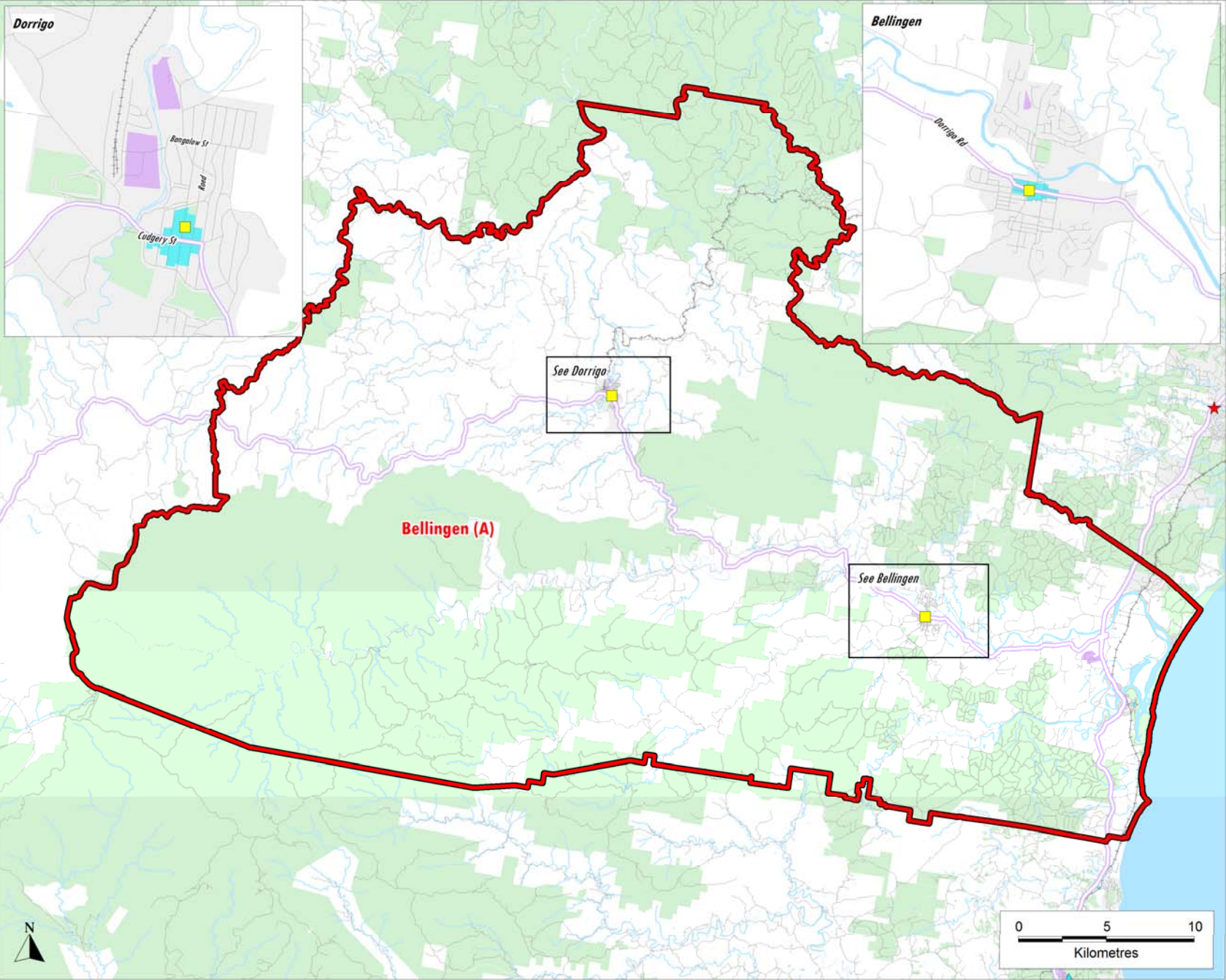
### Bulky Goods Retailers

Thrifty Link

### Land Zones

- |    |     |
|----|-----|
| B1 | B7  |
| B2 | IN1 |
| B3 | IN2 |
| B4 | IN3 |
| B5 | IN4 |
| B6 |     |

\* Hollow symbols indicate proposed stores



**Business zoned land capacity for retail and commercial floorspace**

Table 11.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **22.4 hectares of business zoned land** within the Bellingen LGA, of which 22.2 ha is B2 zoned land and 0.2 ha of B1 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- We have applied FSRs for each business zone type based on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Bellingen LGA to be in the order of 257,032 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 40%, given the relative lack of higher order retail, and full-line supermarket facilities, compared with the suburbs of Toormina and Coffs Harbour. In order to gain an indicative understanding of the suitability, and capacity, of the current provision of business zoned land to meet future demand we have compared the estimated 'net retail demand' now, and in 2031. Accounting for the estimated land requirement of 1.1 hectares over the forecast period, the spare capacity of business zoned land within the Bellingen Shire LGA decreases from 6.4 hectares to 5.2 hectares.

**Table 11.11**  
**Bellingen LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1*	0.2	0.9	2,046
Total B2*	<u>22.2</u>	<u>1.2</u>	254,986
<b>Total LGA</b>	<b>22.4</b>		<b>257,032</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

### 11.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within the Bellingen LGA.

### 11.5.6 Special Uses – Existing supply

- According to the Bellingen LEP 2010, there are two categories within 'Special Use' zoning; SP1 Special Activities and SP2 Infrastructure.
- Cemeteries, sewerage treatment works and classified roads have been excluded from our estimates of urban employment land for this category, totalling 10.5 hectares.
- As a consequence, there is one facility, classified as an 'educational establishment' (SP2) within Special Use zoning. The Bellingen High School site encompasses a total of 10.5 hectares. As advised by Council, 5 hectares is flood prone, and the remainder has already been developed. As such, there is approximately 2.5 hectares of developable land on this site.

**Figure 5. Satellite image of the Bellingen High School**



*Source: SIX maps (NSW Department of Planning and Environment)*

### 11.5.7 Special Uses – Future supply

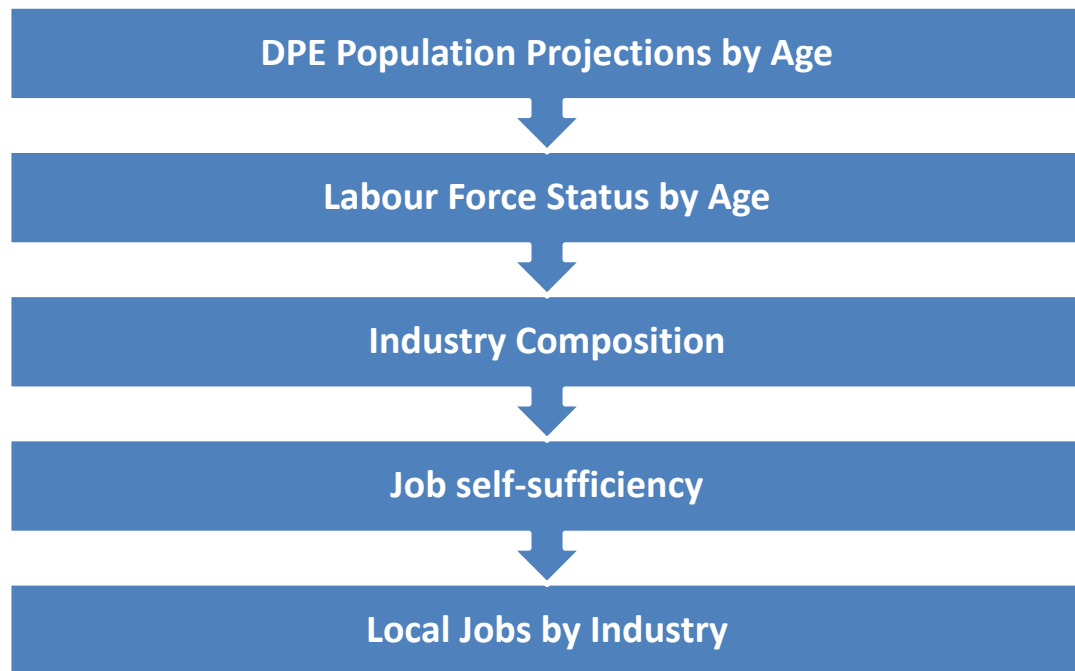
There are currently no infrastructure upgrades or developments proposed for the Bellingen LGA within the Special Use category of zoning.

## 11.6 Demand for employment land

### 11.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in the Bellingen LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Bellingen LGA to generate employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Bellingen LGA.





- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  - Converting jobs by industry into specific built form types
  - Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative methodology.

#### 11.6.2 Employment projections

- Following 14 job additions between 2006 and 2011, employment in the Bellingen LGA is projected to increase over the forecast period. Over the 2011 to 2031 period, it is expected the workforce will expand by a total of 81 jobs.
- Over the decade to 2021, our projections imply a small job increase for the Bellingen LGA (11 jobs). As at 2021, the LGA is projected to support 3,282 jobs.

- By 2031, employment in the LGA is expected to increase to 3,352, representing 70 extra jobs on the 2021 figure.
- Between 2011 and 2031, employment growth is expected to be most pronounced within Health Care and Social Assistance (+45), Accommodation and Food Services (+37), Education and Training (+30) and Retail Trade (+22).
- Outright job losses is predicted across six industries, with the greatest reductions occurring in Manufacturing (-51) and Agriculture, Forestry and Fishing (-27).

**Table 11.12**  
Employment by Industry - Bellingen LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	408	434	453	45
Accommodation and Food Services	335	353	372	37
Education and Training	322	338	352	30
Retail Trade	377	378	399	22
Professional, Scientific and Technical Services	171	176	190	19
Transport, Postal and Warehousing	91	100	106	15
Rental, Hiring and Real Estate Services	53	53	67	14
Construction	212	210	225	13
Electricity, Gas, Water and Waste Services	25	29	36	11
Wholesale Trade	90	92	98	8
Financial and Insurance Services	38	43	43	5
Other Services	121	115	124	3
Mining	5	5	7	2
Administrative and Support Services	71	72	70	-1
Arts and Recreation Services	69	70	65	-4
Information Media and Telecommunications	15	11	11	-4
Public Administration and Safety	186	182	169	-17
Agriculture, Forestry and Fishing	353	335	326	-27
Other*	43	31	3	-40
Manufacturing	286	256	235	-51
<b>Total</b>	<b>3,271</b>	<b>3,282</b>	<b>3,352</b>	<b>81</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.



Table 11.13  
Industry and Land Use Conversion Matrix - Bellingen LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	40%	0%	60%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

Table 11.14  
Employment Additions by Land Use Type - Bellingen LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	0	1	3	7	0	0
Construction	0	1	0	13	0	0
Wholesale Trade	2	5	0	1	0	0
Retail Trade	1	20	0	1	0	0
Accommodation and Food Services	13	13	6	6	0	0
Transport, Postal and Warehousing	2	1	8	4	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	5	1	0	0	0	0
Rental, Hiring and Real Estate Services	0	15	0	0	0	0
Professional, Scientific and Technical Services	5	14	0	0	0	0
Administrative and Support Services	1	0	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	2	1	0	0	15	13
Health Care and Social Assistance	10	8	0	0	15	11
Arts and Recreation Services	1	0	0	0	0	0
Other Services	0	9	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 11.6.3 Employment floorspace demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities present the average floorspace needed to accommodate new workers. That is, for every new job in manufacturing, an additional 250sqm of industrial floorspace is required (presented in Table 11.15).

**Table 11.15**  
Indicative Employment Density by Industry and Land Use Type - Bellingen LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

*Source: MacroPlan Dimasi*

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in a floorspace additional (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 11.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Bellingen LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	30	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	20	30	860	1,650	0	0
Construction	0	40	0	2,000	0	0
Wholesale Trade	50	150	80	260	0	0
Retail Trade	40	800	10	150	0	0
Accommodation and Food Services	640	660	830	850	0	0
Transport, Postal and Warehousing	60	30	1,500	830	0	0
Information Media and Telecommunications	0	10	0	0	0	0
Financial and Insurance Services	110	20	0	0	0	0
Rental, Hiring and Real Estate Services	0	360	0	0	0	0
Professional, Scientific and Technical Services	140	350	0	0	0	0
Administrative and Support Services	10	0	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	60	60	0	0	730	640
Health Care and Social Assistance	410	310	0	0	920	690
Arts and Recreation Services	50	0	0	0	0	0
Other Services	0	370	0	0	0	0
<b>Total</b>	<b>1,590</b>	<b>3,190</b>	<b>3,280</b>	<b>5,770</b>	<b>1,650</b>	<b>1,330</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **1,590 sq.m of commercial, 3,280 sq.m of industrial and 1,650 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **3,190 sq.m of commercial, 5,570 sq.m of industrial and 1,310 sq.m of special uses** floorspace is expected to materialise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 11.17.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 11.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Bellingen LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	30	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	10	20	650	1,240	0	0
Construction	0	30	0	1,500	0	0
Wholesale Trade	40	120	60	190	0	0
Retail Trade	30	600	10	110	0	0
Accommodation and Food Services	480	490	620	630	0	0
Transport, Postal and Warehousing	40	20	1,130	630	0	0
Information Media and Telecommunications	0	10	0	0	0	0
Financial and Insurance Services	80	20	0	0	0	0
Rental, Hiring and Real Estate Services	0	270	0	0	0	0
Professional, Scientific and Technical Services	100	260	0	0	0	0
Administrative and Support Services	10	0	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	50	40	0	0	540	480
Health Care and Social Assistance	310	230	0	0	690	520
Arts and Recreation Services	40	0	0	0	0	0
Other Services	0	280	0	0	0	0
<b>Total</b>	<b>1,190</b>	<b>2,390</b>	<b>2,470</b>	<b>4,330</b>	<b>1,230</b>	<b>1,000</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicates **1,190 sq.m of commercial, 2,470 sq.m of industrial** and **1,230 sq.m of special use** floorspace will be required by 2021.
- Under the Alternative scenario, demand is anticipated to rise relative to the prior ten year period. Over the ten years to 2031, an additional **2,390 sq.m of commercial, 4,330 sq.m of industrial** and **1,000 sq.m of special uses** floorspace is expected to materialise.

#### 11.6.4 Demand for employment land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- According to the July 2014 Department of Planning and Environment GIS layers, FSR references are limited in the Bellingen LGA. As such, our assessment has relied on average FSRs observed for the broader North Coast region (as presented in Table 8.18).
- Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **0.4–0.5 hectares of commercial, 1.1–1.5 hectares of industrial and 0.3-0.4 hectares of special uses** land will be required by 2031.

Table 11.18

Demand for Employment Land (2031) - Bellingen LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	0.4 - 0.5	1.0	0.4 - 0.5
Industrial	0.7 - 0.9	0.6	1.1 - 1.5
Special Uses	0.2 - 0.3	0.8	0.3 - 0.4

Source: MacroPlan Dimasi

#### 11.6.5 Demand for retail floorspace and land

The potential drivers of future demand for retail floorspace in the Bellingen Shire LGA are summarised below:

- Population growth – which is expected to be relatively flat (i.e. zero/negative growth).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.7% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to

year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

### Quantification of demand

Table 11.19 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Bellingen LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 11.19 shows the following:

- As at 2014, the residential population of the Bellingen LGA generates more than **26,500 sq.m** of retail floorspace demand, which is equivalent to a provision rate of approximately **2.1 sq.m per capita**.
- By 2031, the total residential retail floorspace demand is estimated to grow by nearly **3,500 sq.m**, which is an increase of about **13%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to more than **1,700 sq.m**, and is expected to increase by approximately **450 sq.m** by 2031.
- Assuming an average floorspace ratio (FSR) of 0.5, the total growth in demand for retail floorspace, of nearly **4,000 sq.m**, equates to an equivalent land requirement of **0.8 hectares**.

Table 11.19

Bellingen LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	12,960	13,000	13,000	12,950	12,800	-0.1%
Tourism equiv. pop	937	940	940	936	925	-0.1%
<b>Retail exp. (\$M)</b>						
Food & liquor	73	74	77	81	84	0.8%
Food catering	18	18	19	21	22	1.1%
Apparel	13	13	14	14	14	0.3%
Household	28	28	29	30	30	0.3%
Leisure	8	8	8	9	9	0.6%
General	13	13	14	15	15	1.0%
Retail services	<u>4</u>	<u>4</u>	<u>4</u>	<u>5</u>	<u>5</u>	<u>0.6%</u>
<b>Total</b>	<b>157</b>	<b>160</b>	<b>166</b>	<b>173</b>	<b>178</b>	<b>0.7%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	8,084	8,231	8,594	8,979	9,312	0.8%
Food catering	2,993	3,062	3,237	3,424	3,595	1.1%
Apparel	2,425	2,444	2,489	2,537	2,567	0.3%
Household	9,399	9,475	9,649	9,834	9,949	0.3%
Leisure	1,324	1,341	1,383	1,427	1,462	0.6%
General	2,145	2,190	2,304	2,425	2,533	1.0%
Retail services	<u>717</u>	<u>726</u>	<u>749</u>	<u>773</u>	<u>792</u>	<u>0.6%</u>
<b>Total</b>	<b>26,542</b>	<b>26,966</b>	<b>28,003</b>	<b>29,106</b>	<b>30,034</b>	<b>1.0%</b>
Floorspace per capita	2.05	2.07	2.15	2.25	2.35	0.8%
<b>Tourism demand</b>						
Equiv. tourism pop.	937	940	940	936	925	-0.1%
Floorspace per capita	<u>1.84</u>	<u>2.07</u>	<u>2.15</u>	<u>2.25</u>	<u>2.35</u>	1.4%
<b>Tourism floorspace (sq.m)</b>	<b>1,727</b>	<b>1,950</b>	<b>2,025</b>	<b>2,104</b>	<b>2,171</b>	<b>1.4%</b>
<b>Total retail demand (sq.m)</b>	<b>28,269</b>	<b>28,916</b>	<b>30,028</b>	<b>31,210</b>	<b>32,205</b>	<b>0.8%</b>
<b>Demand growth (14-31)</b>					<b>3,936</b>	
<b>Estimated land take (ha)</b>					<b>0.8</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 11.7 Gap Assessment

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Bellingen LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Bellingen LGA.

Key findings pertaining to our gap assessment are presented in Table 11.20

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	22.4	3.4	0.0	3.4	1.2	2.1
Industrial	73.2	23.0	30.4	53.4	1.3	52.1
Special Uses	10.6	2.5	0.0	2.5	0.3	2.2

Source: MacroPlan Dimasi

- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 2.1 hectares*
  - *Supply of industrial land will exceed demand by 52.1 hectares*
  - *Supply of special uses land will exceed demand by 2.2 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Bellingen LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Bellingen LGA, particularly for emerging businesses and industries.



- It is recognised that the Bellingen LGA will need to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 3.4 hectares and 1.5 hectares respectively available for development beyond 2031).
- To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Bellingen LGA.
- It is believed some future demand for health service purposes could be accommodated by employment and residential zones.

## 11.8 Conclusions

### 11.8.1 Commercial, Industrial and Special Uses

Between 2006 and 2011, population growth in the Bellingen LGA was weak, expanding by just 207 persons. During this period, population growth in 50+ persons offset a contraction in young working adults. Over the five years to 2011, net migration to Bellingen LGA totalled 141 persons, supported by a net inflow from Sydney (+334 persons).

The retention of young workers is a key issue for the Bellingen LGA. Young working adults have left the region in search of better job security and options. Other major regional centres and capital cities represent popular destinations for these young workers.

Four of the top five employing industries are service orientated, supporting the needs of local residents e.g. Health Care and Social Assistance (12.5%), Retail Trade (11.5%), Accommodation and Food Services (10.2%) and Education and Training (9.8%). The exception to this rule is manufacturing, which is the fifth largest employing industrial in the LGA. As at 2011, it engaged 8.7% of Bellingen LGA's workforce. Collectively, these industries engage around 51% of the local workforce. At 3,271 jobs, Bellingen LGA accounted for less than 2% of the North Coast workforce.

Notably, just 56.7% of Bellingen's working residents also work in the LGA. According to Census 2011, 43.3% of the LGA's work residents travel either to other North Coast LGAs (28.8%) or locations outside the North Coast (14.5%) for work. Industries with low job-containment include Health Care and Social Assistance, Education and Training and Construction – two of which are the region's largest employers.

Between 2006 and 2011, employment growth in the Bellingen LGA was negligible, increasing by 14 jobs. Job additions was most pronounced in Construction (+53 jobs), followed by Public Administration and Safety (+36 jobs), Professional, Scientific and Technical Services (+26 jobs) and Health Care and Social Assistance (+23 jobs). Jobs losses were observed throughout nine industries in Bellingen LGA.

Key economic and demographic drivers and associated outcomes for the Bellingen LGA include:

- DPE projections indicate the resident population in the Bellingen LGA will contract over the forecast period, placing pressure on the region's future growth potential (and employment).
- Ageing within the local population to prompt investment in health capacity.
- Low rates of job containment to persist across key industries such as Health Care and Social Assistance and Education and Training.
- Two core service industries (e.g. Health Care and Social Assistance and Accommodation and Food Services) and Transport, Postal and Warehousing to facilitate jobs growth in the future.
- Job losses expected in Manufacturing and Agriculture, Forestry and Fishing.

As such, our estimates of demand indicate **3,580–4,780 sq.m of commercial, 3,936 sq.m of retail, 6,800–9,050 sq.m of industrial and 2,230–2,980 sq.m of special use** floorspace will be required by 2031.

Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **0.4–0.5 hectares of commercial, 1.1–1.5**

**hectares of industrial and 0.3-0.4 hectares of special uses** land will be required by 2031.

Assuming that there are minimal development constraints, our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Bellingen LGA (out to 2031).

Over the forecast period, it is estimated:

- *Supply of business land will exceed demand by 2.1 hectares*
- *Supply of industrial land will exceed demand by 52.1 hectares*
- *Supply of special uses land will exceed demand by 2.2 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Bellingen LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Bellingen LGA, particularly for emerging businesses and industries.

It is recognised that the Bellingen LGA will need to plan for more business and special use zoned land to accommodate demand post 2031 (as it is estimated there will only be 3.4 hectares and 1.5 hectares respectively available for development beyond 2031).

To increase the stock of business land, rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'business' land in Bellingen LGA.

It is believed some future demand for health service purposes could be accommodated by employment and residential zones.

### 11.8.2 Retail

We make the following preliminary comments in relation to retail market conditions within the Bellingen LGA:

- Bellingen LGA has a small population with relatively low tourist visitor numbers. Future growth in the residential population and tourism visitation is expected to be modest, with retail floorspace demand estimated to grow by nearly 4,000 sq.m by 2031, equating to an estimated land requirement of 0.8 hectares.
- Existing retail demand is estimated at nearly 28,300 sq.m and we estimate the retail capacity of the existing business zoned land in the LGA to be about 257,032 sq.m. However, because the retail offer in the Bellingen LGA is relatively small, we estimate leakage of about 40% beyond the LGA to centres such as Toormina and Coffs Harbour. This means net demand is currently about 17,000 sq.m, and is expected to increase to some 19,300 sq.m by 2031.
- The population of the LGA is too small to trigger thresholds for additional major tenants and enclosed shopping centre floorspace.
- There is significant escape expenditure to surrounding higher order retail facilities provided in Toormina and Coffs Harbour. This would include expenditure on fashion, leisure, dds and household goods/bulky goods retailing.
- While the LGA does not support a full range of retail formats and centre types, the community appears to be sufficiently serviced for convenience retail related items, although given the greater range and depth on offer in Toormina and Coffs Harbour there will likely be leakage to other regions for supermarket shopping.
- Our preliminary analysis indicates that the existing land stock will **be sufficient to support the future retail demand growth across the LGA.**
- We recommend that future retail development activity, if there is any, be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

- It is recognised that the Bellingen LGA may need to plan for additional zoned land to meet commercial and retail demand post 2031. As such, we recommend that consideration be taken to rezone land around the periphery of existing commercial centres to plan for future needs.

## Section 12: LGA Analysis – Nambucca

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Nambucca LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land ‘capacity’ within Nambucca LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land ‘status’ for Nambucca LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from DP&E and Nambucca Shire Council.

### 12.1 Key facts, findings and take-outs

#### 12.1.1 Population growth

- Between 2006 and 2011, the resident population of Nambucca LGA expanded by 936 persons.
- Persons aged 65+ in Nambucca increased substantially (589 persons), while net declines were registered in the 20-34 and 35-49 age cohorts.

- Over the five years to 2011, net migration to Nambucca LGA totalled 788 persons. Notably, a net increase was achieved for all age groups except for the 20-34 age cohort – consistent with the broader national trend of young adults leaving regional areas.
- DPE projections indicate population growth will ease from current levels (0.4% per annum out to 2031).

### 12.1.2 Employment trends

- As at 2011, the Nambucca LGA supported 4,764 jobs, accounting for 2.6% of the North Coast workforce.
- The industry composition is skewed to service orientated industries e.g. Health Care and Social Assistance, Retail Trade, Education and Training and Accommodation and Food Services.
- Over the five year period to 2011, 204 new jobs were created in Nambucca LGA.
- Over the five year period, employment growth was greatest within Education and Training (+84 jobs), followed by Health Care and Social Assistance (+47 jobs) and Construction (+44 jobs).

### 12.1.3 Employment land

- Following 204 job additions during the 2006-2011 period, the Nambucca LGA workforce is expected to expand by an extra 489 jobs over the forecast period (i.e. 2011 to 2031).
- In Nambucca LGA, there are 240 hectares of land zoned for urban employment purposes – comprising of 31% Business, 64% Industrial and 4% Special Uses.
- Underscored by investment in health and aged service provision, the Nambucca LGA workforce is expected to expand by an additional 489 jobs over the forecast period (i.e. 2011 to 2031).
- Our projections indicate **9,510–12,670 sq.m of commercial**, **8,500 sq.m of retail**, **15,890–21,200 sq.m of industrial** and **6,090–8,130 sq.m of special use** floorspace will be required by 2031.

- Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial, 1.7 hectares of retail, 2.6–3.5 hectares of industrial** and **0.8–1.0 hectares of special uses** land will be required by 2031.
- Generally, our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Nambucca LGA out to 2031. It is estimated:
  - *Supply of business land will exceed demand by 22.2 hectares*
  - *Supply of industrial land will exceed demand by 226.8 hectares*
  - *Supply of special uses land will exceed demand by 2.8 hectares*
- It is recognised that the Nambucca LGA will need to plan for more special uses zoned land to accommodate demand for Health Care and Social Assistance post 2031 - as it is estimated there will only be 2.8 hectares 'remaining' as at 2031.
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Nambucca LGA. Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Nambucca LGA relative to that suggested in this land assessment, particularly to cater for emerging businesses and industries.
- Due to land constraints, it is believed some future demand for health service purposes could be accommodated within business zoned land.
- As such, rezoning of sites at the periphery of existing commercial cores, towns centres (i.e. local and neighbourhood) and around non-constrained special use allocations may represent a practical approach to delivering more 'special use' land in Nambucca LGA.



## 12.2 Literature review

The key documents of relevance to employment lands within Nambucca LGA are the Nambucca Shire Local Growth Management Strategy (Employment Land) (NSLGMS), the Economic Development Plan 2010 (EDP) and the Nambucca Shire Structure Plan 2008 including the Structured Growth Management Plan for Nambucca Valley: Economic and Employment Lands Strategy 2005 (NSSP). The NSLGMS analyses the existing economic conditions and opportunities for the Shire, this plan was informed by NSSP and the Hill PDA Economic and Employment Lands Strategy (2005).

The following points have been noted:

- The MNCRS defined a centres hierarchy for the Nambucca Shire that designates Macksville as a Major Town, and Nambucca Heads as a Town.
- The NSLGMS indicates that retail development is generally confined to the towns of Macksville and Nambucca Heads. The strategy found that there was a limited supply of commercial land and that significant future demand would drive a need for additional zoned land to support retail and commercial uses.
- The NSLGMS recommended that a further 800 to 4,800 sq.m of commercial office space be accommodated in existing/proposed commercial zones and that a further 17,000 to 37,000 sq.m of retail space be incorporated within existing commercial land and new commercial land at Macksville, Bellwood and Nambucca, between 2011 and 2031. The lower end of these ranges adopted the NSW DPE projections (i.e. about 0.4% p.a.).
- At the time of the report, the Woolworths store at Macksville was under construction (now built) and a DA approval existed for a 10,500 sq.m supermarket/dds anchored shopping centre at Bellwood (which has not been built).
- The NSLGMS indicated that the provision of traditional retail appeared to be relatively consistent with community needs in the short-medium term, however there was a gap for bulky goods retailing. The strategy encouraged future

zoning of land, outside the traditional centres, to accommodate such development and to minimise leakage.

- The NSLGMS found that there is inadequate industrial land to cater for future growth within the existing industrial land supply.
- Furthermore the NSLGMS states Council needs to provide for bulky goods type industries on the edge of existing urban areas.
- To diversify the economic base, the EDP states there needs to be focused development in manufacturing, create a distribution and logistics hub and investment in tourism and agribusiness.
- As Nambucca is situated between Coffs Harbour and Port Macquarie the EDP identifies it should function as a major manufacturing and distribution hub.
- The Structure Plan 2008 outlines that limited retail and commercial development should be allowed outside identified precincts to support existing major centres. It particularly looks at strengthening Macksville as the main market town.
- The Structure Plan and associated study states that 11ha of industrial land will be required to 2026, which could be sourced from vacant land in Macksville and expansion of existing industrial land in Nambucca Heads.

## **12.3 Socio-demographic trends**

### **12.3.1 Population change**

- According to ABS ERP figures, the resident population of Nambucca LGA increased by 936 persons from 2006–2011, taking its total population to 19,235 persons.

**Table 12.1**  
**Estimated Resident Population (persons) - Nambucca LGA**

Year	Estimated Resident Population	Total Change (persons)
2001	18,026	
2006	18,299	273
2011	19,235	936

Source: ABS

- Consistent with national trends, the number of persons aged 65+ in Nambucca increased substantially – increase of 589 persons.
- Net losses in the 20-34 and 35-49 age cohorts were recorded during the 2006-2011 period (-12 and -348 persons respectively).

**Table 12.2**  
**Population By Age (persons) - Nambucca LGA**

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	4,544	4,585	41	24%
20-34	2,124	2,112	-12	11%
35-49	3,552	3,204	-348	17%
50-64	4,028	4,694	666	24%
65+	4,051	4,640	589	24%
<b>Total</b>	<b>18,299</b>	<b>19,235</b>	<b>936</b>	<b>100%</b>

### 12.3.2 Migration movements

Inward and outward movements for the Nambucca LGA have been analysed, using 2006 and 2011 Census data (Place of Usual Residence).

- Over the five year period to 2011, ABS Census data indicates a net inflow of 788 persons into the Nambucca LGA. Notably, a net increase was achieved for

all age groups except the 20-34 age cohort which is consistent with the broader national trend of young adults leaving regional areas.

- The two main components of Nambucca's population net inflow are persons from Sydney and regional NSW – 589 and 95 persons respectively.
- By age group, persons aged between 20-34 years represented the largest net outflow with a loss of 304 persons.
- The most significant contributing age cohort to the net migration gain was the 50-64 year aged cohort, recording a gain of 451 persons.

Region	0-19	20-34	35-49	50-64	65+	Total
Mid North Coast	13	-7	22	-13	-5	10
Sydney	56	2	133	254	144	589
Regional NSW	17	-92	82	109	-21	95
Interstate	-12	-241	84	79	52	-38
Overseas	16	34	42	22	18	132
<b>Total Net Migration</b>	<b>90</b>	<b>-304</b>	<b>363</b>	<b>451</b>	<b>188</b>	<b>788</b>

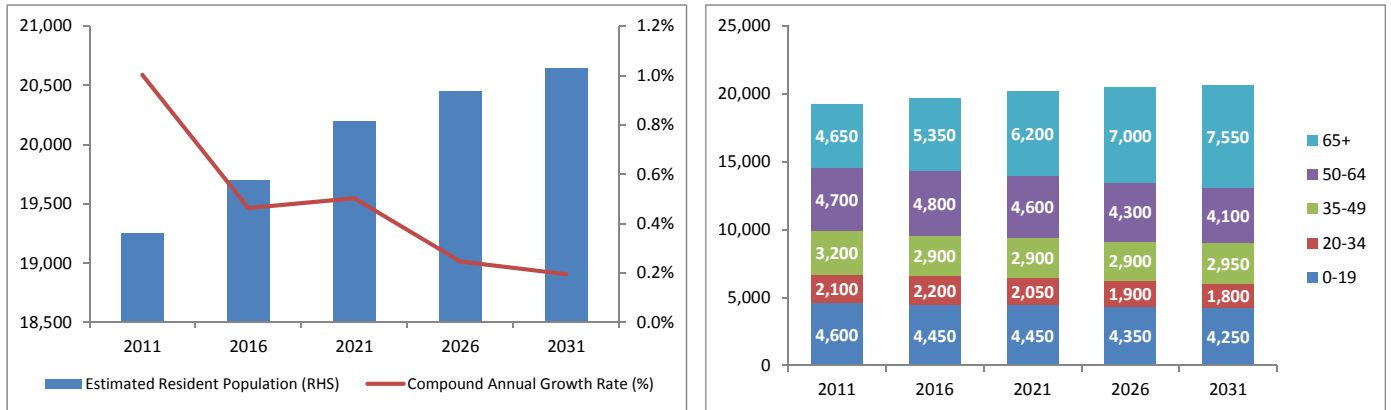
Source: ABS

### 12.3.3 Population projections

- According to DP&E (2014) projections, the Nambucca LGA population is projected to expand to 20,650 persons by 2031.
- The rate of growth equates to an average annual increase of 70 persons over the twenty year period to 2031 period.
- The DPE has nominated internal migration, a high fertility rate and an ageing population represent the key drivers of future population change.
- However, with the exception of retirees (65+), all age cohorts are projected to incur contractions i.e. 0-19 (-350 persons), 20-34 (-300 persons), 30-49 (-250) and 50-64 (-600 persons).

- As such, Nambucca’s population growth is expected to be driven by its ageing population, with an additional 2,900 65+ aged persons expected over the forecast period.

**Figure 1. Projected Population and population by age (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- As at 2011, retirees represented 24% of the total population; however by 2021 this is expected to increase to 31%. By 2031, almost 1 in 3 persons in the LGA is expected to be aged 65+.
- Growth in older households is expected to underpin demand for medical and health services, evidenced by a solid pipeline of proposed and planned health facility and aged care accommodations projects.
- However, with labour resources expected to diminish (in line with elevated rates of retirement), the ability to attract young workers to Nambucca LGA is expected to be instrumental to the delivery of health related services.

#### 12.3.4 Labour force status

- Of all residents in the Nambucca LGA, around 82% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 46% i.e. 6,743 of 14,566 residents.

- Of residents in labour force, 89% were employed and 11% unemployed (and seeking working).
- Compared to the North Coast region (92%), the Nambucca LGA's employment rate is significantly lower.

Table 12.4

## Labour Force Status by Age (number) - Nambucca LGA

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	378	95	473	591	1,064
20 - 29	694	168	862	376	1,238
30 - 39	939	122	1,061	417	1,478
40 - 49	1,429	142	1,571	521	2,092
50 - 59	1,757	148	1,905	1,044	2,949
60 - 69	692	45	737	2,038	2,775
70 - 79	115	0	115	1,697	1,812
80 - 84	16	3	19	582	601
85+	0	0	0	557	557
<b>Total</b>	<b>6,020</b>	<b>723</b>	<b>6,743</b>	<b>7,823</b>	<b>14,566</b>

Source: Census of Population and Housing (2011)

### 12.3.5 Job containment

- Self-containment is defined as the percentage of working residents who are employed within the boundaries of the Nambucca LGA.
- Approximately 72.2% of employed residents worked in the Nambucca LGA.
- The remaining 27.8% of working residents travel either to other North Coast LGAs (14.3%) or locations outside the North Coast (13.4%) for work.
- Of working residents who travel to other North Coast LGAs, popular workplace destinations include Coffs Harbour (7.4%), Kempsey (4.1%) and Bellingen (2.3%) LGAs.

**Table 12.5**  
**Job Containment - Nambucca LGA**

	<b>Value</b>
Working residents	5,947
<u>Place of Work (number)</u>	
Nambucca	4,296
North Coast LGAs (ex. Nambucca)	852
Outside North Coast	799
<b>Total</b>	<b>5,947</b>
<u>Job Containment (%)</u>	
Nambucca	72.2%
North Coast LGAs	14.3%
Other	13.4%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- The next table presents job containment by industry for the Nambucca LGA.
- In all, eleven industries achieved a higher rate of job containment than the all industries average for Nambucca LGA (72.2%).
- With the exception of Agriculture, Forestry and Fishing, the top six 'containing' industries are all service-orientated i.e. Rental, Hiring and Real Estate Services, Accommodation and Food Services, Retail Trade, Other Services and Education and Training.
- Notably, two service industries were amongst the lowest 'containing' industries in the Nambucca LGA i.e. Financial and Insurance Services (56.1%) and Administrative and Support Services (59.0%).
- Rental, Hiring and Real Estate Services and Accommodation and Food Services achieved job containment rates in excess of 85% as at 2011 – 85.4% and 85.0% respectively.

Table 12.6  
Job Containment by Industry - Nambucca LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	85.4%	8.5%	6.1%	100.0%
Accommodation and Food Services	85.0%	7.4%	7.6%	100.0%
Agriculture, Forestry and Fishing	84.1%	7.0%	8.9%	100.0%
Retail Trade	80.6%	11.0%	8.3%	100.0%
Other Services	80.2%	10.6%	9.3%	100.0%
Education and Training	77.5%	17.3%	5.3%	100.0%
Arts and Recreation Services	76.8%	15.9%	7.3%	100.0%
Manufacturing	76.8%	13.6%	9.6%	100.0%
Electricity, Gas, Water and Waste Services	76.1%	15.2%	8.7%	100.0%
Professional, Scientific and Technical Services	75.7%	13.8%	10.6%	100.0%
Mining	72.7%	0.0%	27.3%	100.0%
<b>Across all industries</b>	<b>72.2%</b>	<b>14.3%</b>	<b>13.4%</b>	<b>100.0%</b>
Health Care and Social Assistance	71.3%	19.6%	9.1%	100.0%
Wholesale Trade	70.9%	21.6%	7.5%	100.0%
Information Media and Telecommunications	68.3%	26.7%	5.0%	100.0%
Public Administration and Safety	64.1%	24.9%	10.9%	100.0%
Transport, Postal and Warehousing	59.5%	17.5%	23.0%	100.0%
Administrative and Support Services	59.0%	9.2%	31.8%	100.0%
Financial and Insurance Services	56.1%	35.7%	8.2%	100.0%
Construction	44.7%	10.9%	44.4%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 12.4 Employment and labour market trends

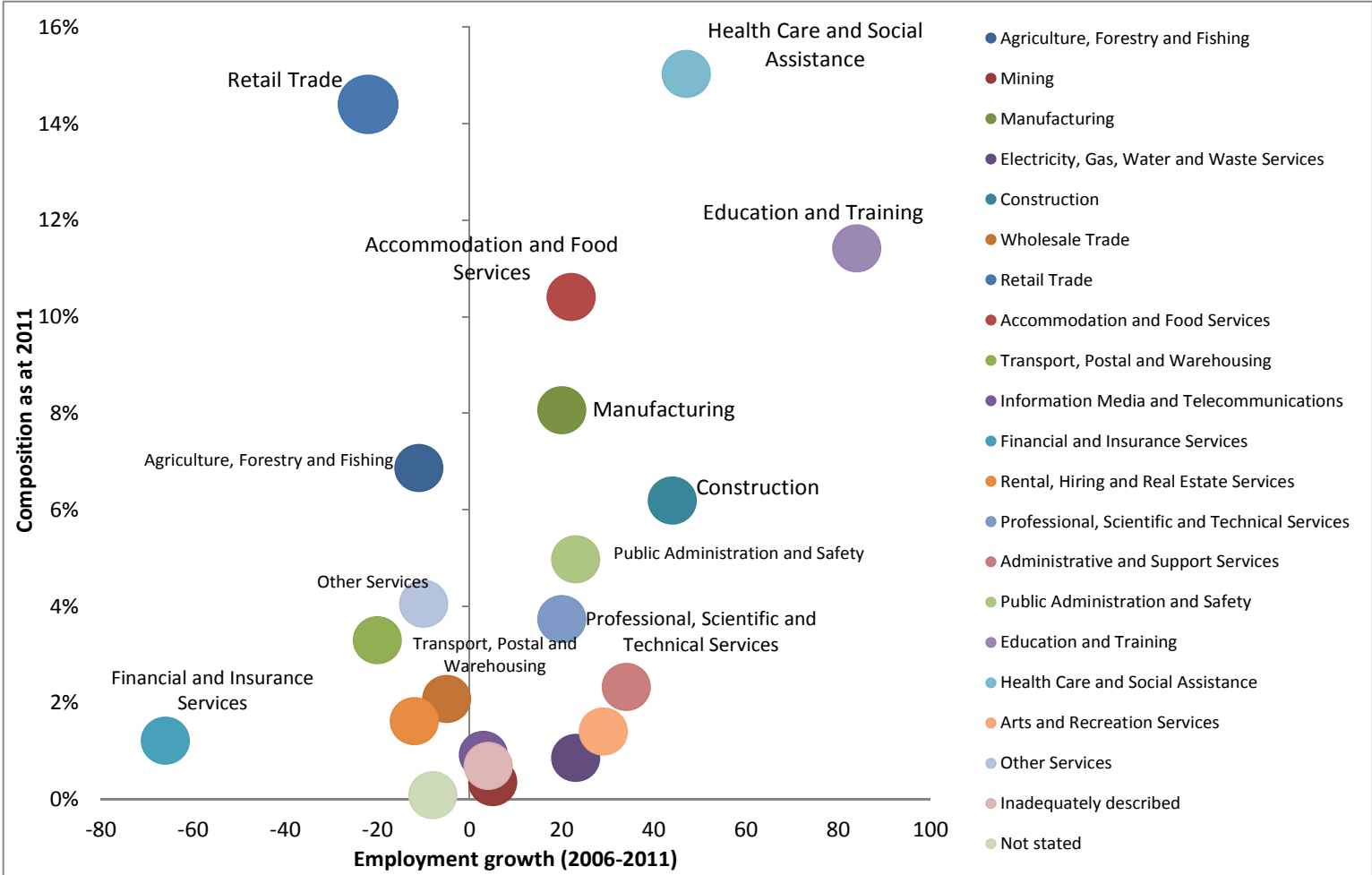
### 12.4.1 Industry composition

- The purpose of the current analysis is to generate an employment profile for the Nambucca LGA and identify the key emerging trends and drivers that have 'shaped' its workforce over the last five years.
- Our analysis of employment trends is based on jobs within the LGA rather than on working residents living within the LGA. This is because demand for employment land is supported by jobs and not residents.
- As at 2011, the Nambucca LGA supported 4,764 jobs, accounting for just 2.6% of total jobs in the North Coast region.
- Consistent with the North Coast average, employment within the Nambucca LGA is skewed to the services industry with Health Care and Social Assistance (15.0%), Retail Trade (14.4%), Education and Training (11.4%) and Accommodation and Food Services (10.4%) being the largest employers in the LGA.



- The high representation of Accommodation and Food Services and Retail Trade is reflective of the LGA's strong connection to tourism.
- At the same time, the LGA's employment base has a high profile of persons employed within primary industries and traditional value-add industries such as Construction, Manufacturing and Agriculture, Forestry and Fishing accounting for 21% of total jobs.
- The composition of persons employed in white collar industries is under the North Coast average – 17.9% in the Nambucca LGA vs. 20.6% in the North Coast region.
- Over the five year period to 2011, 204 new jobs were created in Nambucca LGA.
- Over the five year period, employment growth was greatest within Education and Training (+84 jobs), followed by Health Care and Social Assistance (+47 jobs) and Construction (+44 jobs).
- At the same time, there were 8 industries where there was a loss in employment. The losses were greatest within Financial and Insurance Services (-66 jobs), Retail Trade (-22 jobs) and Transport, Postal and Warehousing (-20 jobs).

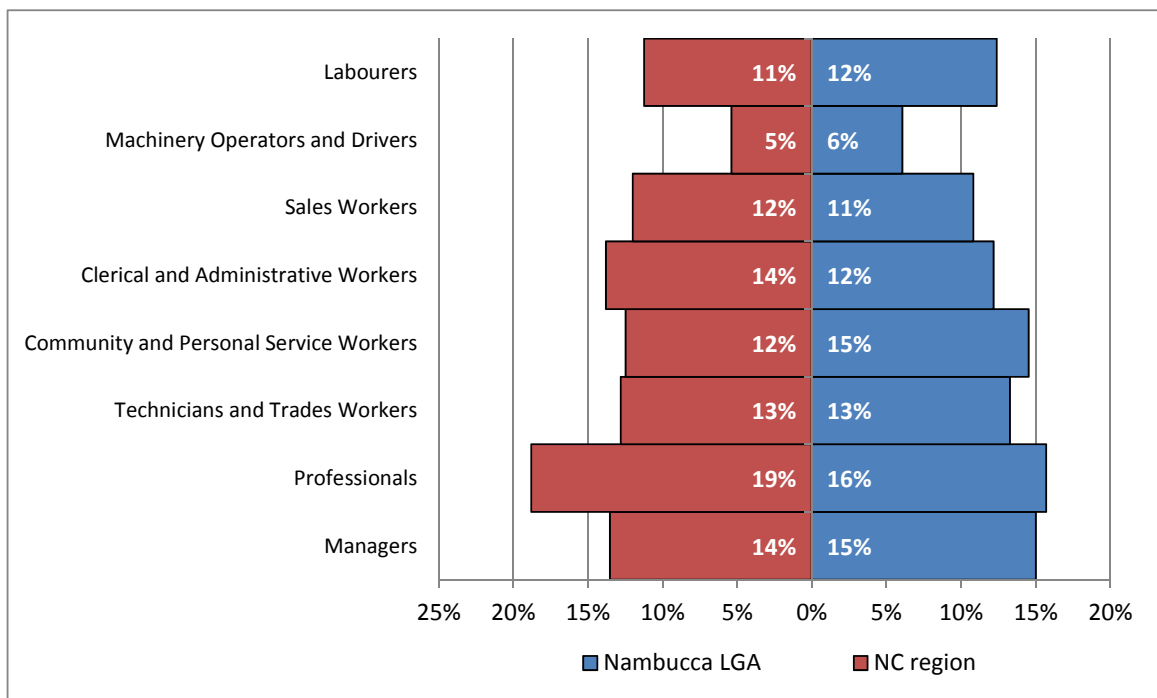
Figure 2. Employment composition and growth by industry, Nambucca LGA



### 12.4.2 Occupation profile

- The composition of occupations within the Nambucca LGA is diverse, with the majority ranging between 12% and 16%.
- As at Census 2011, approximately 16% of the workforce within the Nambucca LGA was employed within a 'Professional' capacity which is slightly under the North Coast average of 19%.
- The next two largest representative occupation types were Managers (15%), followed by Community and Personal Service Workers (15%).

**Figure 3. Occupation Composition (2011)**



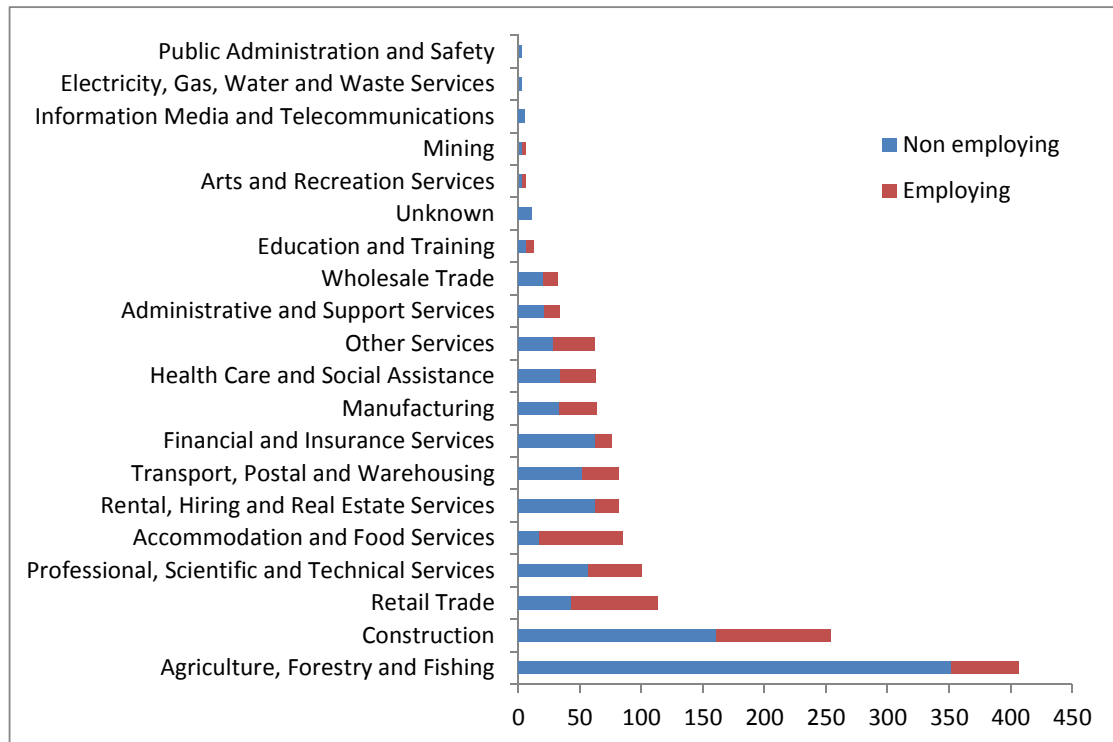
Source: ABS, MacroPlan Dimasi

### 12.4.3 Business composition & change

- As at June 2011, there were 1,502 businesses operating within the Nambucca LGA, with 65% of these non-employing or sole trader businesses.
- By industry, Agriculture, Forestry and Fishing industry entails the most businesses (407), followed by Construction (254) and Retail Trade (113).

- There were no businesses employing 200 or more persons in Nambucca LGA.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses decreased by 24.
- Business loss was most pronounced within employing businesses, particularly in the Construction industry (-19). In contrast, the number of employing businesses expanded by five in total.
- By industry, Professional, Scientific and Technical Services (+11) and Accommodation and Food Services (+10) incurred business growth.

#### 12.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Looking ahead, the Nambucca LGA like most other NC regions faces a number of issues, primarily centred on the ageing population.

- The aged population of the Nambucca is likely to have 2 major effects on the LGAs employment structure – high retirement of the workforce and a greater demand for medical services.
- Employment wise, Health Care and Social Assistance will continue to play an important role, aided by sustained growth in demand from an ageing Nambucca LGA resident population. While there has been a ‘capacity’ response (i.e. proposed and planned health projects), the main challenge will be to encourage and attract young workers to the region to fulfil this elevated level of demand.

## **12.5 Employment Land Supply**

### **12.5.1.1 Zoned Urban Employment Land**

- According to zoning layers issued by the Department of Planning and Environment (July 2014), MacroPlan Dimasi has obtained the amount of zoned employment land in Nambucca LGA.
- The information presented in this assessment is based on the Nambucca Local Environmental Plan 2010.
- In Nambucca LGA, there are three employment land use categories, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each.

<b>Classification</b>	<b>Land Use Zone</b>	<b>Area (ha)</b>	<b>%</b>
Business	B1. Neighbourhood Centre	0.6	0%
	B2. Local Centre	25.0	10%
	B3. Commercial Core	34.3	14%
	B4. Mixed Use	5.8	2%
	B7. Business Park	10.0	4%
	<b>Total</b>	<b>75.8</b>	<b>31%</b>
Industrial	IN1. General Industrial	150.4	62%
	IN2. Light Industrial	4.2	2%
	<b>Total</b>	<b>154.6</b>	<b>64%</b>
Special Uses	SP3. Tourist	10.4	4%
	<b>Total</b>	<b>10.4</b>	<b>4%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>240.7</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- There is 240.7 hectares of zoned urban employment land in Nambucca LGA.
- It is estimated approximately 64% of zoned is assigned to industrial uses (predominantly IN1 General Industrial), 31% to Business and about 4% for Special Uses.
- Combined, the five business zones (B1, B2, B3, B4 and B7) comprise 75.8 hectares of zoned urban employment land, with 78% of this provision zoned either B3 Commercial Core or B2 Local Centre.
- The Pacific Highway upgrade works are currently underway to the north of Nambucca Heads. Notably, approximately 9 hectares from the Valla Growth Area has been acquired for highway purposes.
- Land zoned for RU5 Village purposes has been excluded from this assessment of employment land need.

- According to the Department of Planning and Environment zoning layers, there is approximately 211.2 hectares of RU5 zoned land, with the largest single assignment being the Bowraville Town (100.7 hectares).















# Map 12.1

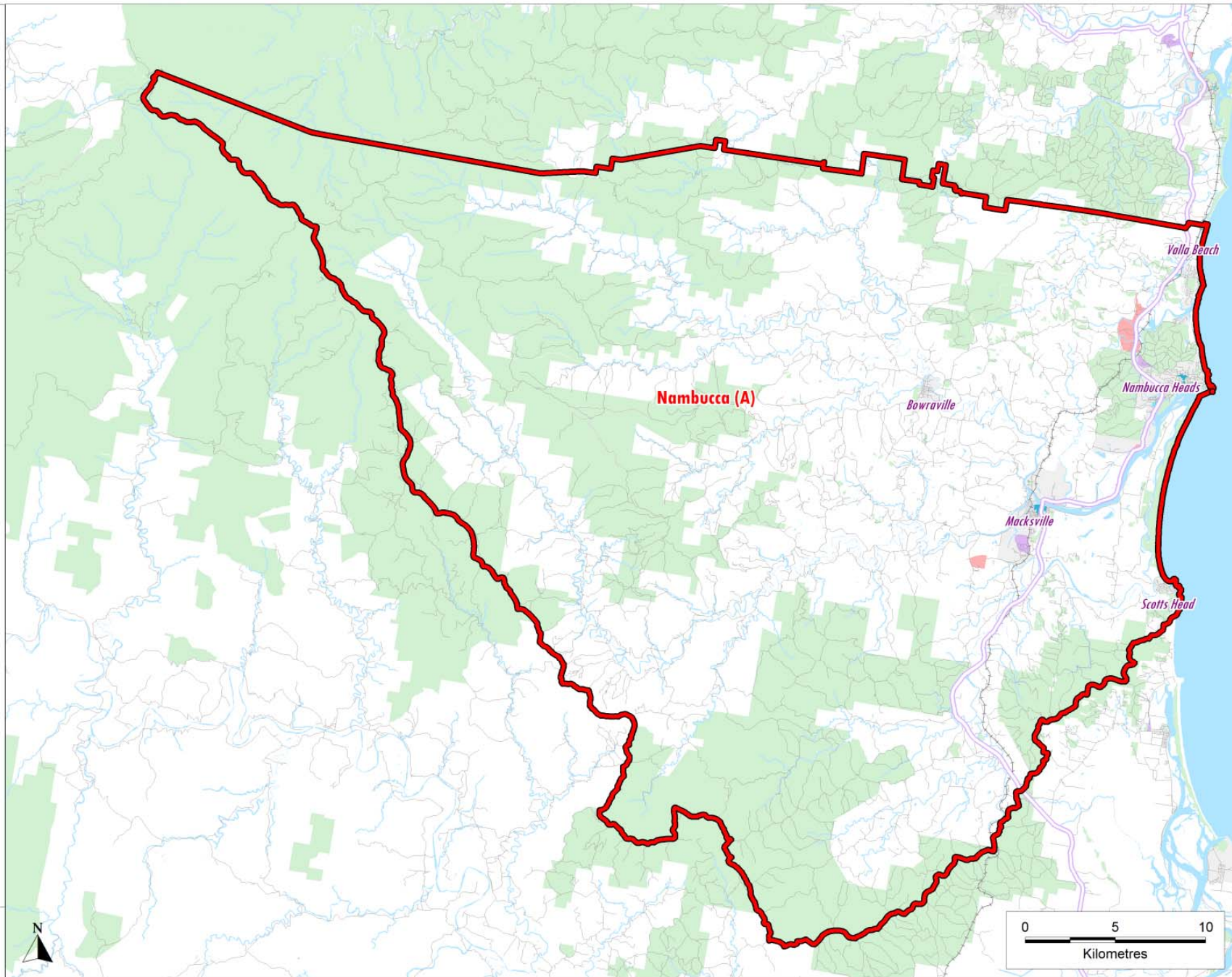
## Nambucca Shire Council Employment Land Zones

### Legend \*

 Nambucca Shire Council Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





# Map 12.2

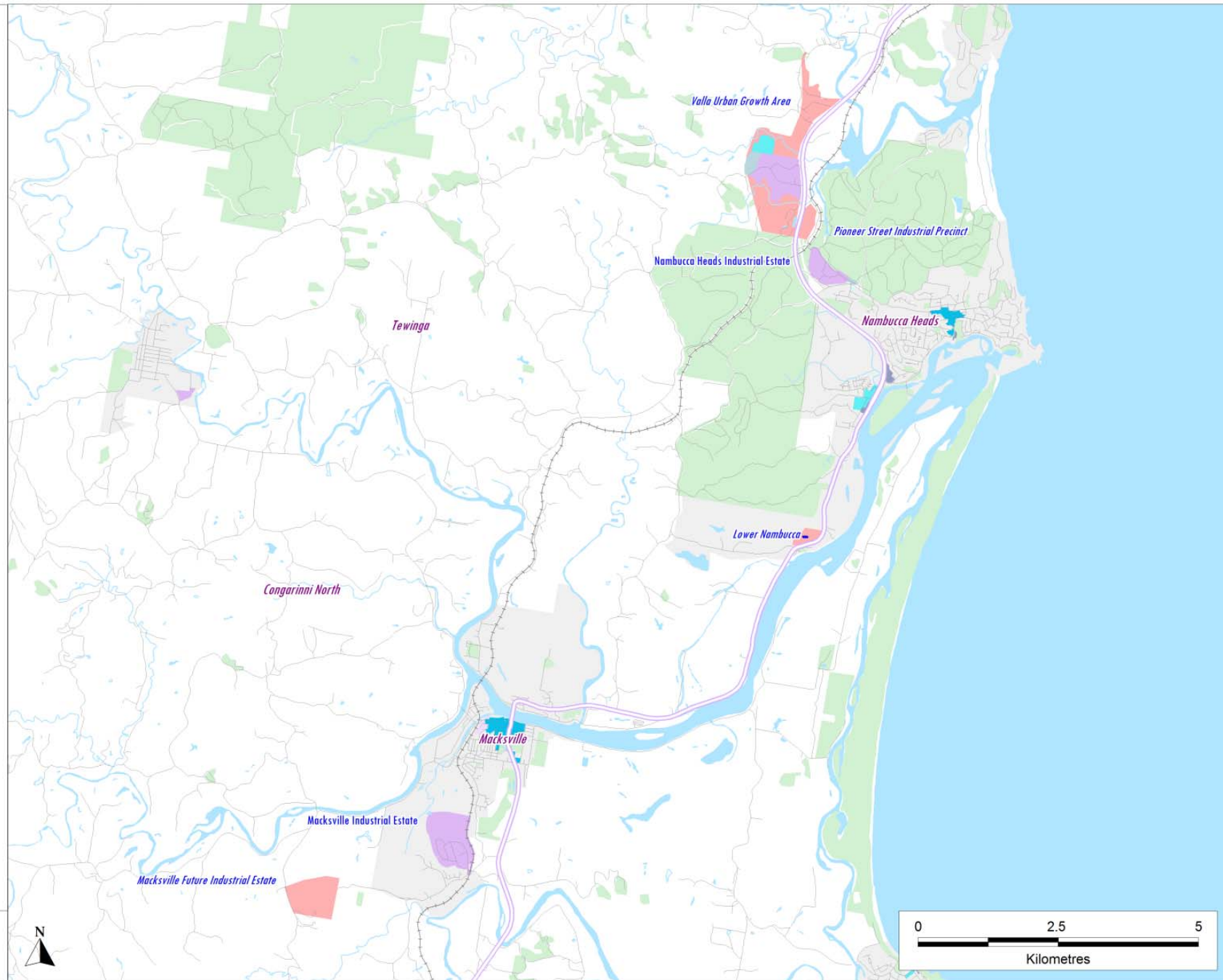
## Nambucca Heads & Macksville

### Employment Land Zones

Legend \*

Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 12.5.2 Industrial – Existing supply

- In the Nambucca LGA, two industrial land use zones are used i.e. IN1 General Industrial and IN2 Light Industrial.
- The majority of zoned industrial land is IN1 General Industrial (97%).
- As presented below, two precincts have been identified.

<b>Name</b>	<b>Total Area</b> (hectares)	<b>Developed</b> (hectares)	<b>Developed</b> (%)
Macksville Industrial Estate	50.0	30.0	60%
Nambucca Heads Industrial Estate	42.0	28.0	67%
<b>Total</b>	<b>92.0</b>	<b>58.0</b>	<b>63%</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our research include:

- Existing precincts occupy approximately 92.0 hectares of zoned industrial land.
- The **Macksville Industrial Estate** is located approximately 2km south of Macksville – at the periphery of the town and its surrounds. Through Upper Warrell Road, the precinct has access to the Pacific Highway, and more importantly key trade regional locations along the Eastern Seaboard.
- Existing uses at this precinct include general industrial manufacturers (Australian Precast Solutions and PCF industries), self-storage, Boral concrete, wholesalers (e.g. Geoff Andrews direct and Comet Windmills), transport (Classic coaches) and other local-orientated industrial businesses (e.g. Elite Pet Care, LSD Automotive, etc.).
- Both Macksville and Nambucca Heads Industrial Estates are evolving into sought after manufacturing destinations for companies wanting to be strategically placed. Competitively priced industrial land entailing good access

(via the Pacific Highway) to regional and larger capital destinations such as Sydney and Brisbane.

- Of the total, it is estimated that around 58.0 hectares or 63% of industrial zoned land is developed. Assuming that there are no constraints, it is estimated there is approximately 34.0 hectares of zoned capacity available for future development.
- At an observed floorspace ratio of 0.6:1, approximately 20.4 hectares of industrial floorspace that could be delivered through existing zoned industrial land (assuming there are no constraints).

### 12.5.3 Industrial – Future supply

- Approximately 195.9 hectares of future industrial land has been identified.
- With the exception of industrial land included in the Valla Urban Growth Area, the majority of identified future land is an extension of existing industrial estates.
- A summary of land areas and potential delivery times is presented in Table 12.10 below.

**Table 12.10**  
Future Industrial Precincts - Nambucca LGA

Precinct	Land Area (Hectares)	Timing (Years)
Valla Urban Growth Area*	86.9	10 - 20
Macksville Industrial Precinct	57.0	10 - 20
Pioneer Street Industrial Precinct	40.0	10 - 20
Lower Nambucca	12.0	10 - 20
<b>Total</b>	<b>195.9</b>	

*\* Includes land that may be constrained*  
*Source: MacroPlan Dimasi*

- The largest of the proposed future industrial destinations is the Valla Urban Growth Area. We note, some of this future precinct may be constrained.

- Covering 86.9 hectares, the site has been identified in the Mid North Coast Regional Strategy (2006) as a designated 'growth area'. Informed by Nambucca Shire Council, MacroPlan Dimasi acknowledges that around 52 hectares of the site is already zoned for industrial purposes. If required, there is opportunity for this precinct to be extended into the unzoned parcel of the growth area.
- Of the total allocation, MacroPlan Dimasi understands 9 hectares has been acquired for the Pacific Highway upgrade works.
- Expansion of the Macksville Industrial Precinct is to incorporate 57 hectares of land surrounding the precinct, which is expected to be delivered within the next 10 to 20 years.
- Notably, a heavy vehicle interchange, rest and service centre is under construction on the Nambucca Heads interchange of the Pacific Highway.

#### **12.5.4 Retail & Commercial – Existing supply**

The resident population of the Nambucca Shire LGA in 2014 is approximately 19,550 persons, with tourism visitation to the LGA equating to an additional year-round population of about 1,300 persons. A population of this scale, which is relatively small in the context of the surrounding LGAs, coupled with the competitive influence of major retail/commercial facilities in higher order centres such as Coffs Harbour and to a lesser extent, Port Macquarie, means that the Nambucca Shire LGA does not support a comprehensive retail/commercial centres hierarchy. The centres hierarchy provides a range of convenience based retail/commercial goods and services, with a focus on tourism in certain locations.

The Nambucca Shire LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 12.3 and Map 12.4.

- The Nambucca Shire LGA centres hierarchy generally consists of the following structure, as defined in the NSCEL:
  - Town Centres: Macksville, Nambucca Heads and Bellwood.

- Smaller scale coastal and inland villages (such as Valla Beach, Scotts Head and Bowraville).

### **Macksville Town Centre**

- The Macksville Town Centre is the primary retail and commercial activity centre in the Nambucca Shire LGA, located on the southern side of the Nambucca River. All of the business zoned land in main town centre core is zoned B3 (24.6 ha). According to a recent land use audit for Macksville, approximately 9 hectares of B3 zoned land is presently used for residential purposes, reducing the total provision to approximately 15.6 hectares. There is a disconnected precinct several hundred metres to the south that includes the Macksville Woolworths supermarket and some surrounding commercial development.
- Having regard to the NSCEL (referencing the Hill PDA 2007 study), we estimate there to be about 13,000 sq.m of retail and commercial floorspace within the Macksville Town Centre (and nearby B2 zone), including a 2,900 sq.m Woolworths, a 1,350 sq.m Foodworks supermarket and a small Mitre 10.

### **Nambucca Heads Town Centre**

- The Nambucca Heads Town Centre (including the Bellwood commercial precinct) provides a mix of business zoned land in two separate precincts. The entire town centre provides 25.0 ha of business zoned the land, including 0.6 ha of B1 zoned land, 9.3 ha of B2 zoned land and 9.7 ha of B3 zoned land.
- The Nambucca Heads commercial precinct includes the B1 and B3 zoned land identified above and a small parcel of B4 land, supporting a functional retail/commercial main street, with an orientation towards tourists, and including a 2,400 sq.m Woolworths supermarket.
- The Bellwood commercial precinct, is considered part of the Nambucca Heads Town Centre in the MNCRS, but is considered separately in the NSCEL. The precinct includes 9.3ha of B2 zoned land identified above, as well as two parcels of B4 zoned land either side of the Pacific Highway. A large proportion of the B2 parcel remains vacant, with the northern part accommodating the existing Supa IGA supermarket anchored Nambucca Heads Shopping Centre.

### **Other centres/villages**

There are a several smaller centres/villages, located elsewhere across the LGA, which generally provide a very limited range of retail and commercial facilities, and serve the convenience needs of local residents and localised tourism populations or passing traffic. The two main centres are Valla Beach and Scotts Head, while Bowraville does not provide any business zoned land, it does include some retail/commercial development including a small IGA supermarket.



# Map 12.3



## Nambucca Shire Council

### Retail Provision

#### Legend \*

-  Nambucca Shire Council Boundary

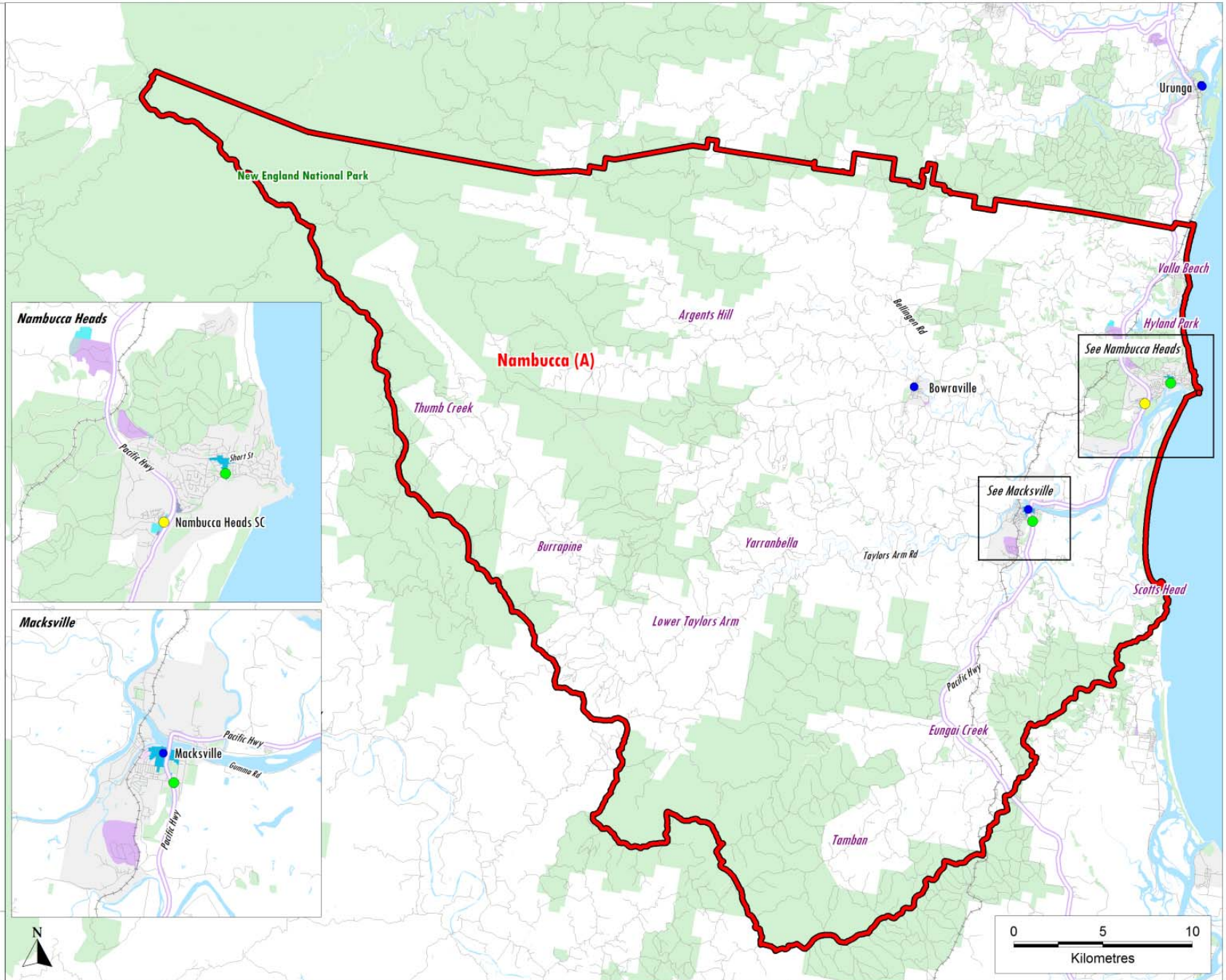
#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

#### Retail Competition

-  Woolworths
-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)
-  Potential Smkt

\* Hollow symbols indicate proposed stores





# Map 12.4

## Nambucca Shire Council

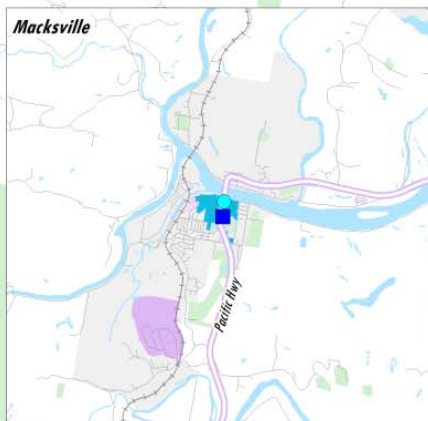
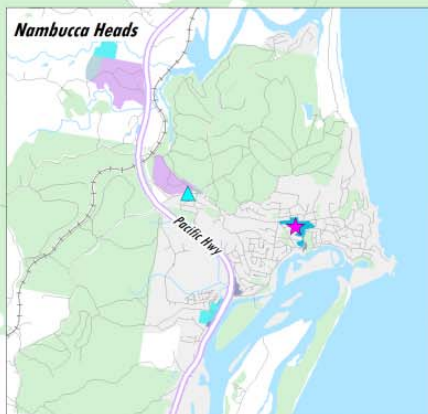
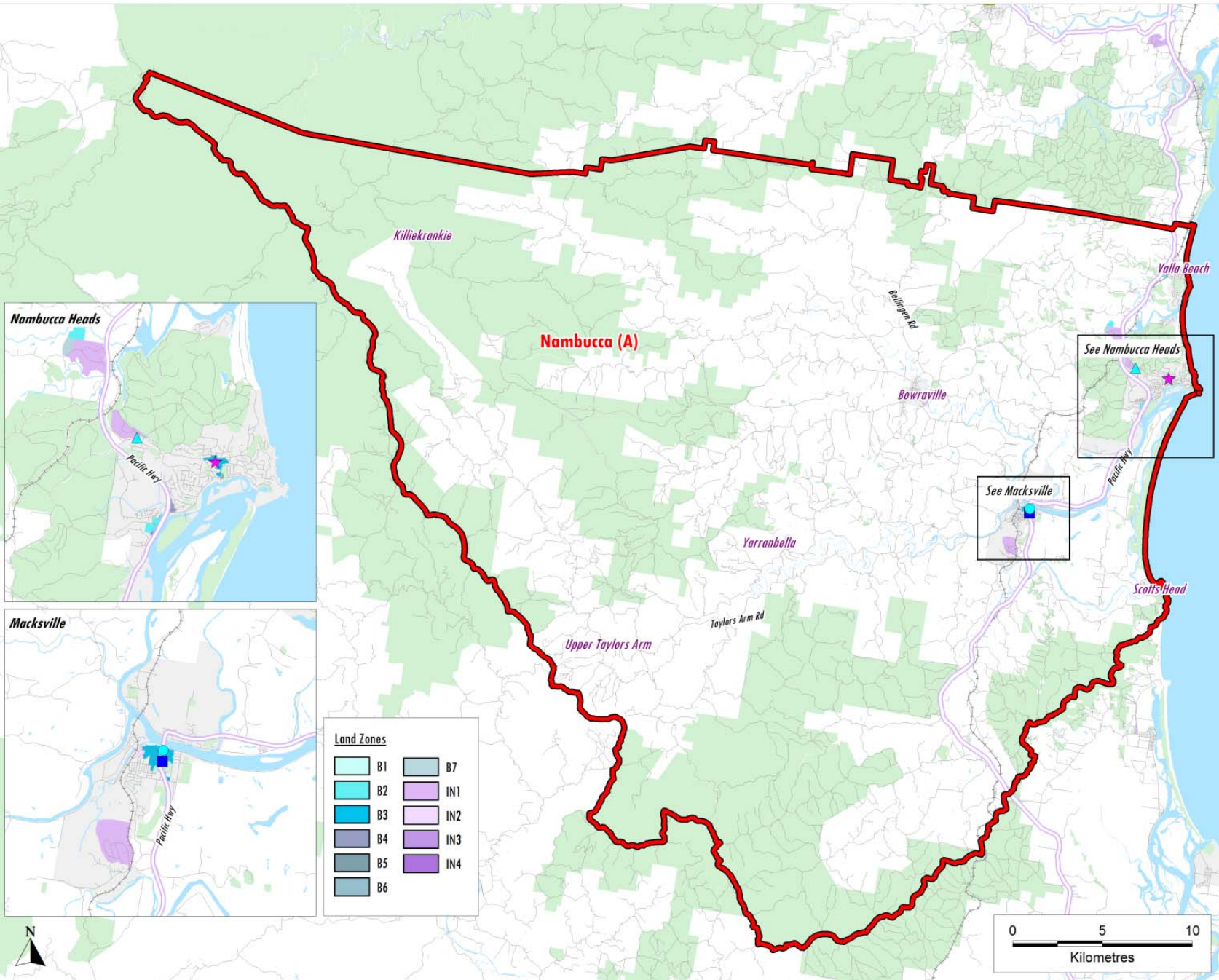
### Bulky/ Homemaker Centres












#### Legend \*

 Nambucca Shire Council Boundary

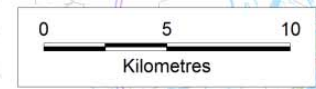
#### Bulky Goods Retailers

-  Mitre 10
-  Repco
-  Carpet Court
-  Betta Home Living



Land Zones			
	B1		B7
	B2		IN1
	B3		IN2
	B4		IN3
	B5		IN4
	B6		

\* Hollow symbols indicate proposed stores





### **Business zoned land capacity for retail and commercial floorspace**

Table 12.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **75.8 hectares of business zoned land** within the Nambucca LGA, of which 0.6 ha is B1 zoned land, 25.0 ha is B2 zoned land and 34.3 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There are also 5.8 ha of B4 zoned land and 10 ha of B7 zoned land across the LGA.
- We have applied FSRs for each business zone type from Nambucca LEP 2010 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.

Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Nambucca LGA to be in the order of 797,537 sq.m.

**Table 12.11**  
Nambucca LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1*	0.6	0.9	5,485
Total B2*	25.0	1.2	287,677
Total B3	34.3	1.0	343,137
Total B4	5.8	1.1	61,211
Total B7	<u>10.0</u>	<u>1.0</u>	<u>100,026</u>
<b>Total LGA</b>	<b>75.8</b>		<b>797,537</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

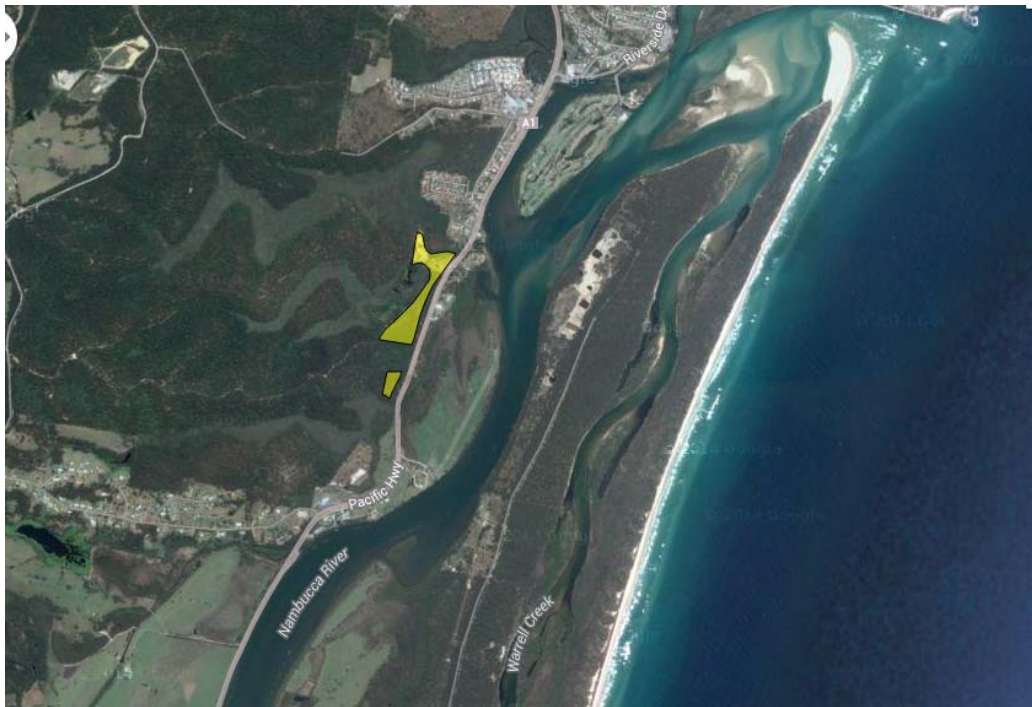
### 12.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within the Nambucca LGA.

### 12.5.6 Special Uses – Existing supply

- As per the Nambucca LEP 2010, there are two categories within ‘Special Use’ zoning; SP2 Infrastructure and SP3 Tourist.
- Cemeteries, waste management facilities, classified roads, sewerage treatments plants and water supply systems and other miscellaneous uses have been excluded from our estimates of urban employment land for this zoning category have been excluded.
- As a result, Special Uses comprises wholly of SP3 Tourist zoning, totalling 10.4 hectares.

**Figure 5. Satellite Image of SP3 Tourist Allocation**



*Source: SIX maps (NSW Department of Planning and Environment)*

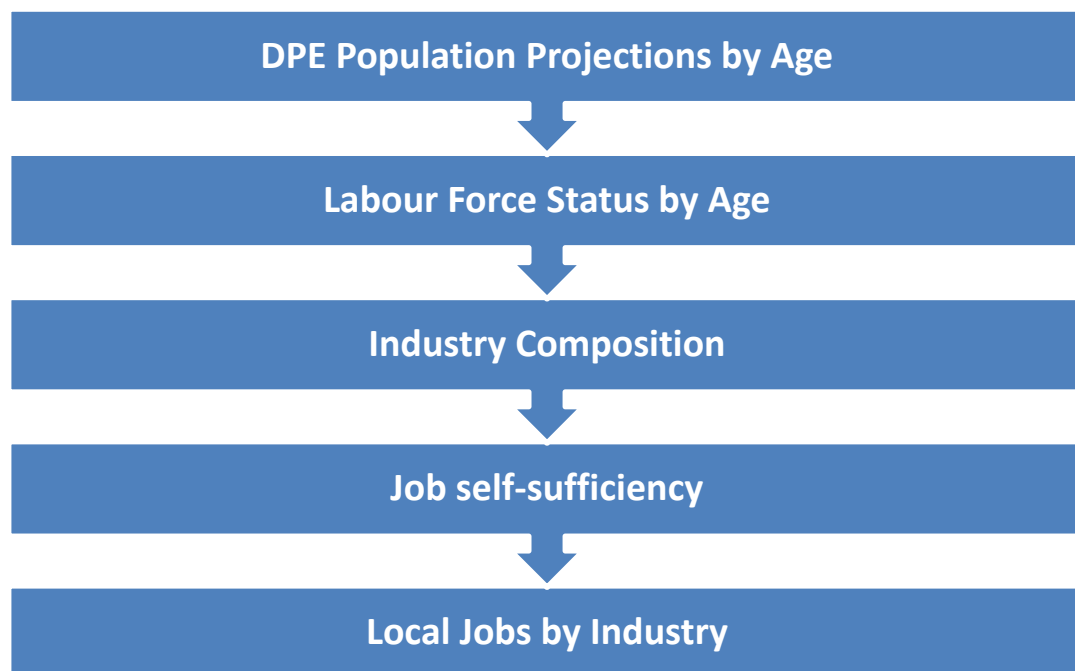
### 12.5.7 Special Uses – Future supply

- While not zoned for Special Uses, a private primary school (on Upper Warrell Creek Road, Macksville) has been approved and construction certificate released.
- Special Uses in the Nambucca LGA comprises wholly of SP3 Tourist zoning. There are currently no upgrades or infrastructure facilities planned within this land use zone.
- Additionally, whilst not specifically categorised under special use zoning, the 2014/15 state budget allocated \$50 million to hospitals which is inclusive of the Macksville District Hospital.

## 12.6 Demand for employment land

### 12.6.1 Methodology

- In order to calculate the quantity of commercial, industrial and special use land required in the Nambucca LGA, we first generate employment projections.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Nambucca LGA to deliver employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections
- The flowchart below depicts the process used to derive employment forecasts for the Nambucca LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  - Converting jobs by industry into specific built form types

- Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 12.6.2 Employment Projections

- Following 204 job additions during the 2006-2011 period, the Nambucca LGA workforce is expected to expand by an extra 489 jobs over the forecast period (i.e. 2011 to 2031).
- Over the ten years to 2021, our employment projections imply a 207 job increase for the Nambucca LGA. As at 2021, the LGA is projected to support 4,971 jobs.
- By 2031, employment in the LGA is expected to increase further to 5,253, which represents growth of 282 jobs since 2021.
- At an average growth rate of 24 jobs per annum over the 2011 to 2031 period, the projected rate of employment growth is below that observed over the five years to 2011 (average job growth of 41 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+130), Accommodation and Food Services (+92), Education and Training (+86) and Retail Trade (+65).
- Conversely, outright job losses is predicted for four industries, with the greatest reductions expected in Manufacturing (-51) and Agriculture, Forestry and Fishing (-28).

**Table 12.12**  
**Employment by Industry - Nambucca LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	716	784	846	130
Accommodation and Food Services	496	544	588	92
Education and Training	544	591	630	86
Retail Trade	686	706	751	65
Construction	295	304	336	41
Professional, Scientific and Technical Services	178	193	210	32
Transport, Postal and Warehousing	157	174	189	32
Wholesale Trade	99	114	126	27
Rental, Hiring and Real Estate Services	77	80	100	23
Electricity, Gas, Water and Waste Services	41	48	62	21
Other Services	193	199	210	17
Financial and Insurance Services	58	67	71	13
Administrative and Support Services	111	116	123	12
Public Administration and Safety	237	244	247	10
Mining	17	18	24	7
Arts and Recreation Services	67	72	65	-2
Information Media and Telecommunications	44	39	42	-2
Agriculture, Forestry and Fishing	327	313	299	-28
Other*	37	0	0	-37
Manufacturing	384	365	333	-51
<b>Total</b>	<b>4,764</b>	<b>4,971</b>	<b>5,253</b>	<b>489</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 12.13**  
Industry and Land Use Conversion Matrix - Nambucca LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	20%	0%	80%	100%
Health Care and Social Assistance	0%	40%	0%	60%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

**Table 12.14**  
Employment Additions by Land Use Type - Nambucca LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	1	1	7	12	0	0
Construction	1	3	8	29	0	0
Wholesale Trade	12	9	3	2	0	0
Retail Trade	19	43	1	2	0	0
Accommodation and Food Services	33	31	14	13	0	0
Transport, Postal and Warehousing	3	3	14	12	0	0
Information Media and Telecommunications	0	2	0	0	0	0
Financial and Insurance Services	9	4	0	0	0	0
Rental, Hiring and Real Estate Services	3	20	0	0	0	0
Professional, Scientific and Technical Services	15	17	0	0	0	0
Administrative and Support Services	5	7	0	0	0	0
Public Administration and Safety	7	3	0	0	0	0
Education and Training	9	8	0	0	37	32
Health Care and Social Assistance	27	25	0	0	41	37
Arts and Recreation Services	4	0	0	0	0	0
Other Services	6	11	0	0	0	0

Note: These figures may be subject to rounding

Source: MacroPlan Dimasi

### 12.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Nambucca LGA (presented in Table 12.15).

**Table 12.15**

**Indicative Employment Density by Industry and Land Use Type - Nambucca LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in Table 12.16.



**Table 12.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Nambucca LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	130	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	30	50	1,680	2,980	0	0
Construction	30	100	1,140	4,420	0	0
Wholesale Trade	370	280	610	470	0	0
Retail Trade	750	1,720	140	320	0	0
Accommodation and Food Services	1,670	1,560	2,150	2,010	0	0
Transport, Postal and Warehousing	100	90	2,720	2,420	0	0
Information Media and Telecommunications	0	70	0	0	0	0
Financial and Insurance Services	230	100	0	0	0	0
Rental, Hiring and Real Estate Services	70	500	0	0	0	0
Professional, Scientific and Technical Services	380	420	0	0	0	0
Administrative and Support Services	130	160	0	0	0	0
Public Administration and Safety	160	80	0	0	0	0
Education and Training	370	320	0	0	1,860	1,600
Health Care and Social Assistance	1,080	990	0	0	2,440	2,230
Arts and Recreation Services	180	0	0	0	0	0
Other Services	230	450	0	0	0	0
<b>Total</b>	<b>5,780</b>	<b>6,890</b>	<b>8,450</b>	<b>12,750</b>	<b>4,300</b>	<b>3,830</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **5,780 sq.m of commercial, 8,450 sq.m of industrial and 4,300 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **6,890 sq.m of commercial, 12,750 sq.m of industrial and 3,830 sq.m of special uses** floorspace is expected to materialise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in the following table.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 12.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Nambucca LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	90	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	20	40	1,260	2,240	0	0
Construction	20	70	850	3,320	0	0
Wholesale Trade	280	210	460	350	0	0
Retail Trade	570	1,290	100	240	0	0
Accommodation and Food Services	1,250	1,170	1,610	1,510	0	0
Transport, Postal and Warehousing	80	70	2,040	1,810	0	0
Information Media and Telecommunications	0	50	0	0	0	0
Financial and Insurance Services	170	70	0	0	0	0
Rental, Hiring and Real Estate Services	60	370	0	0	0	0
Professional, Scientific and Technical Services	280	320	0	0	0	0
Administrative and Support Services	100	120	0	0	0	0
Public Administration and Safety	120	60	0	0	0	0
Education and Training	280	240	0	0	1,390	1,200
Health Care and Social Assistance	810	740	0	0	1,830	1,670
Arts and Recreation Services	130	0	0	0	0	0
Other Services	180	340	0	0	0	0
<b>Total</b>	<b>4,350</b>	<b>5,160</b>	<b>6,330</b>	<b>9,560</b>	<b>3,220</b>	<b>2,870</b>

Source: MacroPlan Dimasi

- The Alternative scenario indicate **4,350 sq.m of commercial, 6,330 sq.m of industrial** and **3,220 sq.m of special use** floorspace will materialise by 2021.
- With the exception of the special uses category, floorspace demand is anticipated to rise relative to the prior ten year period. Over the ten years to 2031, an additional **5,160 sq.m of commercial, 9,560 sq.m of industrial** and **2,870 sq.m of special uses** of floorspace is required.

#### 12.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Nambucca LGA has been obtained from July 2014 Department of Planning and Environment GIS layers. Observed FSRs include:
  - B3 Commercial Core 1:1
  - B4 Mixed Use 1.0-1.6:1 and
  - SP3 Tourist 1:1
- According to Department GIS layers, there are no specific FSR references for industrial (i.e. IN1 General Industrial and IN2 Light Industrial) and some business land use zones (i.e. B1 Neighbourhood Centre, B2 Local Centre and B7 Business Park) in the Nambucca LGA. For these land use zonings, an average for the broader North Coast region has been used in this assessment.
- As such, a FSR of 1:1 has been applied across all business zones, 0.6:1 for industrial uses and 0.8:1 for Special Uses.
- Based on derived floorspace requirements and these average floorspace ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial**, **2.6–3.5 hectares of industrial** and **0.8–1.0 hectares of special uses** land will be required by 2031.

Table 12.18

Demand for Employment Land (2031) - Nambucca LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	1.0 - 1.3	1.0	1.0 - 1.3
Industrial	1.6 - 2.1	0.6	2.6 - 3.5
Special Uses	0.6 - 0.8	0.8	0.8 - 1.0

Source: MacroPlan Dimasi

### 12.6.5 Demand for retail floorspace

The potential drivers of future demand for retail floorspace in the Nambucca Shire LGA are summarised below:

- Population growth – which is expected to be low, growing at an average of 0.4% per annum to 2031 (a net increase of 7.3% or 1,400 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 12.19 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Nambucca Shire LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 12.19 shows the following:

- The residential population of the Nambucca Shire LGA generates approximately **37,800 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **1.9 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **8,000 sq.m** by 2031, an increase of about **21%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **2,500 sq.m**, and is expected to increase by about **500 sq.m** by 2031.

Total retail demand growth equates to an equivalent land requirement of **1.7 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

**Table 12.19**  
**Nambucca LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\***

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	19,550	19,750	20,150	20,450	20,650	0.3%
Tourism equiv. pop	1,282	1,295	1,322	1,341	1,354	0.3%
<b>Retail exp. (\$M)</b>						
Food & liquor	108	110	118	125	133	1.2%
Food catering	24	25	27	29	31	1.5%
Apparel	18	18	19	19	20	0.7%
Household	38	39	40	42	43	0.7%
Leisure	11	11	12	12	13	1.0%
General	19	20	21	23	24	1.4%
Retail services	<u>6</u>	<u>6</u>	<u>6</u>	<u>7</u>	<u>7</u>	<u>1.0%</u>
<b>Total</b>	<b>224</b>	<b>229</b>	<b>243</b>	<b>257</b>	<b>271</b>	<b>1.1%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	6,000	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	11,959	12,263	13,060	13,903	14,726	1.2%
Food catering	4,057	4,181	4,507	4,858	5,210	1.5%
Apparel	3,196	3,245	3,371	3,501	3,617	0.7%
Household	12,783	12,979	13,482	14,001	14,466	0.7%
Leisure	1,788	1,824	1,919	2,018	2,111	1.0%
General	3,219	3,311	3,552	3,809	4,065	1.4%
Retail services	<u>1,001</u>	<u>1,022</u>	<u>1,075</u>	<u>1,130</u>	<u>1,182</u>	<u>1.0%</u>
<b>Total</b>	<b>37,773</b>	<b>38,656</b>	<b>40,961</b>	<b>43,395</b>	<b>45,750</b>	<b>1.3%</b>
Floorspace per capita	1.93	1.96	2.03	2.12	2.22	0.8%
<b>Tourism demand</b>						
Equiv. tourism pop.	1,282	1,295	1,322	1,341	1,354	0.3%
Floorspace per capita	<u>1.93</u>	<u>1.96</u>	<u>2.03</u>	<u>2.12</u>	<u>2.22</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>2,477</b>	<b>2,535</b>	<b>2,686</b>	<b>2,846</b>	<b>3,001</b>	<b>1.1%</b>
<b>Total retail demand (sq.m)</b>	<b>40,251</b>	<b>41,191</b>	<b>43,647</b>	<b>46,242</b>	<b>48,750</b>	<b>1.1%</b>
<b>Demand growth (14-31)</b>					<b>8,500</b>	
<b>Estimated land take (ha)</b>					<b>1.7</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 12.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Nambucca LGA. The market position has been derived having regard for stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Nambucca LGA.

Key findings pertaining to our gap assessment are presented in Table 12.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	75.8	25.0	0.0	25.0	2.8	22.2
Industrial	154.6	34.0	195.9	229.9	3.1	226.8
Special Uses	10.4	3.7	0.0	3.7	0.9	2.8

Source: MacroPlan Dimasi

- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 22.2 hectares*
  - *Supply of industrial land will exceed demand by 226.8 hectares*
  - *Supply of special uses land will exceed demand by 2.8 hectares*
- Generally, our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Nambucca LGA out to 2031.
- It is recognised that the Nambucca LGA will need to plan for more special uses zoned land to accommodate demand for Health Care and Social Assistance post 2031 - as it is estimated there will only be 2.8 hectares available as at 2031.
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Nambucca LGA.

- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Nambucca LGA relative to that suggested in this land assessment, particularly for emerging businesses and industries.
- Due to land constraints, it is believed some future demand for health service purposes could be accommodated within business zoned land.
- As such, rezoning of sites at the periphery of existing commercial cores, towns centres (i.e. local and neighbourhood) and around non-constrained special use allocations may represent a practical approach to delivering more 'special use' land in Nambucca LGA.

## 12.8 Conclusions

### 12.8.1 Commercial, Industrial and Special Uses

Population growth in the Nambucca LGA has been moderate, with the number of residents increasing by 936 over the five years to 2011. During this period, persons aged 65+ in Nambucca increased substantially (589 persons), while net declines were registered in traditional working age cohorts (20-34 and 35-49).

Over the five years to 2011, net migration into Nambucca LGA totalled 788 persons. Notably, a net increase was achieved for all age groups except for the 20-34 age group – consistent with broader regional trends.

The retention of young workers is a key issue for the Nambucca LGA. Faced with limited opportunity and industry diversity, young working adults leave Nambucca in search of jobs in major regional and capital cities.

The top four employing industries are service based, and generally serve the local needs of residents e.g. Health Care and Social Assistance (15.0%), Retail Trade (14.4%), Education and Training (11.4%), and Accommodation and Food Services (10.4%). Collectively, these industries engage around 51% of the local workforce. Notably, manufacturing is the next largest employing industry,

accounting for 8.1% of the Nambucca's labour force – consistent with a large allocation of zoned land for industrial uses.

Employment growth has been steady. Over the five years to 2011, there were 204 new job additions, the majority of which occurred in Education and Training (+84 jobs), Health Care and Social Assistance (+47 jobs) and Construction (+44 jobs). Large contractions in Financial and Insurance Services (-66 jobs), Retail Trade (-22 jobs) and Transport, Postal and Warehousing (-20 jobs) were observed the five year period.

Key economic and demographic drivers and associated outcomes for the Nambucca LGA include:

- DPE projections indicate population growth will ease from current levels (0.4% per annum out to 2031). Poor retention of young working adults expected to continue.
- Ageing within the local population to accelerate, prompting investment in health capacity and aged care (already commenced).
- Consolidation in agriculture industry and increased competition from international manufacturers to result in job losses in these two industries.
- Four core service industries (e.g. Health Care and Social Assistance, Retail Trade, Education and Training and Accommodation and Food Services) and Transport, Postal and Warehousing to provide jobs growth in the future.

Our projections indicate **9,510–12,670 sq.m of commercial, 8,500 sq.m of retail, 15,890–21,200 sq.m of industrial** and **6,090–8,130 sq.m of special use** floorspace will be required by 2031.

Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **1.0–1.3 hectares of commercial, 1.7 hectares of retail, 2.6–3.5 hectares of industrial** and **0.8–1.0 hectares of special uses** land will be required by 2031.



Generally, our assessment has concluded that there is sufficient zoned employment land to accommodate the future employment needs of the Nambucca LGA out to 2031. It is estimated:

- *Supply of business land will exceed demand by 22.2 hectares*
- *Supply of industrial land will exceed demand by 226.8 hectares*
- *Supply of special uses land will exceed demand by 2.8 hectares*

It is recognised that the Nambucca LGA will need to plan for more special uses zoned land to accommodate demand for Health Care and Social Assistance post 2031 - as it is estimated there will only be 2.8 hectares available as at 2031.

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Nambucca LGA. Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Nambucca LGA relative to that suggested in this land assessment, particularly for emerging businesses and industries.

Due to land constraints, it is believed some future demand for health service purposes could be accommodated within business zoned land.

As such, rezoning of sites at the periphery of existing commercial cores, towns centres (i.e. local and neighbourhood) and around non-constrained special use allocations may represent a practical approach to delivering more 'special use' land in Nambucca LGA.

### **12.8.2 Retail**

We make the following conclusions in relation to retail market conditions within the Nambucca Shire LGA:

- Future population growth is expected to be weak, averaging about 0.4% per annum over the period to 2031, an increase of about 7.3% on current levels, or just 1,400 additional persons. By 2031, the population of the LGA is expected to be 20,650 which is considered too small to support a higher order, sub-regional type retail facilities. Generally, discount department stores tend to be provided per 35,000 – 40,000 persons.
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 8,500 sq.m (a 21% uplift) by 2031, equivalent to about 1.7 ha of land demand.
- Existing retail demand is estimated at 40,250 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 797,537 sq.m. However because the retail offer in the Nambucca LGA is relatively limited (given the small population), we estimate leakage of about 25% beyond the LGA to centres such as Coffs Harbour and Port Macquarie, resulting in net demand of about 30,200 sq.m, increasing to 36,600 sq.m by 2031.
- The NSCEL assessed the potential future demand for retail and commercial floorspace across Nambucca having regard to three sources of population projections. The previous series of NSW DPE projections, are similar in outlook as the updated 2014 population projections from the NSW DPE. AEC Group/GHD appear to have estimated future retail floorspace demand growth of 17,000 sq.m over the 20 year period between 2011 and 2031, which is considerably higher than our estimated growth in demand. These projections appear to be based on an assumption of real growth of 1.2-1.6% per annum and no growth in the retail turnover densities. We do not consider this outlook to be realistic and therefore, we consider the previous outlook over-estimated future retail floorspace demand.
- The Nambucca LEP 2010 provides more than enough business zoned land to support future retail floorspace growth in the LGA. We expect that demand for future retail space in Macksville will be limited given that centre now supports a 2,900 sq.m Woolworths supermarket.
- There is a significant, under-developed B2 precinct at Bellwood Road, that includes the Supa IGA anchored Nambucca Heads shopping centre. This

precinct appears to only be about 30-40% utilised and could comfortably absorb additional retail floorspace demand.

- Our preliminary analysis indicates that the existing land stock will **be sufficient to support the future retail demand growth across the LGA.**
- Having regard for existing capacity within the centres, we recommend that there is sufficient capacity to realise demand within existing business zone allocations. Although, if new formats were to emerge that are not suited to business zoned land, or require large land parcels, then these could be accommodated in alternative locations.

## Section 13: LGA Analysis – Kempsey

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Kempsey LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Kempsey LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Kempsey LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as has considered feedback from the D&PE and Kempsey Shire Council.

### 13.1 Key facts, findings and take-outs

#### 13.1.1 Population growth

- Between 2006 and 2011, the resident population of Kempsey LGA increased by 1,096 persons.
- Persons aged 50-64 and 65+ experienced the greatest population growth, increasing by 734 and 820 respectively.

- Over the five years to 2011, net migration to Kempsey LGA totalled 406 persons.
- People moving from Sydney and overseas contributed the bulk of net migration gain to Kempsey LGA.
- DPE projections suggest population growth will recede from current levels, from 0.8% to 0.2% per annum out to 2031.

### 13.1.2 Employment trends

- As at 2011, the Kempsey LGA supported 8,807 jobs, accounting for 5% of the North Coast workforce.
- The employment profile of the Kempsey LGA is consistent with the broader North Coast region, with high representation in the Health Care and Social Assistance industry (15.1%).
- Over the five year period to 2011, 619 new jobs were created in Kempsey LGA.
- Health Care and Social Assistance and Construction incurred the largest employment growth of all industries, expanding by 322 and 139 jobs respectively.

### 13.1.3 Employment land

- In Kempsey LGA, there are 406 hectares of land zoned for urban employment purposes – comprising of 28% Business, 68% Industrial and 4% Special Uses.
- Following jobs growth over the five years to 2011 (124 jobs per annum), employment growth in the Kempsey LGA is expected to continue over the forecast period – albeit, at a slower pace. Over the twenty years to 2031, it is expected the workforce will expand by an average of 35 jobs per annum.
- As such, our estimates of demand indicate **14,270–19,030 sq.m of commercial, 11,510 sq.m of retail, 26,350–35,120 sq.m of industrial and 11,480–15,300 sq.m of special use** of floorspace will be required by 2031.

- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **1.4–1.9 hectares of commercial**, **2.3 hectares of retail**, **4.4–5.9 hectares of industrial** and **1.4–1.9 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available to accommodate future employment needs over the forecast period. Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 60.6 hectares*
  - *Supply of industrial land will exceed demand by 197.9 hectares*
  - *Supply of special uses land will exceed demand by 10.7 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kempsey LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Kempsey LGA, particularly for new and emerging industries.

## 13.2 Literature review

The Mid North Coast Regional Strategy (MNCRS) designates Kempsey Major Town Centre as the primary centre in the LGA, supported by the town of South West Rocks and a series of inland and coastal villages.

Additionally, the Kempsey and South West Rocks Industrial Land Review 2004 aimed to review the existing supply of industrial land and determine likely demand and locations for future supply. The following key points were taken from this document:

- Traditionally Kempsey has a strong industrial base (manufacturing).
- Key employment sectors have historically comprised of the retail trade, manufacturing and education.
- Key industry sectors consist of native hardwood, food processing, joinery/building, heavy vehicle, and clothing (Akubra).
- Service industry includes light industry catering to local market e.g. automotive repairs, trade supplies, and storage.
- General industry comprises larger scale markets e.g. food processing, heavy vehicle sales.
- Based on the Kempsey and South West Rocks Industrial Land Review 2004, existing industrial land supply in Kempsey is 107.64 ha. Of the 107.6 hectares, 14.33 ha is undeveloped and unconstrained.
- Existing industrial land in South West Rocks is 7.46 ha. Of which, 3.88 ha is undeveloped and unconstrained. Existing types comprise mainly of building supplies, vehicle storage, workshops, landscaping/hardware supplies.
- Existing industrial land in Kempsey will meet requirements for service industry to 2016, while South West Rocks does not have adequate supply and will require an additional 0.5 - 1.5ha to 2016.

### **13.3 Socio-demographic trends**

#### **13.3.1 Population change**

- According to ABS Estimated Resident Population (ERP) figures, the resident population of Kempsey LGA was 29,128 at 2011, showing an increase of 1,096 persons over the five years to 2011.

Table 13.1

## Estimated Resident Population (persons) - Kempsey LGA

Year	Estimated Resident Population	Total Change (persons)
2001	27,164	
2006	28,032	868
2011	29,128	1,096

Source: ABS

- Consistent with other North Coast regions, population growth over the five years to 2011 was accompanied by an ageing resident population profile.
- Persons aged 50-64 and 65+ represented the greatest population growth, increasing by 734 and 820 respectively.
- Minimal growth was recorded in the 20-34 age cohort, while outright losses were experienced within traditional 'family' cohorts (0-19 & 35-49).

Table 13.2

## Population By Age (persons) - Kempsey LGA

Age cohort	2006	2011	Change (2006-2011)	Composition
0-19	7,639	7,618	-21	26%
20-34	3,854	3,947	93	14%
35-49	5,740	5,210	-530	18%
50-64	5,986	6,720	734	23%
65+	4,813	5,633	820	19%
<b>Total</b>	<b>28,032</b>	<b>29,128</b>	<b>1,096</b>	<b>100%</b>

### 13.3.2 Migration movements

Inward and outward movements for the Kempsey LGA have been analysed using 2006 and 2011 Census data (Place of Usual Residence).



- Between 2006 and 2011, net migration into Kempsey LGA totalled 406 persons.
- People moving from Sydney and overseas contributed the bulk of net migration gain.
- Consistent with other North Coast LGAs, the 50-64 age cohort incurred the largest net migration intake with 410 persons.
- There was a considerable net loss of persons aged 20-34 (less 317 persons).

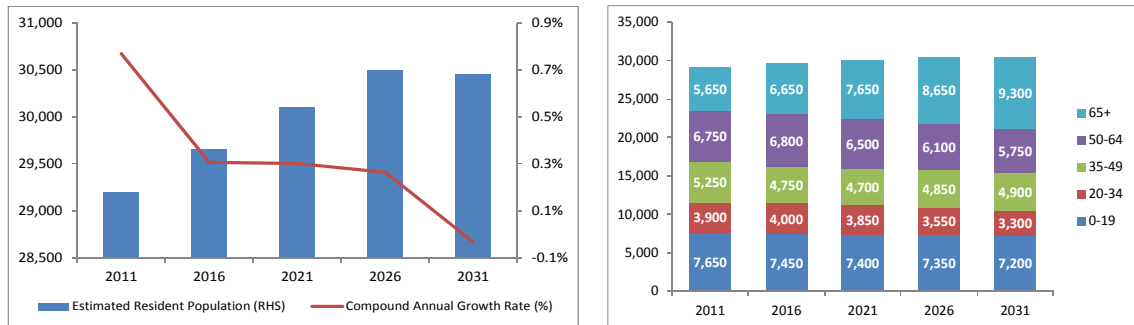
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	-6	-28	-71	-41	-66	-212
Sydney	106	-43	153	235	63	514
Regional NSW	-89	-149	61	99	48	-30
Interstate	-59	-164	67	90	5	-61
Overseas	39	67	53	27	9	195
<b>Total Net Migration</b>	<b>-9</b>	<b>-317</b>	<b>263</b>	<b>410</b>	<b>59</b>	<b>406</b>

Source: ABS

### 13.3.3 Population projections

- According to the DP&E (2014) projections, the population of Kempsey LGA is projected to expand to 30,500 by 2031.
- It is anticipated that population growth will average 67 persons per annum over the 20 year period (2011-2031).
- With the exception of the 65+ cohort, all age groups are expected to incur reductions over the forecast period.

**Figure 1. Projected Population (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

### 13.3.4 Labour force status

- Of all residents in Kempsey LGA, around 80% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 48% i.e. 10,274 of 21,464 residents<sup>11</sup>.
- Of residents in the labour force, 91% are employed and 9% are unemployed and seeking working.
- The Kempsey LGA's employment rate resembles that which is observed across the North Coast generally (92%).

<sup>11</sup> ABS Census Population and Housing 2011

Table 13.4

## Labour Force Status by Age (number) - Kempsey LGA

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	630	138	768	964	1,732
20 - 29	1,191	211	1,402	865	2,267
30 - 39	1,605	173	1,778	798	2,576
40 - 49	2,253	176	2,429	987	3,416
50 - 59	2,474	155	2,629	1,543	4,172
60 - 69	1,047	59	1,106	2,658	3,764
70 - 79	130	3	133	2,053	2,186
80 - 84	21	0	21	686	707
85+	8	0	8	636	644
<b>Total</b>	<b>9,359</b>	<b>915</b>	<b>10,274</b>	<b>11,190</b>	<b>21,464</b>

Source: Census of Population and Housing (2011)

### 13.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Kempsey LGA.
- Approximately 81.8% of Kempsey employed residents also worked in the LGA.
- The remaining 18.2% of working residents travel either to other North Coast LGAs (6.3%) or locations outside the North Coast (12.0%) for work.
- Popular workplace destinations in other North Coast LGAs include Port Macquarie–Hastings (4.4%) and (1.4%).

**Table 13.5**  
**Job Containment - Kempsey LGA**

	<b>Value</b>
Working residents	9,245
<u>Place of Work (number)</u>	
Kempsey	7,562
North Coast LGAs (ex. Kempsey)	578
Outside North Coast	1,105
<b>Total</b>	<b>9,245</b>
<u>Job Containment (%)</u>	
Kempsey	81.8%
North Coast LGAs	6.3%
Other	12.0%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Job containment by industry for the Kempsey LGA is presented below.
- Relative to the all industries average for Kempsey LGA (81.8%), eleven industries achieved a higher rate of job containment.
- Of all industries, the top three performing industries for job containment are Rental, Hiring and Real Estate Services (94.4%), Retail Trade (91.0%) and Arts and Recreation Services (90.5%).
- Evidently, there is an overt relationship between job containment and service denominated industries in Kempsey LGA.

Table 13.6  
Job Containment by Industry - Kempsey LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	94.4%	5.6%	0.0%	100.0%
Retail Trade	91.0%	4.6%	4.4%	100.0%
Arts and Recreation Services	90.5%	0.0%	9.5%	100.0%
Financial and Insurance Services	90.4%	5.6%	4.0%	100.0%
Accommodation and Food Services	89.5%	3.6%	6.9%	100.0%
Education and Training	88.2%	6.4%	5.4%	100.0%
Wholesale Trade	87.8%	2.5%	9.7%	100.0%
Health Care and Social Assistance	85.0%	8.9%	6.1%	100.0%
Other Services	84.1%	3.9%	12.0%	100.0%
Public Administration and Safety	83.0%	7.8%	9.2%	100.0%
Agriculture, Forestry and Fishing	82.2%	5.4%	12.4%	100.0%
Professional, Scientific and Technical Services	81.5%	6.7%	11.7%	100.0%
Manufacturing	80.6%	8.7%	10.7%	100.0%
Transport, Postal and Warehousing	71.9%	6.4%	21.7%	100.0%
Administrative and Support Services	70.9%	6.0%	23.2%	100.0%
Information Media and Telecommunications	69.2%	6.2%	24.6%	100.0%
Electricity, Gas, Water and Waste Services	62.9%	18.1%	19.0%	100.0%
Construction	59.2%	5.6%	35.2%	100.0%
Mining	42.4%	0.0%	57.6%	100.0%
<b>Across all industries</b>	<b>81.8%</b>	<b>6.3%</b>	<b>12.0%</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

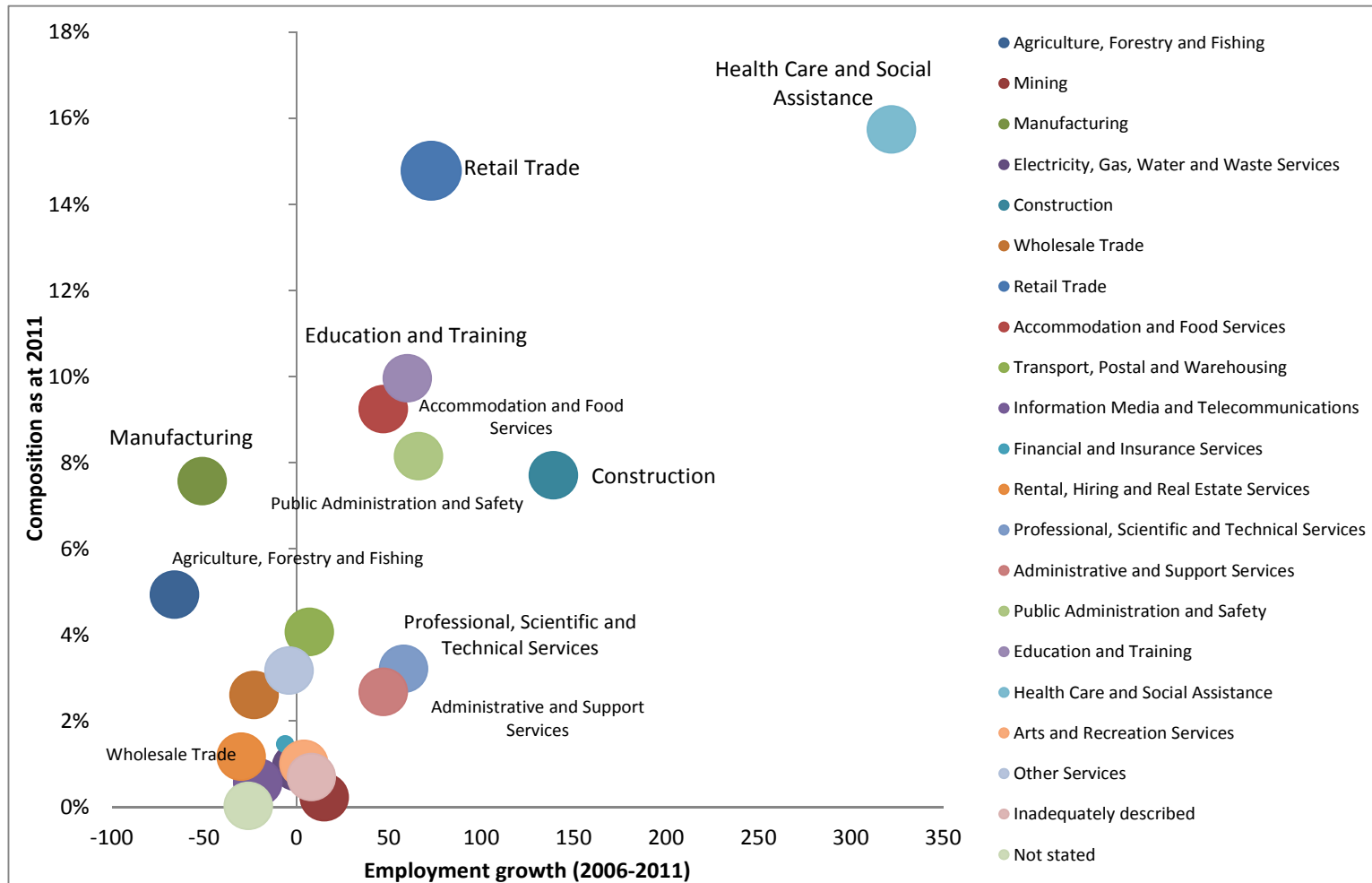
## 13.4 Employment and labour market trends

### 13.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for Kempsey LGA and identify key emerging trends and drivers that have 'shaped' and influenced its workforce over the last five years.
- Our analysis of employment trends focuses on jobs within Kempsey LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, Kempsey LGA supported 8,807 jobs, accounting for less than 5% of all jobs in the North Coast region.
- The employment profile of Kempsey LGA is similar to that of the wider North Coast region with an apparent skew to Health Care and Social Assistance industry (15.1%).

- The subsequent four largest employing industries in Kempsey LGA were Retail Trade (14.8%), Education and Training (10.0%), Accommodation and Food Services (9.2%) and Public Administration and Safety (8.2%).
- In comparison to the North Coast regional average, a greater proportion of the workforce in Kempsey LGA is engaged in Public Administration and Safety; 8.2% (Kempsey LGA) versus 5.8% (North Coast region).
- Over the five year period to 2011, 619 new jobs were created in Kempsey LGA. Health Care and Social Assistance and Construction industries incurred the highest employment growth of all industries, expanding by 322 and 139 jobs respectively over the five year period.
- Eight industries experienced outright reductions, with job losses most prevalent in the labour intensive industries of Agriculture, Forestry, Fishing (-66) and Manufacturing (-51).

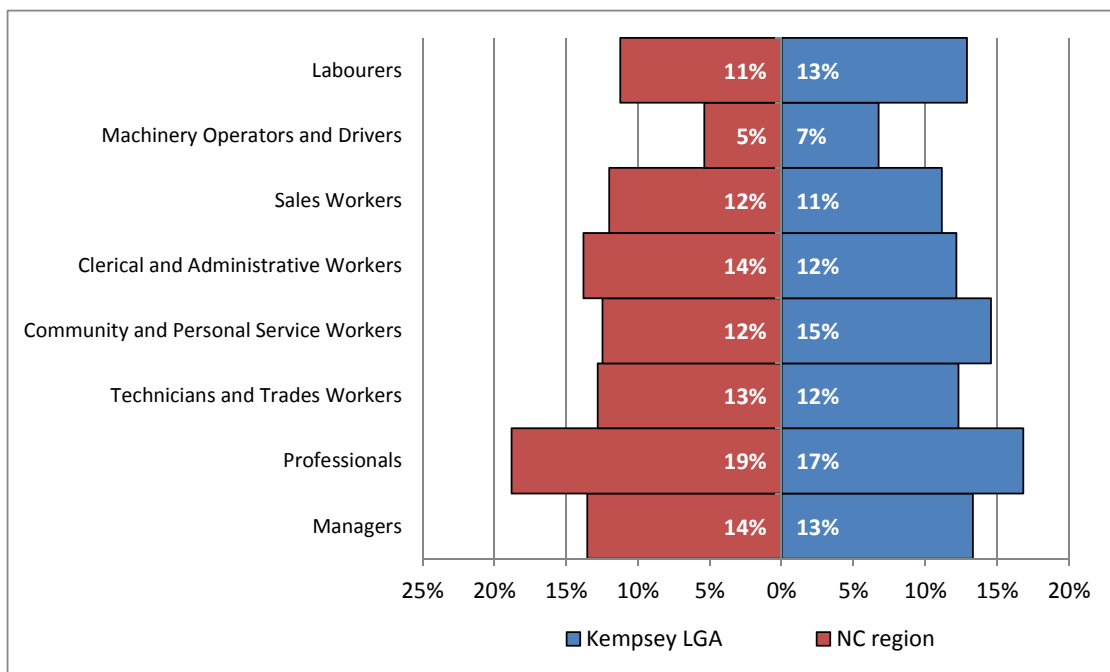
Figure 2. Employment composition and growth by industry, Kempsey LGA



### 13.4.2 Occupation profile

- According to 2011 Census, approximately 17% of the workforce within Kempsey LGA was employed within a 'Professional' capacity.
- The next two largest occupation types represented were Community and Personal Service Workers (15%), followed by Labourers (13%).
- Kempsey LGA has a slightly lower representation of Professionals and Managers in comparison to the North Coast average; however it has a larger representation of persons employed in Community and Personal Service.

**Figure 3. Occupation Composition (2011)**



Source: ABS, MacroPlan Dimasi

### 13.4.3 Business composition & change

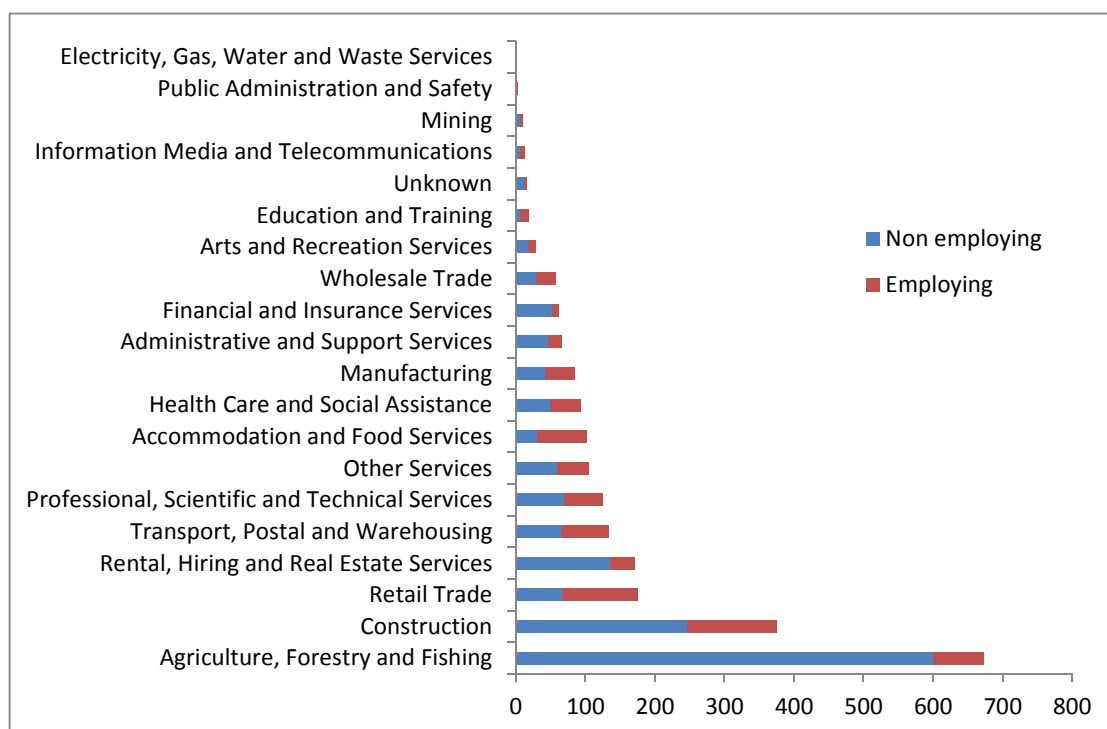
- As at June 2011, 2,308 businesses were operating within Kempsey LGA, 67% of which were non-employing/sole trading businesses.<sup>12</sup>

<sup>12</sup> 8165.0 – Counts of Australian Businesses, including Entries and Exits, June 2009 to June 2013



- Consistent with the broader business profile of the North Coast region, Agriculture, Forestry and Fishing (672) had the most businesses, followed by Construction (375) and Retail Trade (175).
- Whilst Health Care and Social Assistance is the dominant employing industry within the LGA (15.7% of total jobs), the sector only accounted for 4% of businesses in the Kempsey LGA.
- At June 2011, there were no businesses employing 200 or more persons within Kempsey LGA.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses in Kempsey LGA contracted by 49 in total.
- Other Services (+7), Public Administration and Safety (+6) and Education and Training (+3) incurred business growth.

- Concurrently, business closures were apparent across 13 industries, with the largest reductions observed in Accommodation and Food Services (-14), Manufacturing (-12) and Construction (-11).

**Table 13.7**  
**Business Composition and Change - Kempsey LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	0	-2	-2
Retail Trade	4	-7	-3
Accommodation and Food Services	-3	-11	-14
Education and Training	3	0	3
Construction	-13	2	-11
Public Administration and Safety	-3	9	6
Manufacturing	1	-13	-12
Professional, Scientific and Technical Services	2	-3	-1
Other Services	7	0	7
Transport, Postal and Warehousing	0	-3	-3
Agriculture, Forestry and Fishing	-1	-4	-5
Administrative and Support Services	8	-12	-4
Wholesale Trade	-4	2	-2
Rental, Hiring and Real Estate Services	-1	1	0
Financial and Insurance Services	1	0	1
Arts and Recreation Services	-1	0	-1
Electricity, Gas, Water and Waste Services	0	-3	-3
Information Media and Telecommunications	0	0	0
Mining	0	0	0
Not Classified	1	-6	-5
<b>Total</b>	<b>1</b>	<b>-50</b>	<b>-49</b>

Source: ABS

#### 13.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- In line with other LGAs of similar size, the Kempsey LGA has a narrow jobs base that skewed to population related services. The region is under-represented in the traditional white collar employing industries of professional and technical services.
- At the same time, the aged population of the LGA is likely to place considerable strain on local health services in coming years, which will be further compounded by the retirement of the aged workforce.

## 13.5 Employment Land Supply

### 13.5.1 Zoned Urban Employment Land

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in Kempsey LGA.
- The information presented in this assessment accords with Kempsey Local Environmental Plan 2013.
- In Kempsey LGA, there are three employment land use categories, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	4.1	1%
	B2. Local Centre	10.2	3%
	B3. Commercial Core	42.0	10%
	B6. Enterprise Corridor	56.1	14%
	<b>Total</b>	<b>112.4</b>	<b>28%</b>
Industrial	IN1. General Industrial	265.1	66%
	IN2. Light Industrial	7.3	2%
	<b>Total</b>	<b>272.4</b>	<b>68%</b>
Special Uses	SP2. Infrastructure	3.0	1%
	SP3. Tourist	13.5	3%
	<b>Total</b>	<b>16.5</b>	<b>4%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>401.3</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*


- In Kempsey LGA, there are **401.3 hectares of zoned urban employment land**.

- Representing the largest allocation, approximately 68% of zoned land is dedicated to industrial uses, 28% for Business and 4% for Special Uses.
- Within the four business zones (B1, B2, B3, and B6), there is approximately 56.1 hectares assigned to B6 Enterprise Corridor, 42.0 hectares to B3 Commercial Core, 10.2 hectares to B2 Local Centre and 4.1 hectares to B1 Neighbourhood Centre.

# Map 13.1













## Kempsey Shire Council

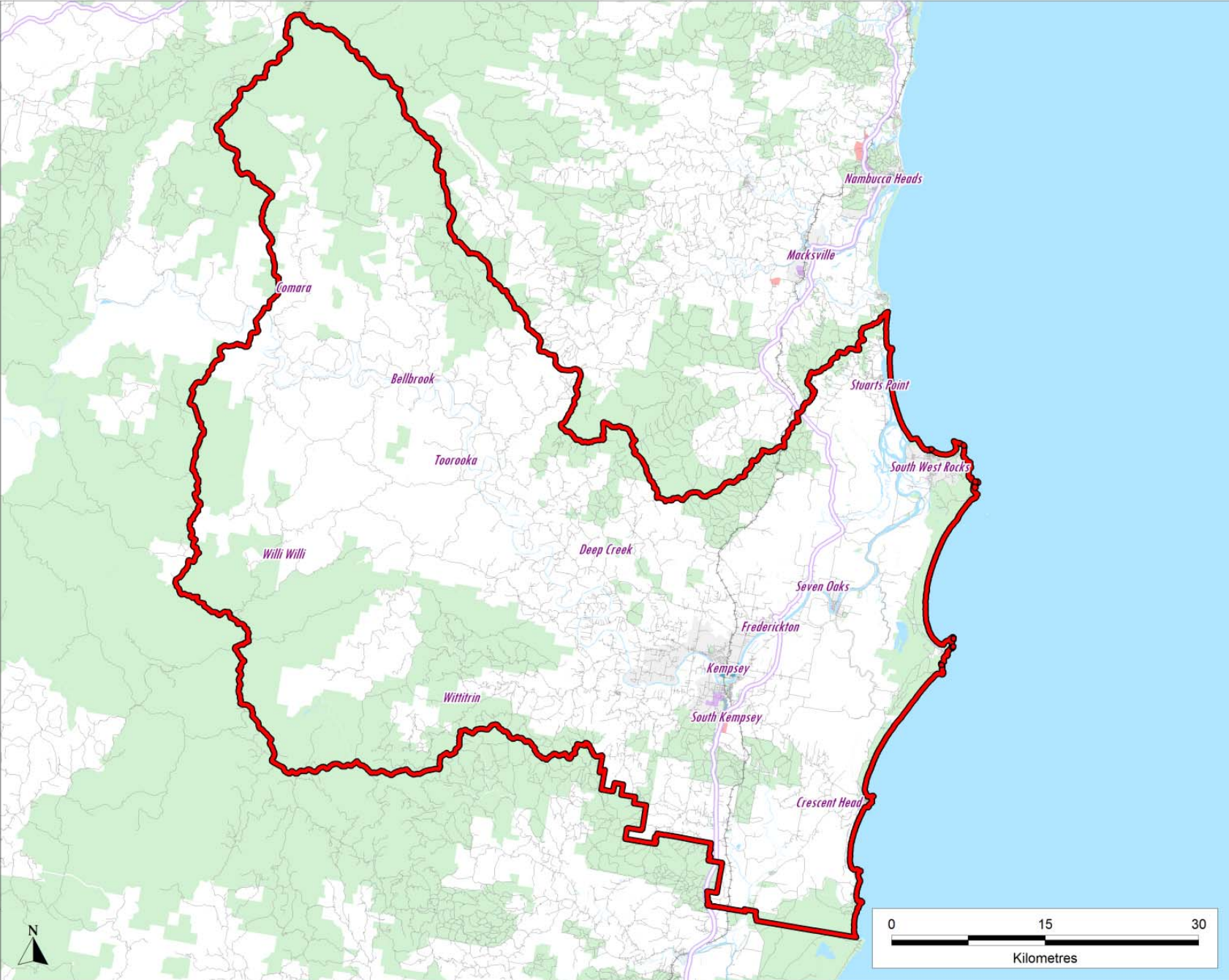
### Employment Land Zones

 Kempsey Shire Boundary

#### Legend \*

##### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





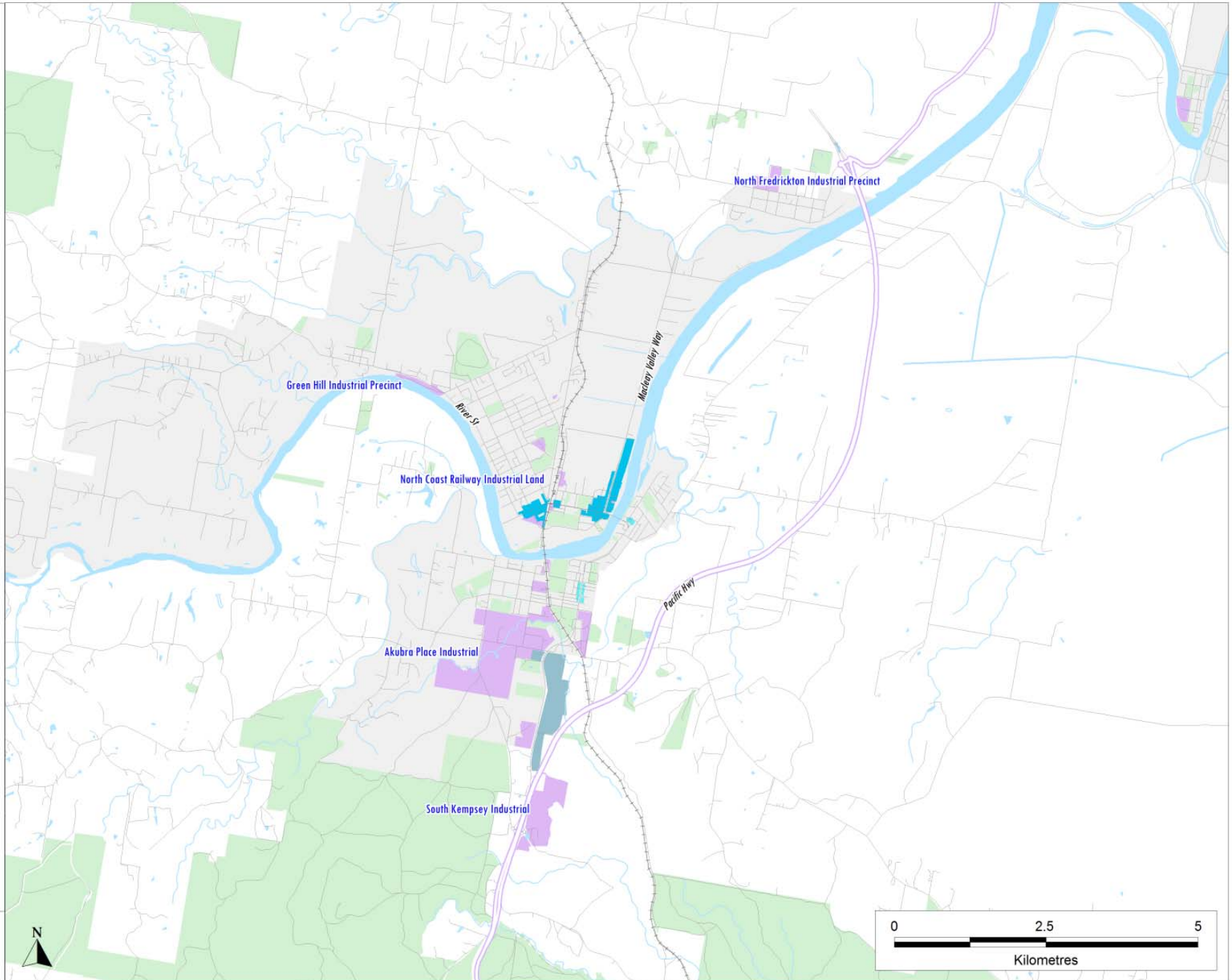
# Map 13.2

## Kempsey Employment Land Zones

**Legend\***

**Land Zones**

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 13.5.2 Industrial – Existing supply

- Two industrial land use zones are applied in Kempsey LGA i.e. IN1 General Industrial and IN2 Light Industrial.
- Our review of existing industrial supply has revealed there are two significantly developed existing industrial precincts in Kempsey LGA.

**Table 13.9**

**Established Industrial Precincts - Kempsey LGA**

<b>Name</b>	<b>Total Area (hectares)</b>	<b>Developed (hectares)</b>	<b>Developed (%)</b>
Akubra Place Industrial Precinct	170.0	80.0	47%
South Kempsey Industrial Precinct	100.0	70.0	70%
<b>Total</b>	<b>270.0</b>	<b>150.0</b>	<b>56%</b>

Source: MacroPlan Dimasi

Key findings pertinent to existing industrial precincts include:

- The **Akubra Place Industrial Precinct** is located west of the Macleay Valley Way and South Street junction. The precinct is around 2-3 km from the Pacific Highway, 2 km from rail infrastructure and the Kempsey Commercial Core. Existing uses include Akubra Australia and associated product manufacturing and warehouse facilities, Boral concrete, a metal recycler and other smaller service industries.
- The **South Kempsey Industrial Precinct** is located east of the Macleay Valley Way and Pacific Highway interchange. It is less than 5 km from the 'Kempsey Major Town Centre'. At present the precinct is occupied by the South Kempsey Gravel Quarry.
- Of the total, it is estimated that around 150 hectares or 56% of this land is developed. Kempsey Shire Council has advised that there are a number of constraints to future development including flooding and environmental factors.

As such, it is estimated that there is approximately 80 hectares of zoned land available for future development.

- Allowing for an average floor space ratio of 0.6:1, this equates to approximately 48 hectares of industrial floorspace.

### 13.5.3 Industrial – Future supply

- Our investigation on future industrial supply indicate that there are a number of areas that, subject to further investigation, may be suitable for rezoning to accommodate future employment growth.
- Approximately 155 hectares of future industrial land has been identified across five proposed precincts in Kempsey LGA.
- The anticipated delivery time-frame and size of these precincts is summarised below.

**Table 13.10**

**Future Industrial Precincts - Kempsey LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
North Frederickton Industrial Precinct	60.0	1 - 10
South Kempsey Industrial Precinct	45.0	1 - 10
Green Hill Industrial Precinct	39.0	1 - 10
South West Rocks Industrial	8.0	1 - 10
North Coast Railway Industrial Land	3.0	10 - 20
<b>Total</b>	<b>155.0</b>	

*Source: MacroPlan Dimasi*

*\*These precincts have been zoned for industrial uses*

- Encompassing 60 hectares, the **North Frederickton Industrial Precinct** constitutes the largest proportion of identified future industrial land within the LGA. Access to the precinct will likely be gained via Collombatti Frederic Rd (which is not currently suited to large trucks) and via Macleay Valley Way. The site is in close proximity to residential uses (i.e. suburb of Frederickton).
- South Kempsey has also been identified as a new industrial precinct, encompassing 45 hectares. The site will be accessible via the Pacific Highway.



#### 13.5.4 Retail & Commercial – Existing supply

In terms of population, Kempsey LGA is relatively small in comparison with some of the larger coastal LGAs, resulting in a much smaller provision of business zoned land and associated retail floorspace.

Kempsey LGA supports a resident population (2014) of approximately 29,450 persons, in addition to tourism visitation which equates to an equivalent year-round population of about 3,100 persons (equivalent to about 11% of the resident population).

The population level in the LGA is insufficient to support a comprehensive retail/commercial centres hierarchy. The Kempsey major town centre provides sub-regional facilities, and is supported by the town of South West Rocks, but other villages/centres are of a relatively small scale.

##### Existing retail/commercial hierarchy

The Kempsey LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 13.3 and Map 13.4.

- The Kempsey LGA centres hierarchy generally consists of the following structure – as defined by Council in its LGMS:
  - Kempsey Major Town Centre.
  - South West Rocks Town Centre.
  - Inland and coastal villages (such as Frederickton, Smithtown, Crescent Head and Willawarrin)

##### Kempsey Major Town Centre

- The town of Kempsey (including both the Town Centre and West Kempsey) is the major administrative, health, retail and commercial centre in the Kempsey LGA.
- The Kempsey Town Centre contains a range of retail facilities, including Kempsey Central, which is anchored by Target Country and Coles, a centre

comprising standalone Big W and Woolworths stores, a standalone IGA supermarket and a small, Aldi anchored convenience centre. Furthermore, the Town Centre provides a retail strip along Macleay Valley Way/Smith Street and Belgrave Street, which generally comprises convenience based retail facilities, services, boutique/independent retailers and a number of cafes/restaurants/bars and takeaway food outlets.

- The West Kempsey strip includes a range of tenancies and uses, including an IGA foodstore, convenience oriented retail, retail services, food catering and entertainment, as well as non-retail and personal services.

### **South West Rocks Town Centre**

The South West Rocks Town Centre is centred on Prince of Wales Avenue, between Gregory Street to the north and Memorial Avenue to the south. The town centre provides a range of strip retail, typical of a coastal town, primarily servicing the convenience needs of local residents. South West Rocks includes two main shopping centres, being the Coles anchored Colonial Fair, located approximately 2.6 km south of the town centre; and South West Rocks SC, located about 1.2 km south of the main town centre anchored by a small IGA supermarket.

### **Other centres/villages**

There are a number of small village centres distributed elsewhere across the LGA, which provide a limited mix of retail and non-retail floorspace, with only Crescent Head providing business zoned land, that being 1.1 ha of B2 zoned land that a small convenience offer, including a small Foodworks.

# Map 13.3

## Kempsey Shire Council

### Retail Provision

#### Legend \*

-  Kempsey Shire Council Boundary

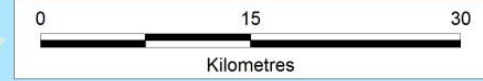
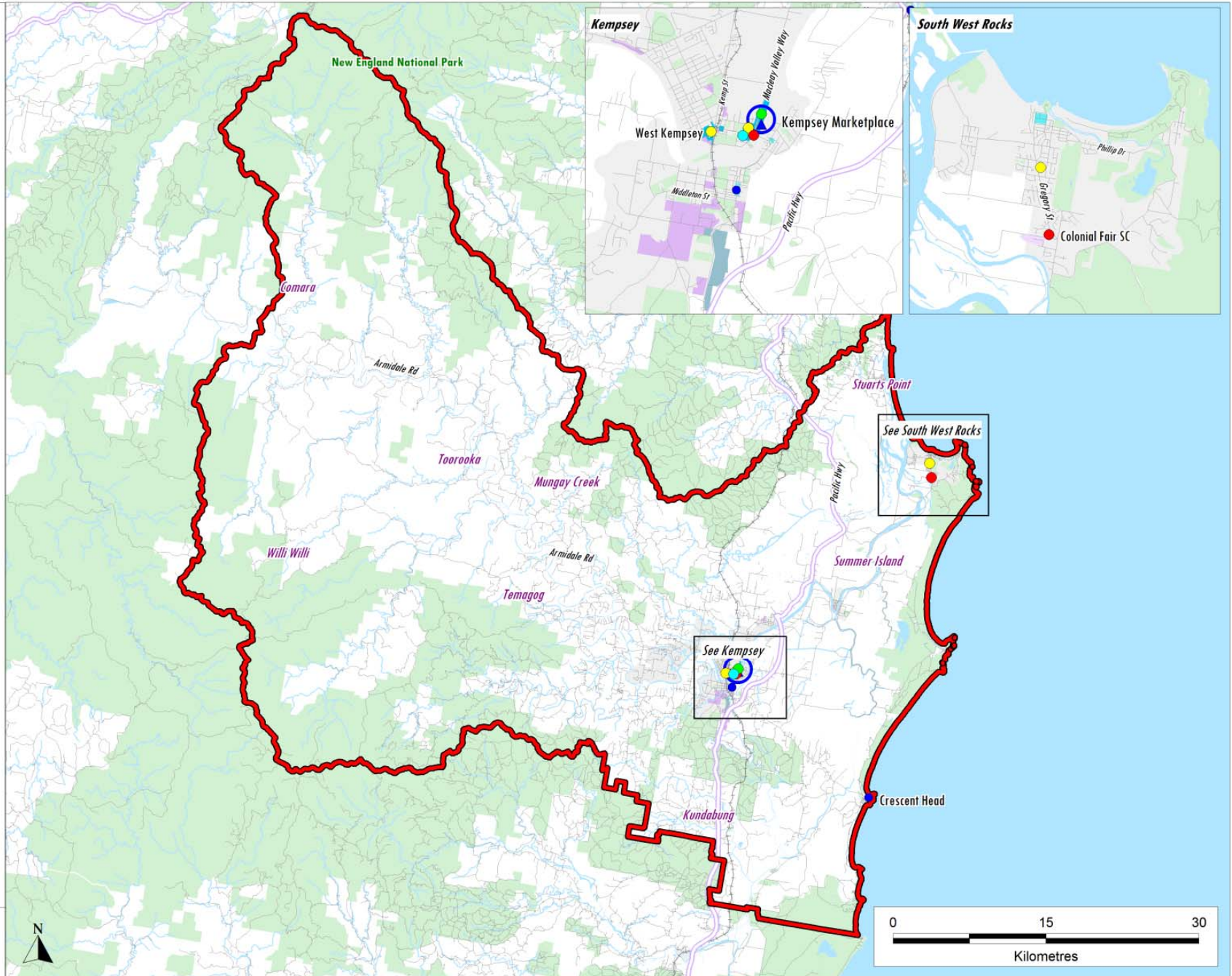
#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

#### Retail Competition

-  Sub-Regional Centre
-  Big W
-  Woolworths
-  Coles/Bi-Lo
-  Aldi
-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)
-  Potential Smkt

\* Hollow symbols indicate proposed stores





# Map 13.4

## Kempsey Shire Council

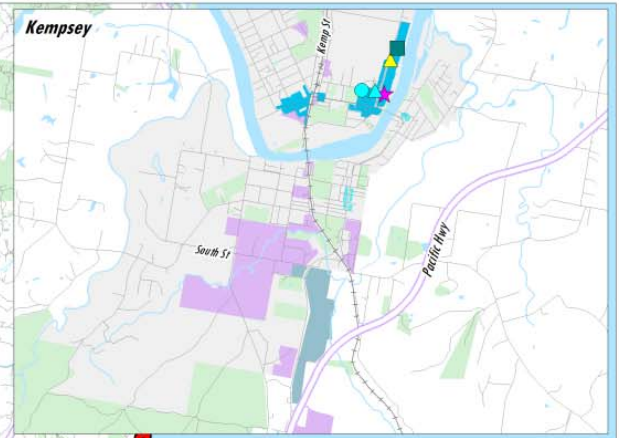
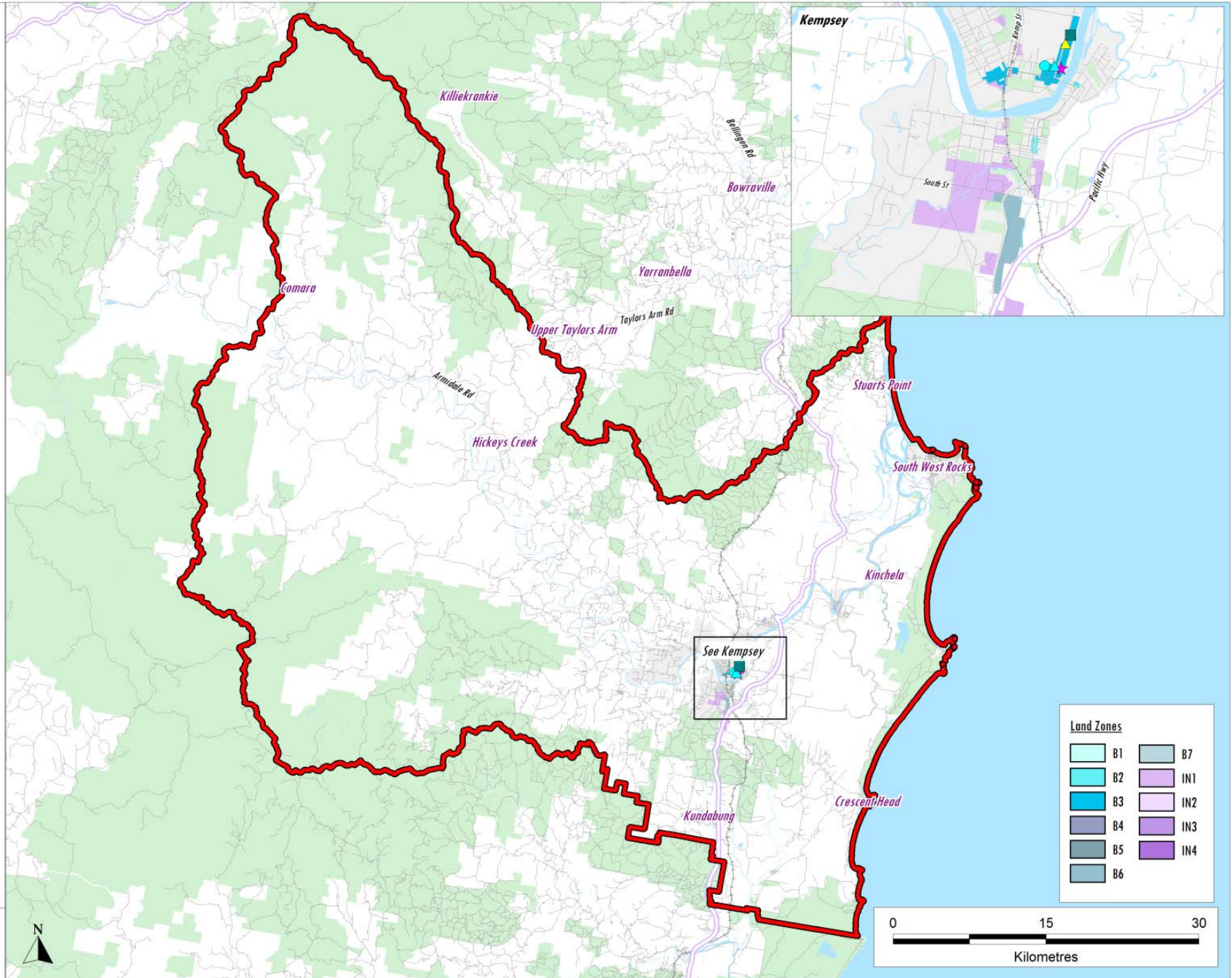
### Bulky/ Homemaker Goods Retailing

Legend\*












 Kempsey Shire Council Boundary

Bulky Goods Retailers

-  Bunnings Warehouse
-  Repco
-  Super Cheap Auto
-  Carpet Court
-  Betta Home Living



**Land Zones**

	B1		B7
	B2		IN1
	B3		IN2
	B4		IN3
	B5		IN4
	B6		



### **Business zoned land and capacity for retail and commercial floorspace**

Table 13.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **112.4 hectares of business zoned land** within the Kempsey LGA, of which 4.1 ha is B1 zoned land, 10.2 ha is B2 zoned land and 42.0 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is also 56.1 ha of B6 zoned land within the LGA.
- We have applied FSRs for each business zone type from the Kempsey LEP 2013 and for zones where FSRs are not applied, we have applied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Kempsey LGA to be in the order of 1,412,819 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 20%, given the relative size and mix of the retail offer compared with nearby Port Macquarie. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 13.11**  
Kempsey LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1	4.1	1.7	68,814
Total B2	10.2	2.3	231,439
Total B3	42.0	1.5	629,895
Total B6*	<u>56.1</u>	<u>0.9</u>	<u>482,672</u>
<b>Total LGA</b>	<b>112.4</b>		<b>1,412,819</b>

\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi

### 13.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within Kempsey LGA.

### 13.5.6 Special Uses – Existing supply

- According to the Kempsey LEP 2013 there are two land use zones within the 'special uses' category i.e. SP2 Infrastructure and SP3 Tourist.
- Cemeteries, classified roads, rail infrastructure, sewerage systems, water supply systems and other miscellaneous uses have been removed from our estimates of urban employment land for this category as they do not present a development opportunity.

**Table 13.12**  
Identified Special Use Sites - Kempsey LGA

Name	Total Area (hectares)
Slim Dusty Centre	13.5
<b>Total</b>	<b>13.5</b>

Source: MacroPlan Dimasi

- Within the Kempsey LGA, 13.5 hectares has been allocated to tourism activities (SP3), consisting wholly of the Slim Dusty Centre. We estimate that approximately 15% of this site has been developed, allowing for 10 hectares of land to be developed in the future (assuming there are no constraints).

**Figure 5. Slim Dusty Centre Regional Context**



*Source: SIX maps (NSW Department of Planning and Environment)*

### **13.5.7 Special Uses – Future supply**

There are currently no plans to increase or redevelop Special Use zoned land.

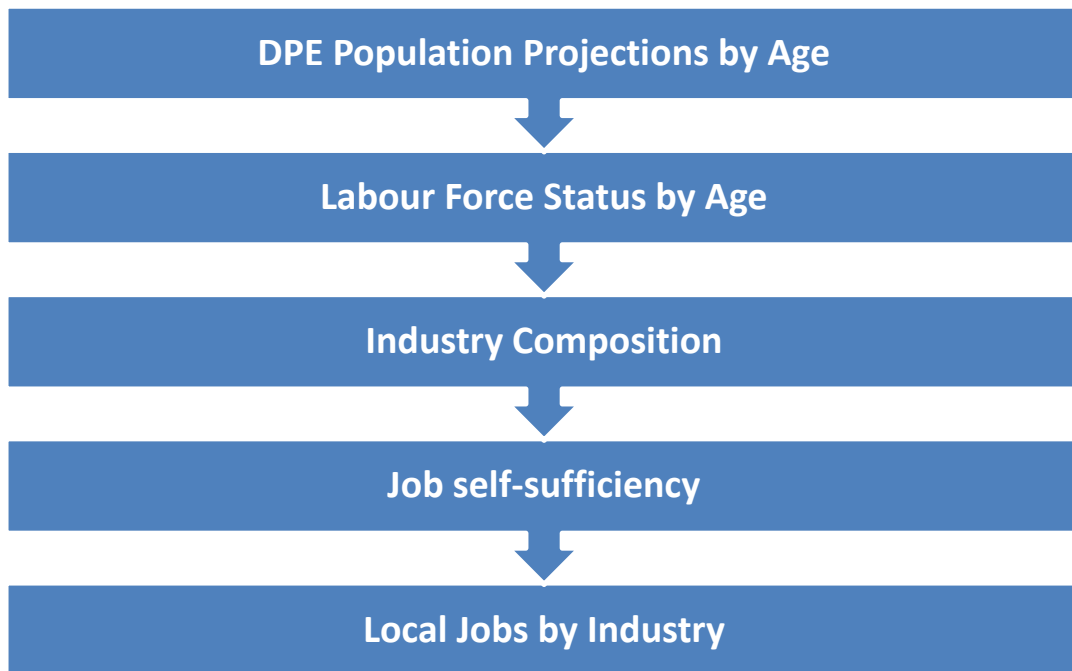
## 13.6 Demand for employment land

This section provides a coherent description of methodology applied to derive estimated demand for employment land across Kempsey LGA. It outlines data sources, assumptions and calculations deployed to provide a consistent, evidence-based projection of demand that can be applied to employment land across the Kempsey LGA.

### 13.6.1 Methodology

- In order to derive the quantum of commercial, industrial and special use land required in Kempsey LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Kempsey LGA to deliver employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Kempsey LGA.





- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types.
  2. Applying indicative employment densities.
- Finally, through observed or weighted average floorspace ratios (FSRs), we calculate the amount of land required for each land use type.
- An alternative methodology has been used to derive demand for retail floorspace.

### 13.6.2 Employment Projections

- Following jobs growth over the five years to 2011 (124 jobs per annum), employment growth in the Kempsey LGA is expected to continue over the forecast period – albeit, at a slower pace. Over the twenty years to 2031, it is expected the workforce will expand by an average of 35 jobs per annum.
- Over the ten years to 2021, our projections imply an employment gain of 332 jobs in Kempsey LGA. As at 2021, the LGA is projected to support 9,129 jobs.

- Additionally, by 2031, employment in the LGA is expected to increase further to 9,515, which represents 386 job additions since 2021.
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+194), Accommodation and Food Services (+138), Education and Training (+134) and Retail Trade (+126).
- Concurrently, outright job losses is predicted for four industries – Manufacturing (-153), Agriculture, Forestry and Fishing (-67), Arts and Recreational Services (-9) and Information Media and Telecommunications (-8).

**Table 13.13**  
Employment by Industry - Kempsey LGA (2011, 2021, 2031)

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	1,386	1,525	1,580	194
Accommodation and Food Services	814	892	952	138
Education and Training	877	951	1,011	134
Retail Trade	1,301	1,349	1,427	126
Construction	679	696	763	84
Professional, Scientific and Technical Services	283	320	349	66
Transport, Postal and Warehousing	359	393	409	50
Rental, Hiring and Real Estate Services	104	107	152	48
Wholesale Trade	230	243	266	36
Electricity, Gas, Water and Waste Services	83	96	114	31
Other Services	280	301	304	24
Public Administration and Safety	718	721	742	24
Financial and Insurance Services	129	146	152	23
Administrative and Support Services	236	246	256	20
Mining	21	22	32	11
Information Media and Telecommunications	51	41	43	-8
Arts and Recreation Services	89	95	80	-9
Other*	65	0	0	-65
Agriculture, Forestry and Fishing	435	399	368	-67
Manufacturing	667	584	514	-153
<b>Total</b>	<b>8,807</b>	<b>9,129</b>	<b>9,515</b>	<b>708</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 13.14**  
Industry and Land Use Conversion Matrix - Kempsey LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

**Table 13.15**  
Employment Additions by Land Use Type - Kempsey LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	1	2	12	16	0	0
Construction	2	7	15	60	0	0
Wholesale Trade	11	18	3	5	0	0
Retail Trade	45	75	2	4	0	0
Accommodation and Food Services	55	41	23	18	0	0
Transport, Postal and Warehousing	7	3	27	13	0	0
Information Media and Telecommunications	0	2	0	0	0	0
Financial and Insurance Services	17	6	0	0	0	0
Rental, Hiring and Real Estate Services	3	45	0	0	0	0
Professional, Scientific and Technical Services	37	29	0	0	0	0
Administrative and Support Services	10	10	0	0	0	0
Public Administration and Safety	3	21	0	0	0	0
Education and Training	7	6	0	0	67	53
Health Care and Social Assistance	28	11	0	0	111	43
Arts and Recreation Services	6	0	0	0	0	0
Other Services	21	3	0	0	0	0

Note: These figures may be subject to rounding

Source: MacroPlan Dimasi

### 13.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in Kempsey LGA (presented in Table 13.16).

**Table 13.16**

**Indicative Employment Density by Industry and Land Use Type - Kempsey LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 13.17**  
Additional Floorspace by Industry under the Base Scenario (sqm) - Kempsey LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	210	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	50	70	3,040	3,980	0	0
Construction	50	200	2,300	9,070	0	0
Wholesale Trade	320	550	530	910	0	0
Retail Trade	1,810	2,990	330	550	0	0
Accommodation and Food Services	2,740	2,050	3,520	2,640	0	0
Transport, Postal and Warehousing	200	100	5,390	2,630	0	0
Information Media and Telecommunications	0	50	0	0	0	0
Financial and Insurance Services	430	150	0	0	0	0
Rental, Hiring and Real Estate Services	80	1,130	0	0	0	0
Professional, Scientific and Technical Services	920	720	0	0	0	0
Administrative and Support Services	240	260	0	0	0	0
Public Administration and Safety	90	520	0	0	0	0
Education and Training	300	240	0	0	3,350	2,660
Health Care and Social Assistance	1,110	430	0	0	6,680	2,610
Arts and Recreation Services	250	0	0	0	0	0
Other Services	860	120	0	0	0	0
<b>Total</b>	<b>9,450</b>	<b>9,580</b>	<b>15,130</b>	<b>19,990</b>	<b>10,030</b>	<b>5,270</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated an additional **9,450 sq.m of commercial**, **15,130 sq.m of industrial** and **10,030 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for an additional **9,580 sq.m of commercial**, **19,990 sq.m of industrial** and **5,270 sq.m of special use** floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment i.e. a proportion of new jobs will be accommodated within existing premises.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 13.18.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of actions and decisions made by businesses.

**Table 13.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Kempsey LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	160	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	40	50	2,280	2,990	0	0
Construction	40	150	1,730	6,800	0	0
Wholesale Trade	240	410	400	680	0	0
Retail Trade	1,360	2,240	250	410	0	0
Accommodation and Food Services	2,050	1,540	2,640	1,980	0	0
Transport, Postal and Warehousing	150	70	4,050	1,970	0	0
Information Media and Telecommunications	0	40	0	0	0	0
Financial and Insurance Services	320	110	0	0	0	0
Rental, Hiring and Real Estate Services	60	850	0	0	0	0
Professional, Scientific and Technical Services	690	540	0	0	0	0
Administrative and Support Services	180	190	0	0	0	0
Public Administration and Safety	70	390	0	0	0	0
Education and Training	220	180	0	0	2,510	2,000
Health Care and Social Assistance	840	330	0	0	5,010	1,960
Arts and Recreation Services	190	0	0	0	0	0
Other Services	640	90	0	0	0	0
<b>Total</b>	<b>7,090</b>	<b>7,180</b>	<b>11,360</b>	<b>14,990</b>	<b>7,520</b>	<b>3,960</b>

Source: MacroPlan Dimasi

- The Alternative Scenario indicates an additional **7,090 sq.m of commercial**, **11,360 sq.m of industrial** and **7,520 sq.m of special use** floorspace demand will materialise by 2021
- Under this scenario, demand for commercial and industrial floorspace will rise, but contract for the special uses category. Over the ten years to 2031, an additional **7,180 sq.m of commercial**, **14,990 sq.m of industrial** and **3,960 sq.m of special uses** floorspace is expected to materialise.

### 13.6.4 Demand for Employment Land

- A FSR is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Kempsey LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B1 Neighbourhood Centre 1:1
  - B2 Local Centre 2:1
  - B3 Commercial Core 1:1
- As such, an observed average FSR of 1:1 has been applied across all business zones, 0.6:1 for industrial uses and 0.8:1 for Special Use land.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **1.4–1.9 hectares of commercial**, **4.4–5.9 hectares of industrial** and **1.4–1.9 hectares of special uses** land will be required by 2031.

**Table 13.19**

Demand for Employment Land (2031) - Kempsey LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	1.4 - 1.9	1.0	1.4 - 1.9
Industrial	2.6 - 3.5	0.6	4.4 - 5.9
Special Uses	1.1 - 1.5	0.8	1.4 - 1.9

Source: MacroPlan Dimasi

### 13.6.5 Demand for Retail Floorspace

The potential drivers of future demand for retail floorspace in Kempsey LGA are summarised below:

- Population growth – growing at an average of 0.2% per annum to 2031 (a net increase of 4.6% or 1,350 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 13.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Kempsey LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 13.20 shows the following:

- The residential population of the Kempsey LGA generates approximately **55,500 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **1.9 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **11,510 sq.m** by 2031, an increase of about **19%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **5,900 sq.m**, and is expected to increase by about **1100 sq.m** by 2031.



- Total retail demand growth equates to an equivalent land requirement of **2.3 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

	Forecast retail spend (\$M)					Avg. ann. growth 2014-31 (%)
	2014	2016	2021	2026	2031	
Population	29,450	29,650	30,100	30,350	30,500	0.2%
Tourism equiv. pop	3,134	3,156	3,203	3,230	3,246	0.2%
<b>Retail exp. (\$M)</b>						
Food & liquor	160	163	173	183	193	1.1%
Food catering	36	37	40	43	46	1.4%
Apparel	27	27	28	29	30	0.6%
Household	55	55	57	59	61	0.6%
Leisure	15	16	16	17	18	0.9%
General	27	28	30	32	34	1.3%
Retail services	<u>9</u>	<u>9</u>	<u>9</u>	<u>10</u>	<u>10</u>	<u>0.9%</u>
<b>Total</b>	<b>329</b>	<b>336</b>	<b>354</b>	<b>373</b>	<b>391</b>	<b>1.0%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	17,771	18,161	19,237	20,350	21,448	1.1%
Food catering	6,042	6,206	6,655	7,128	7,606	1.4%
Apparel	4,900	4,958	5,123	5,286	5,435	0.6%
Household	18,216	18,432	19,045	19,652	20,205	0.6%
Leisure	2,576	2,620	2,741	2,863	2,981	0.9%
General	4,573	4,687	5,002	5,331	5,660	1.3%
Retail services	<u>1,424</u>	<u>1,449</u>	<u>1,515</u>	<u>1,583</u>	<u>1,648</u>	<u>0.9%</u>
<b>Total</b>	<b>55,533</b>	<b>56,638</b>	<b>59,698</b>	<b>62,850</b>	<b>65,936</b>	<b>1.2%</b>
<b>Floorspace per capita</b>	<b>1.89</b>	<b>1.91</b>	<b>1.98</b>	<b>2.07</b>	<b>2.16</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	3,134	3,156	3,203	3,230	3,246	0.2%
Floorspace per capita	<u>1.89</u>	<u>1.91</u>	<u>1.98</u>	<u>2.07</u>	<u>2.16</u>	<u>0.8%</u>
<b>Tourism floorspace (sq.m)</b>	<b>5,910</b>	<b>6,028</b>	<b>6,353</b>	<b>6,689</b>	<b>7,017</b>	<b>1.0%</b>
<b>Total retail demand (sq.m)</b>	<b>61,443</b>	<b>62,665</b>	<b>66,052</b>	<b>69,539</b>	<b>72,953</b>	<b>1.0%</b>
<b>Demand growth (14-31)</b>					<b>11,510</b>	
<b>Estimated land take (ha)</b>					<b>2.3</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 13.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Kempsey LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Kempsey LGA.

Key findings pertaining to the gap assessment are presented in Table 13.21.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	112.4	64.6	0.0	64.6	4.0	60.6
Industrial	272.4	48.0	155.0	203.0	5.1	197.9
Special Uses	16.5	12.4	0.0	12.4	1.7	10.7

Source: MacroPlan Dimasi

- Overall, there is sufficient zoned employment land to accommodate the future employment needs of the Kempsey LGA (out to 2031).
- Over the forecast period, it is estimated:
  - *Supply of business land will exceed demand by 60.6 hectares*
  - *Supply of industrial land will exceed demand by 197.9 hectares*
  - *Supply of special uses land will exceed demand by 10.7 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kempsey LGA. Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Kempsey LGA, particularly for new and emerging industries.

## 13.7 Conclusions

### 13.8.1 Commercial, Industrial and Special Uses

Between 2006 and 2011, the resident population of Kempsey LGA increased by 1,096 persons. The majority of this growth was in persons aged 50-64 and 65+ (increasing by 734 and 820 respectively). With the exception of 20-34 residents, all other age groups registered a contraction in its headcount.

Over the five years to 2011, net migration to Kempsey LGA totalled 406 persons. People moving from Sydney and overseas contributed to this net gain. By age, older residents also dominated, reinforcing Kempsey's popularity as a destination for retirees.

Similar to other LGAs in the North Coast, there is a need to stem the outflow of young workers leaving Kempsey LGA. Seeking more employment opportunities, these younger adults have migrated to other major regional centres and Sydney. This can be addressed through industry diversification and greater emphasis behind education and training.

As at 2011, Kempsey LGA supported 8,807 jobs, accounting for 5% of the North Coast workforce.

The top five employing industries are service or population orientated, including Health Care and Social Assistance (15.7%), Retail Trade (14.8%), Education and Training (10.0%), Accommodation and Food Services (9.2%) and Public Administration and Safety (8.2%). Collectively, these industries engage around 58% of the local workforce.

Notably, employment in Manufacturing and Construction exceeded 1,300 as at 2011.

Over the five year period to 2011, 619 new jobs were created in Kempsey LGA. Absorbed in the Health Care and Social Assistance (+322 jobs), Construction (+139 jobs), Public Administration and Safety (+66 jobs) and Education and

Training (+60 jobs) industries, these gains were partially offset by job losses in Agriculture, Forestry and Fishing and Manufacturing.

Key economic and demographic drivers and associated outcomes for Kempsey LGA include:

- DPE projections suggest population growth will recede from current levels, from 0.8% to 0.2% per annum out to 2031.
- Ageing to play an important role in encouraging more investment into health capacity and services.
- The manifestation of further job losses in traditional industries (e.g. manufacturing and agriculture).
- Six industries to register 100+ additional jobs:
  - Health Care and Social Assistance.
  - Retail Trade, Accommodation and Food Services.
  - Education and Training.
  - Transport, Postal and Warehousing.
  - Construction.

A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) premises.

As such, our estimates of demand indicate **14,270–19,030 sq.m of commercial, 11,510 sq.m of retail, 26,350–35,120 sq.m of industrial and 11,480–15,300 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates an additional **1.4–1.9 hectares of commercial, 2.3 hectares of retail, 4.4–5.9 hectares of industrial and 1.4–1.9 hectares of special uses** land will be required by 2031.

Overall, there is sufficient land available to accommodate future employment needs over the forecast period. Over the forecast period, it is estimated:

- *Supply of business land will exceed demand by 60.6 hectares*
- *Supply of industrial land will exceed demand by 197.9 hectares*
- *Supply of special uses land will exceed demand by 10.7 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Kempsey LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Kempsey LGA, particularly for new and emerging industries.

### **13.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Kempsey LGA:

- Future population growth is expected to average about 0.2% per annum over the period to 2031, resulting in a total increase of about 4.6% on current levels, or an additional 1,350 persons.
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 11,510 m (an 18.7% uplift) by 2031, equating to a land requirement of about 2.3 hectares.
- Existing retail demand is estimated at 61,443 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 1,412,819 sq.m. However because the retail offer in Port Macquarie is more comprehensive, we estimate leakage of about 20% beyond the LGA to centres such as Port Macquarie and to an extent, Coffs Harbour, resulting in net demand of about 49,200 sq.m, increasing to 58,300 sq.m by 2031.

- The existing population in Kempsey is only just sufficient to support one sub-regional retail facility, and by 2031, the population will still be of a scale too small to be realistically considered for any major additional facilities. This is not to say that new retail formats/concepts may not seek to enter the Kempsey market in the future, and the planning system should be flexible enough to allow such uses to be considered in the context of their net community benefits.
- Kempsey does not have any specific retail/commercial strategies guiding future development, but generally, the LEP 2013 outlines a zoning scheme that supports development in the Kempsey Town Centre and South West Rocks.
- Because of the low growth outlook expected across the LGA, our preliminary analysis tends to indicate that the existing land stock should be broadly **sufficient to support the future retail demand growth across the LGA.**
- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 14: LGA Analysis–Port Macquarie-Hastings

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Port Macquarie LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Port Macquarie LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Port Macquarie LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as considered feedback from the DP&E and Port Macquarie-Hastings Council.

### 14.1 Key facts, findings and take-outs

#### 14.1.1 Population growth

- Over the five years to 2011, the resident population of Port Macquarie-Hastings LGA increased by 5,285 persons – at an average rate of 1.5% per annum.

- In line with the broader North Coast region, population growth was most pronounced within the 50-64 and 65+ age cohorts – equating to 1,671 and 2,770 persons respectively.
- Between 2006 and 2011, net migration to Port Macquarie-Hastings LGA exceeded 5,000 persons, mainly from Sydney and regional NSW.
- DPE projections suggest population growth will ease from current levels, to 0.9% per annum.

#### 14.1.2 Employment trends

- As at 2011, the Port Macquarie-Hastings LGA supported 23,322 jobs, accounting for 13% of the North Coast workforce.
- The employment profile of the Port Macquarie-Hastings LGA is consistent with the broader North Coast region, with the Health Care and Social Assistance industry engaging 17.4% of the region's workforce. Additionally, Health Care and Social Assistance comprised the largest share of job additions amongst industries that service local residents (+856 jobs) as well as Electricity, Gas, Water & Waste Services (+291 jobs).
- Over the five years to 2011, 820 new jobs were created in the Port Macquarie-Hastings LGA.

#### 14.1.3 Employment land

- In Port Macquarie-Hastings LGA, there are 949 hectares of land zoned for urban employment purposes – comprising of 23% Business, 47% Industrial and 30% Special Uses.
- Following solid growth during the 2006 and 2011 period (+164 jobs per annum), employment growth in the Port Macquarie-Hastings LGA is expected to continue over the forecast period (+164 jobs per annum).
- A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) in the Port Macquarie-Hastings LGA.



- As such, our estimates of demand indicate **54,800–73,100 sq.m of commercial, 58,867 sq.m of retail, 117,710–156,950 sq.m of industrial** and **52,650–70,200 sq.m of special use** gross floor area will be required by 2031.
- Based on derived requirements and average floorspace ratios, MacroPlan Dimasi estimates around an additional **3.6–4.9 hectares of commercial, 11.8 hectares of retail, 19.6–26.1 hectares of industrial** and **6.6–8.8 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land in Port Macquarie-Hastings LGA to accommodate future employment needs out to 2031. It is estimated over the forecast period:
  - *Supply of business land will exceed demand by 53.9 hectares*
  - *Supply of industrial land will exceed demand by 325.7 hectares*
  - *Supply of special uses land will exceed demand by 78.3 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Port Macquarie-Hastings LGA.
- Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in the Port Macquarie-Hastings LGA i.e. compared to that suggested in this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'employment' land in the Port Macquarie-Hastings LGA.

## 14.2 Literature review

The key documents of relevance for the Port Macquarie-Hastings LGA are the Urban Growth Management Strategy (2011 – 2031), which was informed by many other studies, includes a detailed section on the Retail Strategy and Retail Policy for Port Macquarie-Hastings.

The following points are of relevance to employment lands:

- The previous MNCRS recognises the importance of Port Macquarie as a Major Regional Centre. These centres are expected to accommodate the majority of future commercial development in their respective sub-regions.
- The retail hierarchy in the Port Macquarie Hastings LGA has been long established, and has generally been maintained through several successive planning instruments. The Greater Port Macquarie CBD (including the Settlement City precinct) heads Council's retail hierarchy.
- The Retail Strategy and Retail Policy section of the UGMS is based upon the MNCRS, the Settlement Planning Guidelines and a 2010 review of Council's 2004 Retail Policy (prepared by Hill PDA). The key principles from the UGMS included:
  1. Encourage a hierarchy of viable centres, consistent with the scale with the size of the towns and villages across the LGA.
  2. Protect and enhance existing centres, and provide better integration with transport.
  3. Restrict 'out-of-centre' retailing unless there are compelling reasons to support such development.
  4. Encourage bulky goods style retailing in/near commercial centres and restrict such development from industrial zones.
- The key principles from the Hill PDA document were as follows:

- In 2010, there was an estimated 115,150 sq.m of retail floorspace across the LGA and an estimated 21,200 sq.m of non-retail shopfront floorspace. The majority of this space was provided in the 'Greater CBD' (75,150 sq.m retail and 13,050 sq.m non-retail).
- Port Macquarie, with a relatively comprehensive retail offer, would attract retail expenditure from surrounding LGAs, as well as tourism expenditure.
- Retail floorspace demand within commercial centres was estimated to grow from 125,000 sq.m in 2007 to 210,000 sq.m by 2031, an increase of 85,000 sq.m over this timeframe.
- As at 2010, when the Hill PDA study was written, there was a considerable number of retail proposals in the pipeline that were expected to add an additional 45,000 sq.m of floorspace. Even with this additional supply, Hill PDA recommended a further 40,000 sq.m would be required by 2031.
- Hill PDA encouraged future development within the Port Macquarie CBD to 'maintain its dominance' in the retail hierarchy.
- The document outlined a 'Centres Hierarchy in 2021' and indicative size (GLA) for the various centres by this time.
- The key principles from the Hill PDA document then informed the Port-Macquarie Hastings Retail Policy Plan (RPP) which included the following specific objectives:
  - To maintain and enhance the present hierarchy of retail centres and to protect the integrity and viability of the Port Macquarie Town Centre.
  - To encourage new retail development within identified commercial business districts (e.g. Greater Port Macquarie CBD, Laurieton and Wauchope).
  - New retail centres to be restricted to Area 13 (Thrumster) and Area 14 (Bonny Hills) with no development of any new commercial centres.
  - Restrict bulky goods retailing outside the defined 'centres' to Lake Road, Hastings River Drive, Oxley Highway and Area 13.

- Restrict retail development in industrial zones.
- Additional department store/discount department store facilities to locate in the Greater Port Macquarie CBD.
- The UGMS identified potential precincts for investigation including; Tertiary education precinct (expansion in Port Macquarie around the North Coast Institute of TAFE , Newcastle University and Westport Technology High), Medical service precinct (to cluster around the Port Macquarie Base Hospital), integrated transport precinct (cluster on land north of Sancrox Road), Airport precinct (east of the airport for service industry or a business park), Marine industry precinct (adjacent to Birdons slipway incorporating the existing commercial wharf), and an Entertainment precinct (within the town centre integrating with the Glasshouse).
- The UGMS found Port Macquarie requires an additional 92-121ha of industrial land to 2031, as there was at least 12 years of industrial land supply in existing that will cater to growth up to 2025.
- The Port Macquarie Airport and Pacific Highway upgrade are noted as major infrastructure projects in the UGMS. The NSW budget also flagged the Port Macquarie Base Hospital expansion, new public schools and new fire and rescue station as key projects.
- The Economic Development Strategy identifies that the area is bisected by the Pacific Highway and the North Coast Rail line.
- Port Macquarie is the focal point of the region as a tourist destination and regional centre, as outlined by the EDS. Furthermore this strategy aims growth towards tourist and business sectors.

## **14.3 Socio-demographic trends**

### **14.3.1 Population change**

- According to ABS ERP figures, the Port Macquarie-Hastings LGA population grew by 5,285 persons over the five years to 2011 – resulting in a total population of 75,232 persons.

Year	Estimated Resident Population	Total Change (persons)
2001	64,960	
2006	69,947	4,987
2011	75,232	5,285

Source: ABS

- All age cohorts except persons aged 35-49 experienced solid gains.
- In line with the broader North Coast region, population growth was most pronounced within the 50-64 and 65+ age cohorts – equating to 1,671 and 2,770 persons respectively.

Age cohort	2006	2011	Change (2006-2011)	Composition -2011
0-19	17,314	17,844	530	24%
20-34	8,828	9,318	490	12%
35-49	13,899	13,723	-176	18%
50-64	14,245	15,916	1,671	21%
65+	15,661	18,431	2,770	24%
<b>Total</b>	<b>69,947</b>	<b>75,232</b>	<b>5,285</b>	<b>100%</b>

### 14.3.2 Migration movements

Inward and outward movements for the Port Macquarie-Hastings LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).

- Over the five years to 2011, total net migration into Port Macquarie-Hastings LGA totalled 5,035 persons.
- Movement from people previously living in Sydney provided the main source of net migration, while regional NSW (predominantly Newcastle) provided a considerable proportion of this net gain.
- The 35-49 age cohort represented the largest share of net migration with 1,741 persons – this reflects the attraction associated with a larger and more diverse employment base.

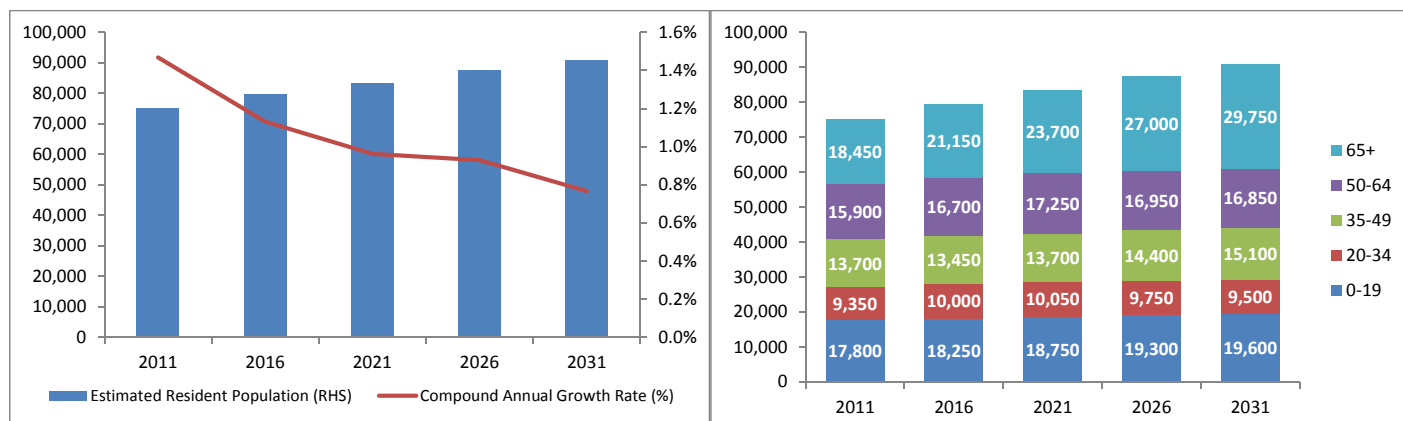
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	71	81	39	46	107	344
Sydney	390	37	656	732	462	2,277
Regional NSW	368	-243	456	294	257	1,132
Interstate	14	-485	277	249	234	289
Overseas	197	278	313	142	63	993
<b>Total Net Migration</b>	<b>1,040</b>	<b>-332</b>	<b>1,741</b>	<b>1,463</b>	<b>1,123</b>	<b>5,035</b>

Source: ABS

### 14.3.3 Population projections

- According to the 2014 DP&E projections, the Port Macquarie-Hastings LGA population is projected to expand to 90,800 by 2031.
- It is anticipated the population growth will average 779 per annum over the 2011 to 2031 period.

**Figure 1. Projected Population (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- Over the forecast period, population growth is projected to be highest amongst persons aged 65+. Between 2011 and 2031, this cohort is projected to expand by 11,300 persons.
- The growth of persons aged 65+ will be driven by net in-migration and ageing within the existing resident population.
- Growth in all other age cohorts is expected to be positive, albeit substantially below that anticipated for the 65+ cohort.
- As at 2011, persons aged 65+ accounted for 25% of the Port Macquarie-Hastings population. However by 2031, it is expected to increase to account for 33%.

#### 14.3.4 Labour force status

- Of all residents in the Port Macquarie-Hastings LGA, approximately 82% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 52% i.e. 29,672 of 56,818 residents<sup>13</sup>.
- Of residents in labour force, 93% were employed and 7% unemployed (and seeking working) as at Census night.
- The Port Macquarie-Hastings' employment rate is higher than that observed for the North Coast (92%).

**Table 14.4**

**Labour Force Status by Age (number) - Port Macquarie-Hastings LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	1,881	339	2,220	2,014	4,234
20 - 29	3,709	460	4,169	1,101	5,270
30 - 39	5,089	313	5,402	1,295	6,697
40 - 49	7,171	393	7,564	1,520	9,084
50 - 59	6,729	373	7,102	2,665	9,767
60 - 69	2,681	159	2,840	7,275	10,115
70 - 79	302	6	308	6,813	7,121
80 - 84	50	0	50	2,395	2,445
85+	17	0	17	2,068	2,085
<b>Total</b>	<b>27,629</b>	<b>2,043</b>	<b>29,672</b>	<b>27,146</b>	<b>56,818</b>

*Source: Census of Population and Housing (2011)*

#### 14.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Port Macquarie-Hastings LGA.
- Around 80.9% of employed residents also work in the LGA.

<sup>13</sup> Based on Census of Population and Housing 2011



- The remaining 19.1% of working residents travel either to other North Coast LGAs (3.8%) or locations outside the North Coast (15.3%) for work.
- Of working residents who travel to other North Coast LGAs, popular workplace destinations include Kempsey (2.4%) and Greater Taree (0.9%).

Table 14.5

## Job Containment - Port Macquarie-Hastings LGA

	Value
Working residents	27,342
<u>Place of Work (number)</u>	
Port Macquarie-Hastings	22,129
North Coast LGAs (ex. Port Macquarie)	1,035
Outside North Coast	4,178
<b>Total</b>	<b>27,342</b>
<u>Job Containment (%)</u>	
Port Macquarie-Hastings	80.9%
North Coast LGAs	3.8%
Other	15.3%
<b>Total</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

- The next table presents job containment by industry for the LGA.
- Relative to the all industries average, eleven industries achieved high job containment (greater than 80.9%).
- Of all industries, Financial and Insurance Services (92.3%) and Electricity, Gas, Water and Waste Services (92.0%) achieved the highest rate of job containment in 2011.
- With the exception of Agriculture, Forestry and Fishing, there is an overt relationship between job containment and service denominated industries.

**Table 14.6**  
Job Containment by Industry - Port Macquarie-Hastings LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Financial and Insurance Services	92.3%	1.6%	6.2%	100.0%
Electricity, Gas, Water and Waste Services	92.0%	1.0%	7.0%	100.0%
Rental, Hiring and Real Estate Services	89.8%	1.3%	8.9%	100.0%
Professional, Scientific and Technical Services	87.6%	2.6%	9.7%	100.0%
Health Care and Social Assistance	87.6%	3.5%	8.9%	100.0%
Retail Trade	87.3%	2.6%	10.1%	100.0%
Accommodation and Food Services	87.3%	1.1%	11.7%	100.0%
Other Services	86.9%	1.4%	11.8%	100.0%
Information Media and Telecommunications	84.8%	1.8%	13.4%	100.0%
Education and Training	83.4%	6.7%	9.9%	100.0%
Agriculture, Forestry and Fishing	82.6%	3.6%	13.8%	100.0%
<b>Across all industries</b>	<b>80.9%</b>	<b>3.8%</b>	<b>15.3%</b>	<b>100.0%</b>
Manufacturing	80.6%	5.1%	14.3%	100.0%
Wholesale Trade	80.5%	2.8%	16.7%	100.0%
Arts and Recreation Services	78.7%	1.7%	19.5%	100.0%
Public Administration and Safety	75.9%	12.2%	11.9%	100.0%
Transport, Postal and Warehousing	73.5%	3.5%	23.0%	100.0%
Administrative and Support Services	69.7%	2.3%	28.0%	100.0%
Construction	49.4%	5.8%	44.8%	100.0%
Mining	36.3%	9.7%	54.0%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 14.4 Employment and labour market trends

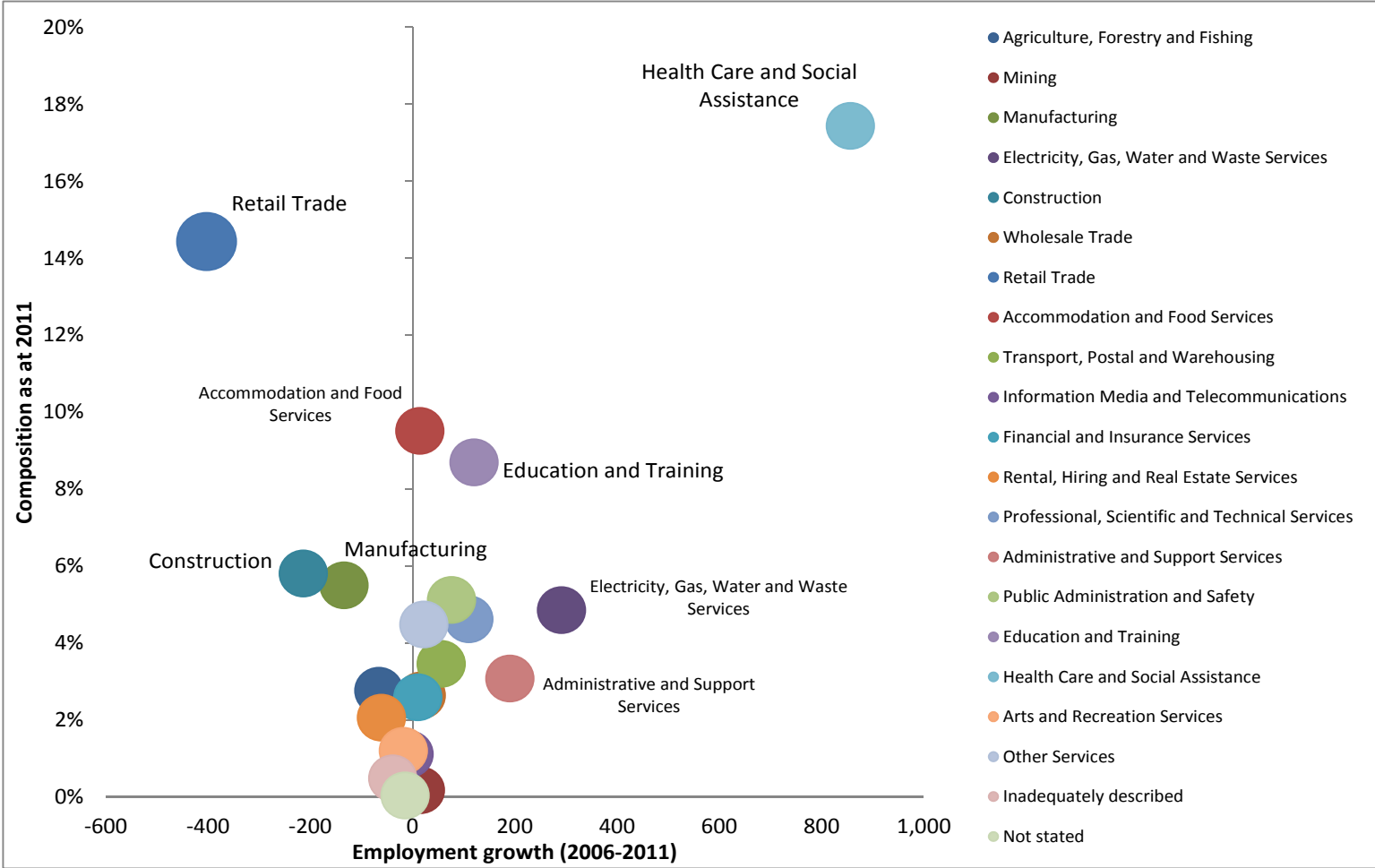
### 14.4.1 Industry composition

- The purpose of the current analysis is to generate an employment profile for the Port Macquarie-Hastings LGA and identify the key emerging trends and drivers that have 'shaped' its workforce over the last five years.
- Our analysis of employment trends is based on jobs within the LGA rather than on working residents living within the LGA. This is because demand for employment land is supported by jobs and not residents.
- As at 2011, the Port Macquarie-Hastings LGA supported 23,322 jobs, accounting for around 13% of total jobs in the North Coast (NC) region.
- Health Care and Social Assistance represented the largest employing industry in the LGA engaging 17.4% of the LGA's workforce in 2011. Retail Trade (14.4%), Accommodation and Food Services (9.5%), Education and Training

(8.7%) and Construction (5.8%) were the next four largest employing industries.

- The dominance of Health Care and Social Assistance is justified as the health system within the Port Macquarie-Hastings LGA supports the broader Mid North Coast region.
- Given that Port Macquarie is a regional centre, there is a higher provision of persons employed in white collar industries (21.9% compared to 20.6% for the NC region).
- At the same time, there is a lower proportion of workers engaged in primary industries and traditional value-add industries such as Construction, Manufacturing and Agriculture, Forestry and Fishing – 14.1% (Port Macquarie-Hastings LGA) vs. 17.8% (NC region).
- Over the five years to 2011, employment growth totalled 820 across the Port Macquarie-Hastings LGA.
- Consistent with other LGAs in the NC, the majority of job additions occurred in industries that service local residents - Health care & social assistance (+856 jobs) and Electricity, gas, water & waste services (+291 jobs).
- At the same time, nine industries experienced a decline in employment. The largest contraction occurred within the Retail Trade industry (-403 jobs), despite it being the second largest employer.

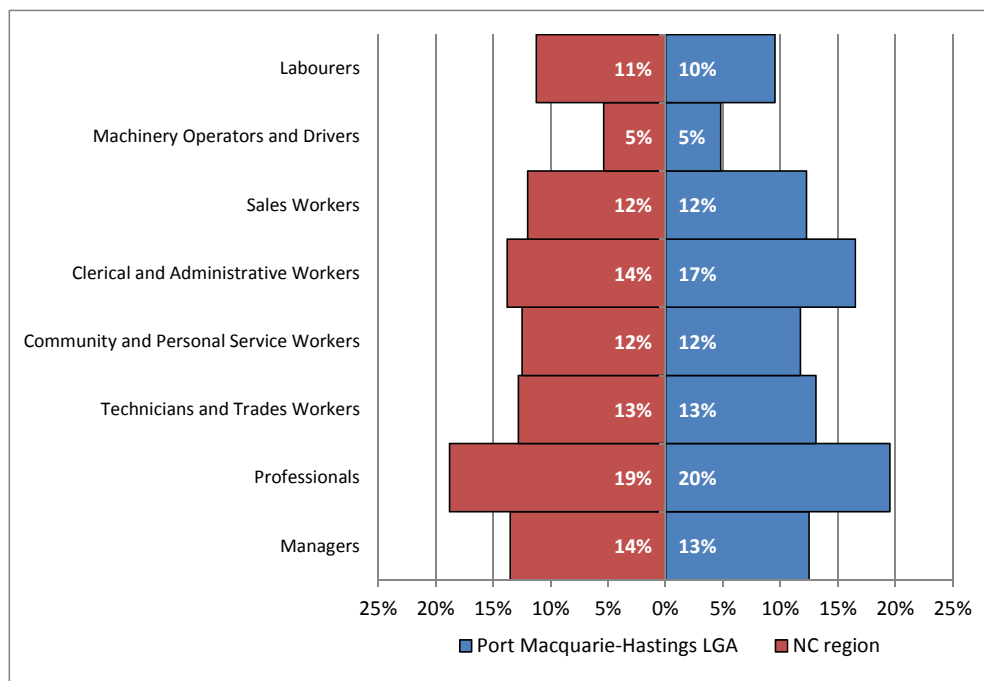
Figure 2. Employment composition and growth by industry, Port Macquarie-Hastings LGA



### 14.4.2 Occupation profile

- As at Census 2011 the dominant occupation category for workers in the Port Macquarie-Hastings LGA was 'Professionals', accounting for around 20% of the LGA's workforce, followed by 'Clerical and Administrative Workers' (17%).
- In comparison to the broader North Coast region, the Port Macquarie-Hastings LGA profile exhibits a skew to white collar occupations.
- There are fewer workers employed as 'Labourers' and 'Managers' within the Port Macquarie-Hastings LGA.

**Figure 3. Occupation Composition (2011)**



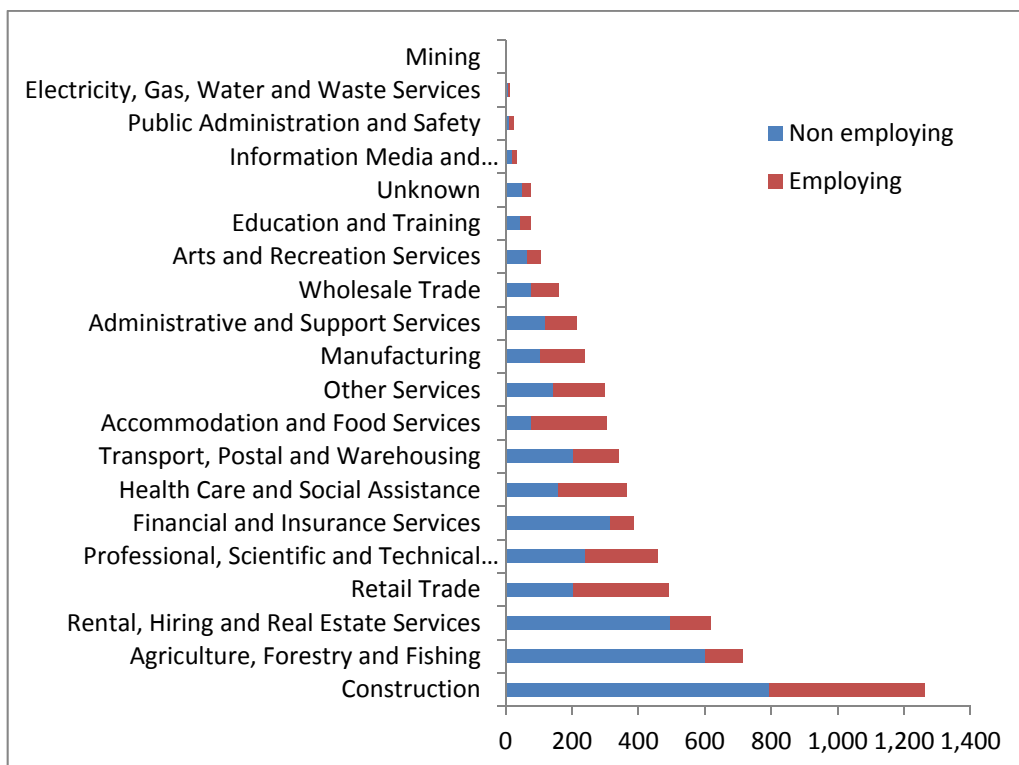
Source: ABS, MacroPlan Dimasi

### 14.4.3 Business composition & change

- As at June 2011, there were 6,172 businesses operating within the Port Macquarie-Hastings LGA, with 60% being non employing/sole trading businesses.

- The Construction industry accounted for 20% of businesses, while Agriculture, Forestry and Fishing entailed 11% of total businesses in the Port Macquarie-Hastings LGA.
- Of businesses that employ, representation was highest in the Construction (467) and Retail Trade (288) industries.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses in the Port Macquarie-Hastings LGA contracted by eight, mostly in the employing cohort (-16)
- By industry, business growth was most pronounced within Transport, Postal and Warehousing (+30), Financial and Insurance Services (+30) and Health Care and Social Assistance (+28).
- These increases were offset by business exits in the Agriculture, Forestry and Fishing (-47) and Construction (-45) industries.

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	-2	30	28
Retail Trade	-6	-26	-32
Accommodation and Food Services	8	12	20
Education and Training	-2	-2	-4
Construction	-19	-26	-45
Public Administration and Safety	-7	0	-7
Manufacturing	-17	-11	-28
Professional, Scientific and Technical Services	3	12	15
Other Services	2	5	7
Transport, Postal and Warehousing	12	18	30
Agriculture, Forestry and Fishing	-46	-1	-47
Administrative and Support Services	11	2	13
Wholesale Trade	9	-9	0
Rental, Hiring and Real Estate Services	1	5	6
Financial and Insurance Services	51	-21	30
Arts and Recreation Services	10	-21	-11
Electricity, Gas, Water and Waste Services	9	0	9
Information Media and Telecommunications	-3	-3	-6
Mining	0	-3	-3
Not Classified	-6	23	17
<b>Total</b>	<b>8</b>	<b>-16</b>	<b>-8</b>

Source: ABS

#### 14.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Employment within Port Macquarie – Hastings has a heavily reliance on the tourism sector, evident by the high representation within accommodation, food and beverage, and retail services sectors.
- The LGA is not only a popular tourist destination but also a location that attracts many retirees, including persons living in Sydney seeking a coastal lifestyle. This popularity is likely to place considerable strain on local health services, accentuating the need to support additional provisions.

## 14.5 Employment Land Supply

### 14.5.1 Zoned Urban Employment Land

- Based on zoning layers issued by the Department of Planning and Environment (July 2014) and the Port-Macquarie Local Environmental Plan 2011, MacroPlan Dimasi has obtained the amount of zoned employment land in the LGA.
- Broadly, there are three employment land use categories in this LGA, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each type.

Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	8.9	1%
	B2. Local Centre	45.2	5%
	B3. Commercial Core	42.4	4%
	B4. Mixed Use	35.7	4%
	B5. Business Development	62.3	7%
	B7. Business Park	25.6	3%
	<b>Total</b>	<b>220.0</b>	<b>23%</b>
Industrial	IN1. General Industrial	276.1	29%
	IN2. Light Industrial	84.6	9%
	IN3. Heavy Industrial	80.8	9%
	IN4. Working waterfront	3.1	0%
	<b>Total</b>	<b>444.6</b>	<b>47%</b>
Special Uses	SP2. Infrastructure	225.2	24%
	SP3. Tourist	59.5	6%
	<b>Total</b>	<b>284.7</b>	<b>30%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>949.2</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*



- In the Port Macquarie-Hastings LGA, there is 949.2 hectares of zoned urban employment land.
- Approximately 47% of zoned land is assigned for industrial uses, 30% for Special Uses and 23% for Business.
- Across the six business zones (B1, B2, B3, B4, B5 and B7), there is a total 62.3 hectares of land zoned as B5 Business Development, 45.2 hectares to B2 Local Centre, 42.4 hectares to B3 Commercial Core, 35.7 to B4 Mixed Use, 25.6 hectares to B7 Business Park and 8.9 hectares to B1 Neighbourhood Centre.
- There is 284.7 hectares of zoned urban land assigned across two SP2 zones.













# Map 14.1

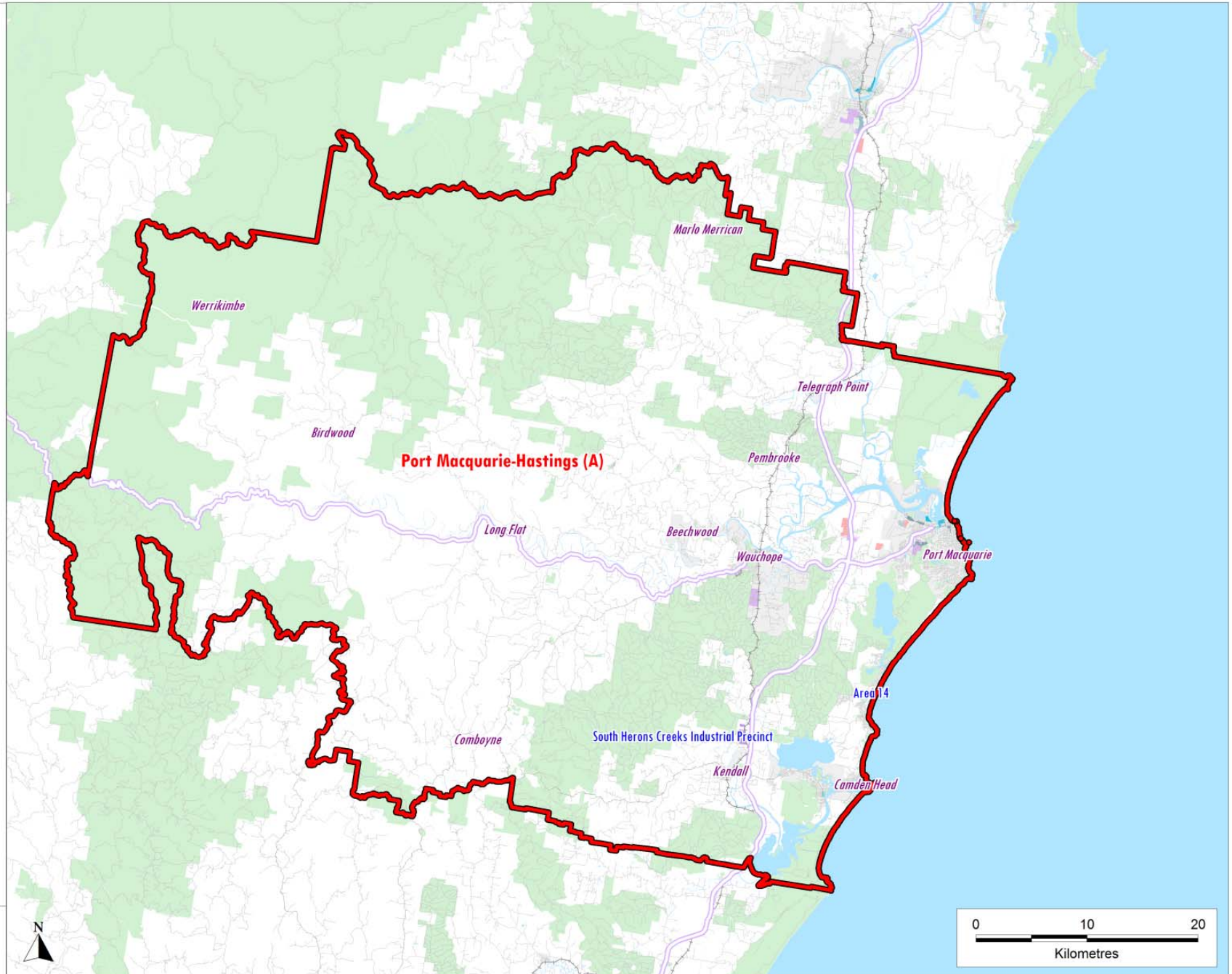
## Port Macquarie-Hastings Council Employment Land Zones

### Legend \*

 Port Macquarie-Hastings Council Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts



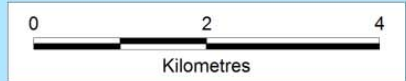
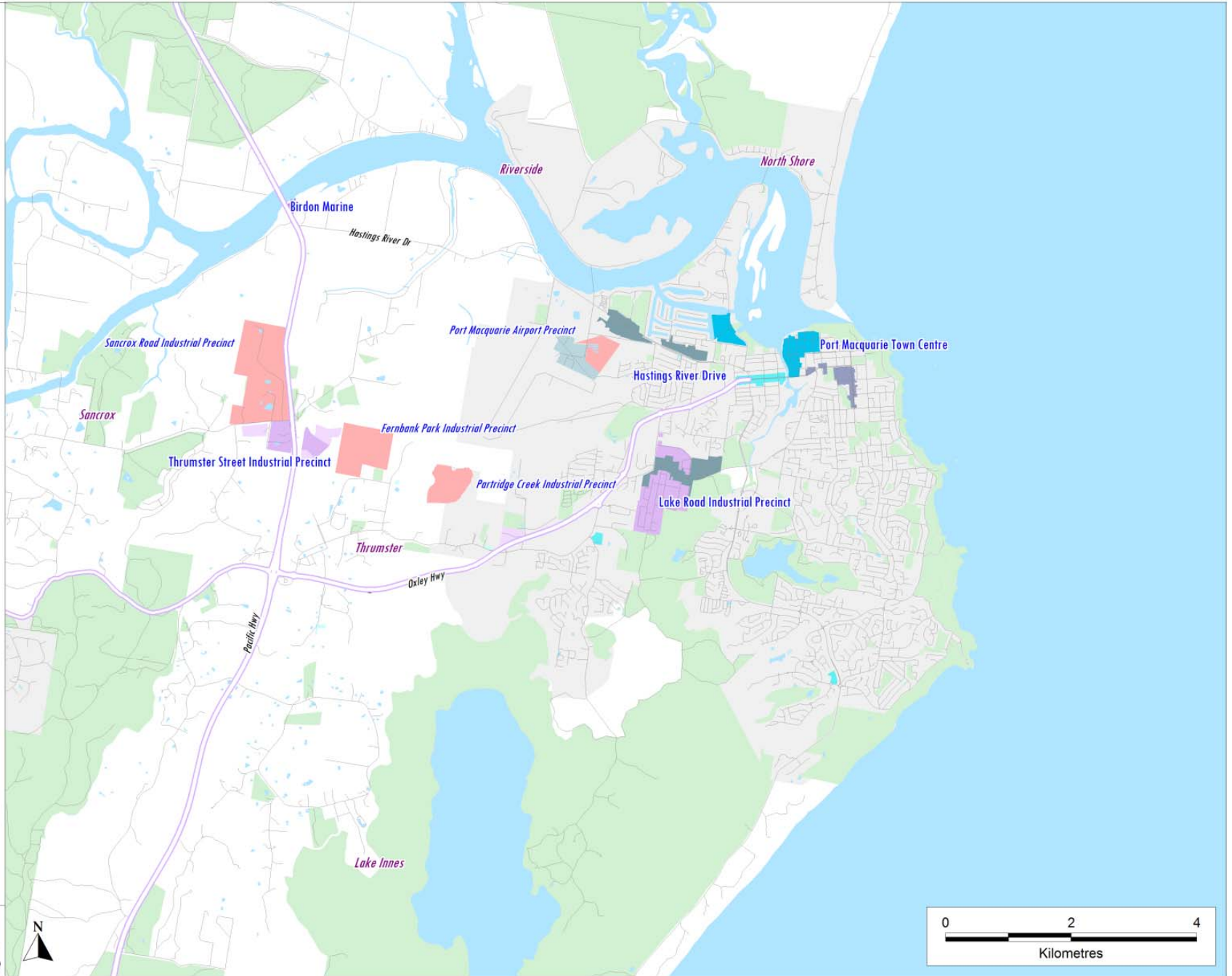
# Map 14.2

## Port Macquarie Employment Land Zones

**Legend \***

**Land Zones**

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts





# Map 14.3

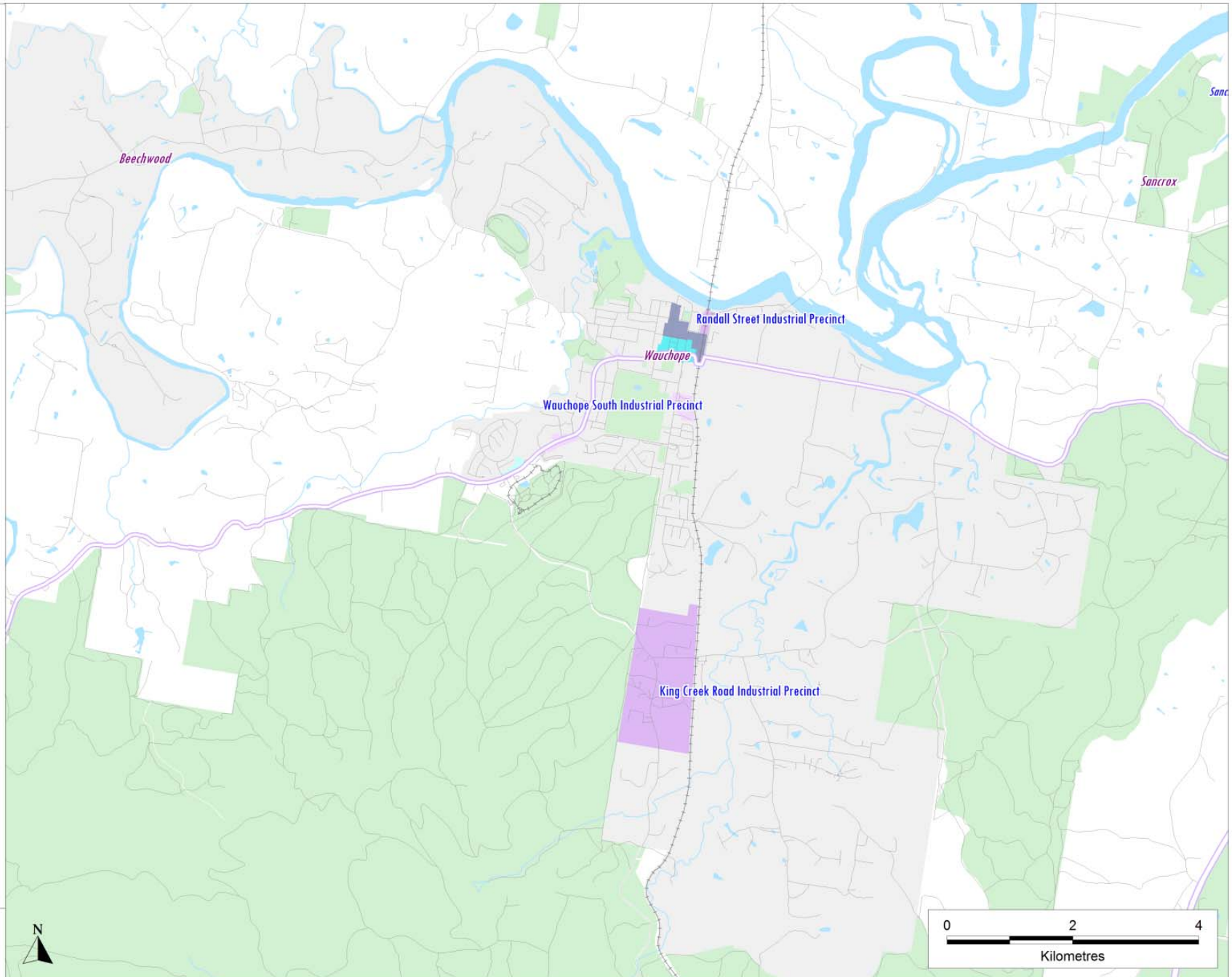
## Wauchope

### Employment Land Zones

#### Legend \*

##### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 14.5.2 Industrial – Existing supply

- In the Port Macquarie-Hastings LGA, all four industrial land use classifications apply including IN1 General Industrial, IN2 Light Industrial, IN3 Heavy Industrial and IN4 Working Waterfront.
- Approximately 67% of industrial land is zoned IN1 General Industrial, 19% IN2 Light Industrial, 18% IN3 Heavy Industrial and 1% IN4 Working Waterfront.
- As presented below, ten industrial precincts have been identified in the Port Macquarie-Hastings LGA.

**Table 14.9**

**Established Industrial Precincts\* - Port Macquarie-Hastings LGA**

<b>Name</b>	<b>Total Area (hectares)</b>	<b>Developed (hectares)</b>	<b>Developed (%)</b>
Kings Creek Industrial Precinct (Bago Rd)	120.0	87.0	73%
South Herons Creek Industrial Precinct	100.0	56.2	56%
Sancrox Road Industrial Precinct	90.0	40.0	44%
Lake Road Industrial Precinct	80.0	76.0	95%
Airport	24.0	14.7	61%
Hastings River Drive	16.5	13.4	81%
Wauchope South Industrial Precinct (CBD)	12.0	8.0	67%
Randall Street Industrial Precinct	10.0	6.0	60%
Belbowrie	9.0	8.8	98%
Birdon Marine	2.0	2.0	100%
<b>Total</b>	<b>463.5</b>	<b>312.1</b>	<b>67%</b>

\* Some existing provision is in B7 Business Park zoned land

Source: MacroPlan Dimasi

Key findings pertinent to our research include:

- Of the total, it is estimated that around 312.1 hectares or 67% of this land is developed. Assuming there are no constraints, it is estimated there is potentially 151.4 hectares of zoned industrial land available for future development.

- Notably, at an average floorspace ratio of 0.6:1, this equates to approximately 91 hectares of industrial floorspace.
- Notably, there are three large precincts (i.e. greater than 90 hectares) and four smaller precincts (less than 15 hectares).
- The **Lake Road Industrial Precinct** is located 3km from Port Macquarie CBD. Bounded by Lake Road to the north, the precinct is situated approximately 6km from the Pacific and Oxley Highway junction.
- Existing uses at this precinct include a prominent bulky goods strip along Lake Road (e.g. Bunnings, Bing Lee, The Good Guys, Sleep City, Super A-Mart, Repco, Doors Plus, SpotLight, etc.), and more traditional 'industrial' businesses and uses such as the private transport depots (e.g. Port Macquarie Taxi Cabs and the Collins Bus Service bases), building suppliers (Boral concrete), steel fabricators, removalists, equipment hire (Kennards Hire), plumbers/electricians, wholesalers, building, engineering, commercial laundry and glass glaziers.
- The **Wauchope Industrial Precinct** is located approximately 2km south of Wauchope. Through Kings Creek Road, the precinct has access to the Oxley Highway and onto the Pacific. Existing tenants include a range of small businesses servicing the local and regional areas (e.g. North Coast Fire Systems, Proudtrans Regional Freight, Kazac Civil, Bago Woodworks, etc.)
- The **South Herons Creek Industrial Precinct** is located within the Township of Herrons Creek. Through Herrons Creek Road, the precinct has direct access to the Pacific Highway, and more importantly key trade regional locations along the Mid North and Far North Coast. The sole existing use within the precinct is the Herrons Creek Timber Mill.
- The **Sancrox Road Industrial Precinct** is located approximately 5km west of Port Macquarie, and falls outside the perimeter of the town and surrounds. Through Sancrox Road, the precinct has access to the Pacific Highway, and more importantly key trade regional locations along the Mid North and Far North Coast. The precinct sole existing use is a spare part warehouse (Expressway Spares).

### 14.5.3 Industrial – Future supply

- Approximately 197 hectares of future industrial land has been identified for the Port Macquarie-Hastings LGA.
- A summary of land areas and potential delivery times is presented in the next table.

**Table 14.10**

**Future Industrial Precincts - Port Macquarie LGA**

<b>Precinct</b>	<b>Land Area (Hectares)</b>	<b>Timing (Years)</b>
Sancrox Road Industrial Precinct	70.0	1 - 10
Partridge Creek Industrial Precinct	35.0	1 - 10
Thrumster Street Industrial Precinct	24.0	1 - 10
Fernbank Park Industrial Precinct	20.0	1 - 10
Birdon Marine	4.2	1 - 10
Airport Industrial Precinct	40.0	10 - 20
Area 14 (Bonny Hills)	4.0	10 - 20
<b>Total</b>	<b>197.2</b>	

*Source: MacroPlan Dimasi*

- The **Sancrox Industrial Precinct** has a proposed developable zoned land area of 70 hectares. The site has potential for export and larger businesses, with a layout capable of providing sub precincts.
- Already zoned for industrial uses, **Partridge Creek Industrial Precinct** could be delivered over the next ten years. It is also expected to be a dedicated export and large businesses precinct.
- As advised by Port Macquarie Council, expansion of the **Airport Industrial Precinct** is under investigation and is expected to comprise of 40 hectares. It will serve as a site for business technology and local services provision and is earmarked for development over the next twenty years.

#### 14.5.4 Retail & Commercial – Existing supply

The Port Macquarie-Hastings LGA has the largest resident population of all nine LGAs in the Mid North Coast region, supporting a resident population of approximately 77,800 persons, in addition to tourism visitation which equates to an equivalent year-round population of about 7,700 persons (equivalent to about 10% of the resident population).

A population of this scale, coupled with inflows from surrounding LGAs means that the Port Macquarie supports a relatively comprehensive retail/commercial centres hierarchy, in particular an extensive provision of retail, commercial, health, entertainment, civic/community and administrative facilities in the Greater Port Macquarie CBD.

The Port Macquarie-Hastings LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 14.3 and Map 14.4.

- The Port Macquarie-Hastings LGA centres hierarchy generally consists of the following structure – as defined by Council in its UGMS:
  - Port Macquarie Regional Centre (also referred to as the Greater Port Macquarie CBD in the UGMS) – which includes Settlement City, Port Central and surrounds and Gordon Street.
  - Wauchope and Laurieton Town Centres.
  - Large Villages (such as Lakewood, Lake Innes, Lake Cathie/Bonny Hills).
  - Future Large Village centres (identified for Bonny Hills and Thrumster).
  - Small Villages (such as North Haven, Kew, Kendall, etc.)

#### **Port Macquarie Regional Centre**

- The Port Macquarie Regional Centre (Greater CBD) is the major retail, commercial, leisure, tourism, administrative and health centre for the Port Macquarie Hastings LGA and indeed, the surrounding areas of Kempsey and Greater Taree. The majority of the business zoned land (164.7 ha) within the regional centre is located within the Greater Port Macquarie CBD, including



16.4 ha of B2 zoned land and 42.4 of B3 zoned land, as well as all of the B5 and B7 zoned land in the LGA.

- Major retail and commercial facilities supported within the Port Macquarie Regional Centre include:
  - Settlement City, a sub-regional shopping centre providing approximately 18,700 sq.m of retail floorspace, anchored by a Big W discount department store and Woolworths supermarket. The centre also provides a range of mini-major tenants including Best & Less and The Reject Shop, as well as providing a range of retail specialty stores. Settlement City is located approximately 2 km west of the Port Macquarie CBD.
  - Port Central, anchored by a Target discount department store and Supa IGA supermarket, is a sub-regional shopping centre located in the Port Macquarie CBD that provides approximately 15,150 sq.m of retail floorspace.

### **Town Centres**

- The Wauchope Town Centre currently serves the convenience needs of the western Port Macquarie-Hastings population. This centre provides 24.9 ha of business zoned land including 2.3 ha of B1 zoned land and 10.3 ha of B2 zoned land. The centre currently supports two medium size IGA supermarkets.
- The Laurieton Town Centre (also referred to as the Camden-Haven Town Centre in the MNCRS 2006) includes the broader provision of retail and ancillary non-retail uses at Lakewood and North Haven. There is 1.2 ha of B1 zoned land and 15.8 ha of B2 zoned land in the town centre. Across the broader town centre, there is an estimated 12,000 sq.m of retail floorspace, including the Woolworths anchored Lakewood Shopping Centre and the Coles anchored Haven Plaza.

### **Large Villages**

- Large Village centres across the LGA include, Lake Innes, Lake Cathie/Bonny Hills and Lighthouse Plaza (which is part of the Port Macquarie urban area).
- These villages tend to be anchored by a supermarket/neighbourhood shopping centre and provide a decent convenience offer, as well as supporting non-retail/business services. These centres generally support a Coles or Woolworths supermarkets, of around 3,000 sq.m, in addition to supporting specialty retail.
- Future villages are identified in the new residential growth areas around Thrumster (Area 13) and Bonny Hills/Lake Cathie (Area 14). These centres are expected to support additional retail and ancillary non-retail floorspace. A recent rezoning for the Thrumster Town Centre was approved by the Minister, which reduces the amount of B2 and B5 zoned land, but increases the amount of B4 and R3 zoned land within the town centre.

### **Small Villages**

- There are a number of small village centres distributed elsewhere across the LGA, generally serving the convenience needs of the immediate surrounding populations in these areas. These tend to provide a limited mix of retail and non-retail floorspace, with the retail provision generally less than 2,000 sq.m.

# Map 14.4

## Port Macquarie-Hastings Council

### Retail Provision

#### Legend \*

Port Macquarie-Hastings Council Boundary

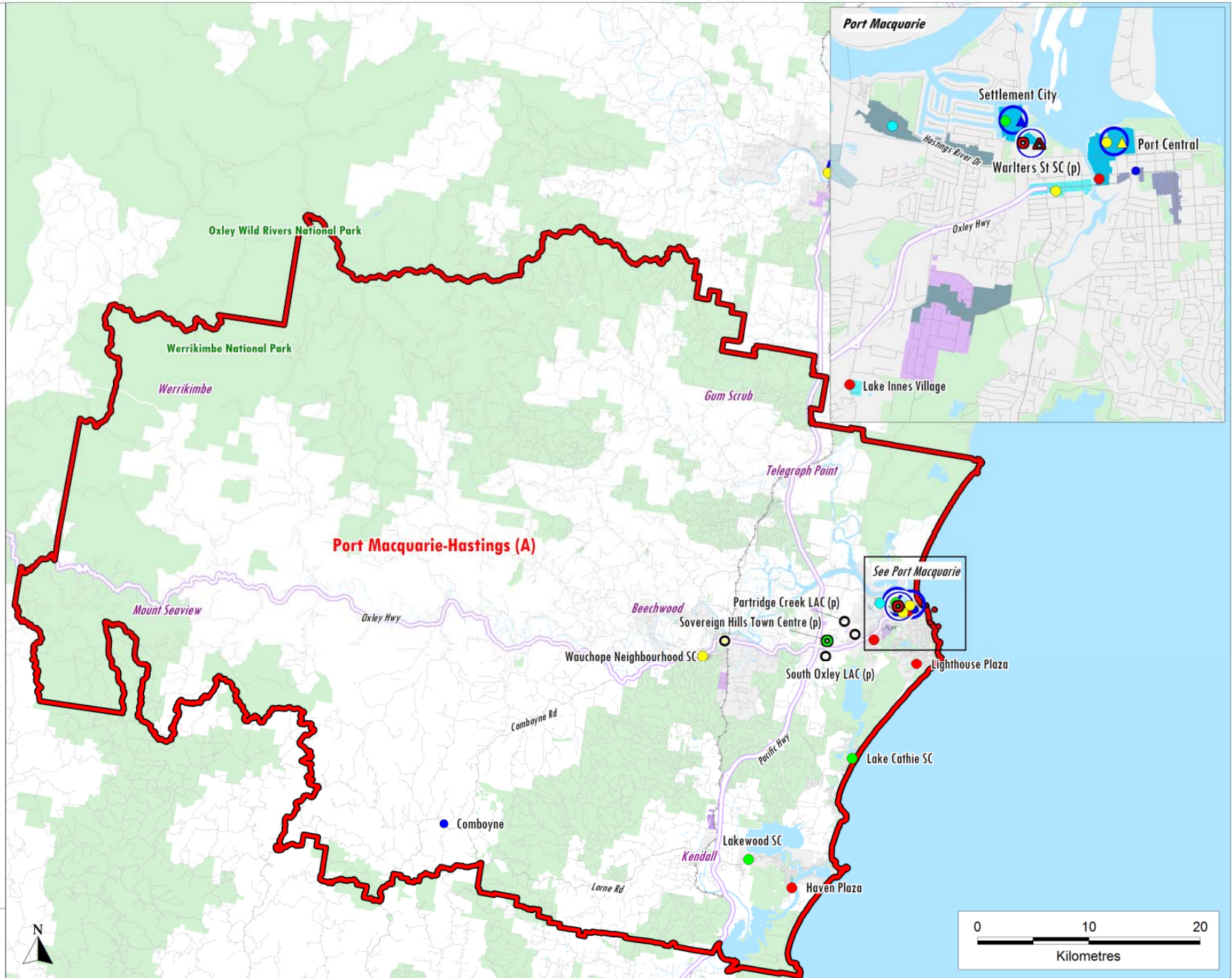
#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

#### Retail Competition

- Sub-Regional Centre
- Big W
- Target
- Kmart
- Potential DDS
- Woolworths
- Coles/Bi-Lo
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores





# Map 14.5

## Port Macquarie-Hastings Council

### Bulky/ Homemaker Centres

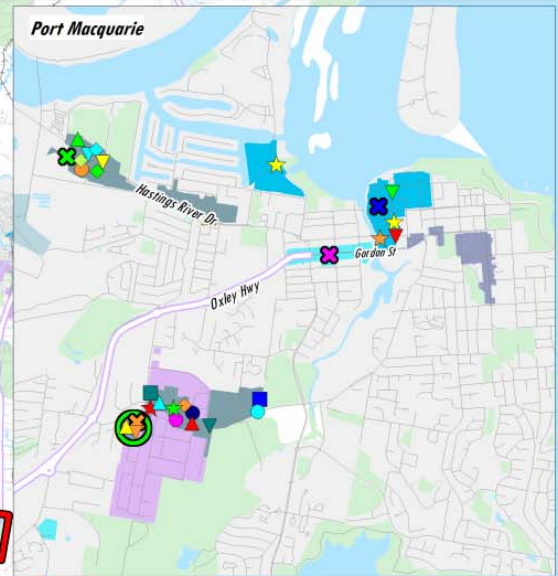
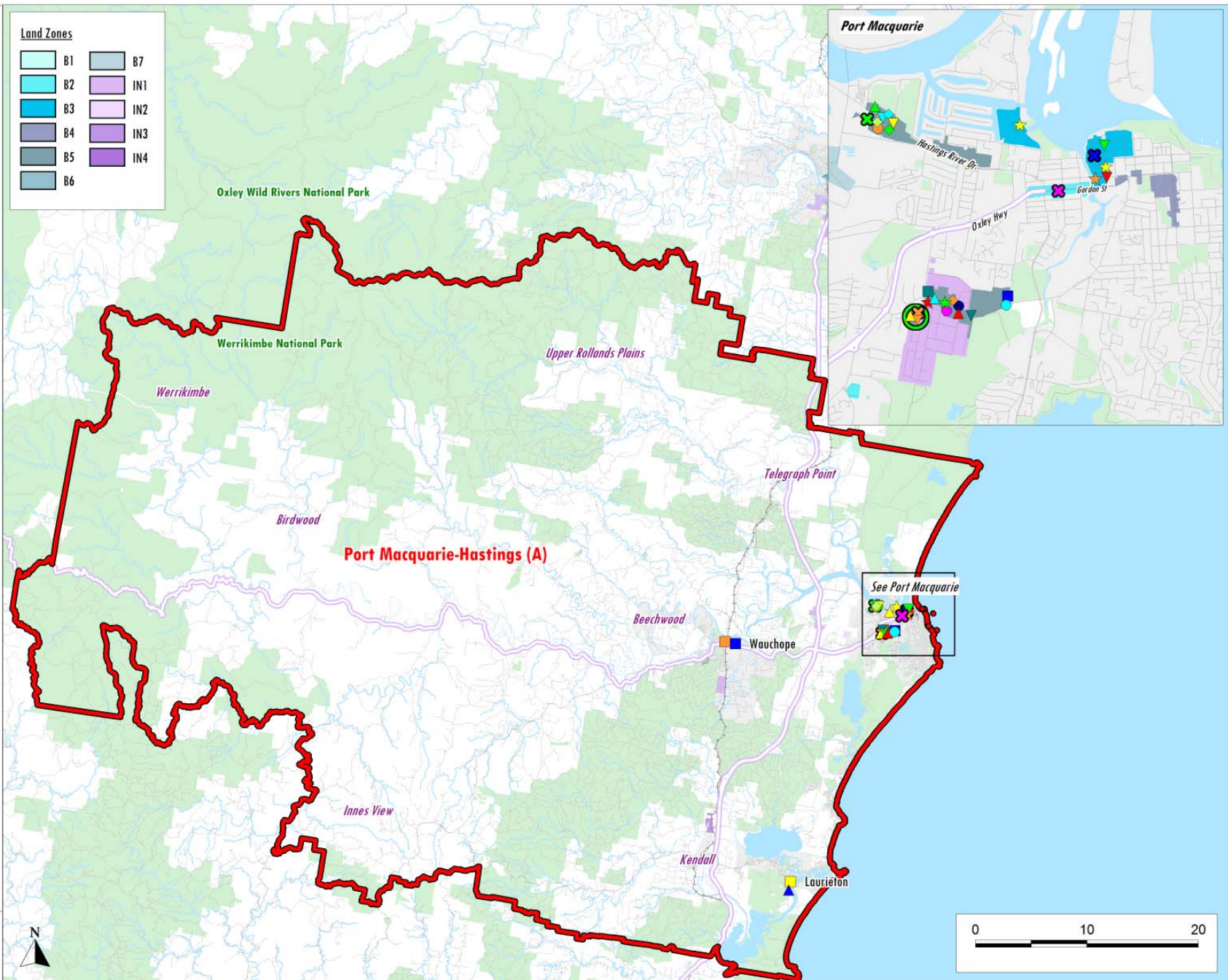
#### Legend \*

Port Macquarie-Hastings Council Boundary

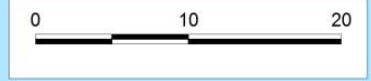
#### Bulky Goods Retailers

- Bunnings Warehouse
- Home Hardware
- Mitre 10
- Clark Rubber
- Godfreys
- House
- Howards Storage World
- Lincraft
- Spotlight
- Autobarn
- Bursons
- Jaycar Electronics
- Repco
- Super Cheap Auto
- Carpet Court
- Carpet One
- Forty Winks
- Snooze
- Bing Lee
- Dick Smith
- JB Hifi
- The Good Guys
- Fantastic Furniture
- Harvey Norman
- OzDesign
- Super A Mart
- Anaconda
- BCF
- Officeworks
- Rebel Sport

Land Zones	
B1	B7
B2	IN1
B3	IN2
B4	IN3
B5	IN4
B6	



See Port Macquarie



### **Business zoned land capacity for retail and commercial floorspace**

Table 14.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **220.0 hectares of business zoned land** within the Port Macquarie-Hastings LGA, of which 8.9 ha is B1 zoned land, 45.2 ha is B2 zoned land and 42.4 ha is B3 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There are about 62.3 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses can locate in other zones, and in some circumstances, within industrial zoned precincts. However, in the Port Macquarie-Hastings LGA, typical bulky goods uses are not permitted in industrial zoned land.
- There is also 35.7 ha of B4 zoned land and 25.6 ha of B7 zoned land within the LGA.
- We have applied FSRs for each business zone type from Port Macquarie Hastings LEP 2011 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Port-Macquarie LGA to be in the order of 2,199,717 sq.m.
- We estimate that there is a net inflow from the LGA in the order of about 10%, with outflows of expenditure more than matched by inflows from the Nambucca, Kempsey and Greater Taree LGAs – in particular for higher order/bulky goods retailing. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an indicative understanding of the suitability of the zoned business land stock to meet future demand.

**Table 14.11**  
**Port Macquarie-Hastings LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B1	8.9	0.4	89,098
Total B2	45.2	1.1	451,879
Total B3	42.4	2.4	423,538
Total B4	35.7	1.2	356,556
Total B5*	62.3	1.1	622,807
Total B7*	<u>25.6</u>	<u>1.0</u>	<u>255,840</u>
<b>Total LGA</b>	<b>220.0</b>		<b>2,199,717</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

#### 14.5.5 Retail & Commercial – Future supply

There are a number of retail developments proposed within the Port Macquarie-Hastings LGA, those of significance include:

- Warlters Street Shopping Centre, in Port Macquarie has development approval for Stage 1 which will include a 6,500 sq.m Kmart dds and 1,000 sq.m of specialty floorspace. There is also potential for further stages to include up to 9,000 sq.m of retail floorspace and include a Coles supermarket.
- A Woolworths supermarket is proposed for construction as part of the Sovereign Hills Town Centre. The town centre is proposed to include 5,725 sq.m of retail floorspace including a Woolworths supermarket of 2,500 sq.m.
- A rezoning application has been lodged to allow the construction of a 13,457 sq.m Masters Home Improvement store on John Oxley Drive in Port Macquarie.
- There are also a number of proposed neighbourhood centres in the Port Macquarie growth area to the west of the main metropolitan area, these are

proposed for Partridge Creek, South Oxley, and West Lindfield. These centres will most likely include small supermarkets and a few specialty retailers.

#### 14.5.6 Special Uses – Existing supply

- In accordance with the Port Macquarie-Hastings LEP 2011, the LGA has two 'Special Use' categories; SP2 Infrastructure and SP3 Tourist.
- As such, of the 1,350 hectares of zoned urban land dedicated to Special Uses, 284.7 have been incorporated into calculations.
- The SP2 Infrastructure category includes 215.3 hectares for an air transport facility (i.e. Port Macquarie Airport) and 9.9 hectares for a health service facility (i.e. Port Macquarie Base Hospital) – as presented in Table 14.12.

**Table 14.12**

**Identified Special Use Sites - Port Macquarie-Hastings LGA**

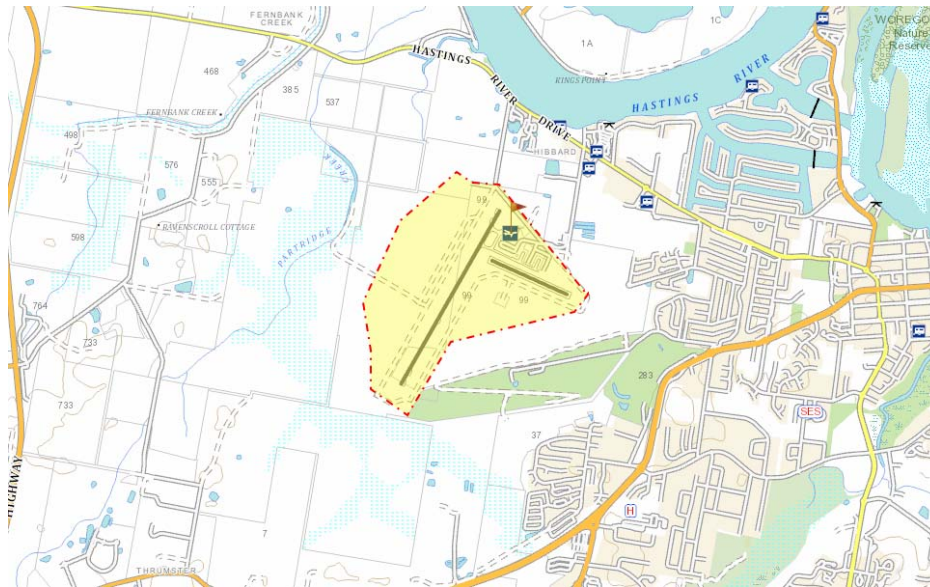
<b>Name</b>	<b>Total Area (hectares)</b>
Port Macquarie Airport	215.3
Port Macquarie Base Hospital	9.9
<b>Total</b>	<b>225.2</b>

*Source: NSW Department of Planning and Environment (2014)*

- The Port Macquarie Airport constitutes the largest share of SP2 facilities. Comprising of 215.3 hectares, we estimate that approximately 129 hectares of this land has been developed, with a further 86 hectares of available land to be developed into the future.



**Figure 5. Port-Macquarie Airport Regional Context**

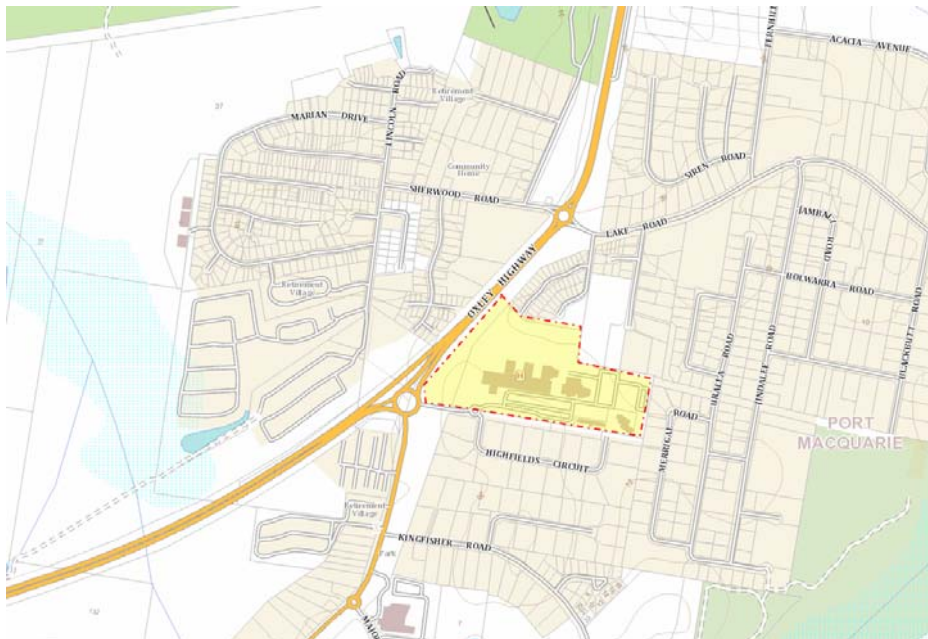


Source: SIX maps (NSW Department of Planning and Environment)

- The Port Macquarie Base Hospital encompasses the largest share of health service facilities (9.9 hectares). Of this zoned land, we estimate that approximately 3.96 hectares has been developed, with a remaining 5.94 hectares available for future development. Hospital services include; specialist wards/units for general medicine, surgery, day surgery, planned and emergency theatre service, coronary care, intensive care, obstetrics, paediatrics, 24 hour emergency department, oncology, palliative care, rehabilitation, stroke, acute renal dialysis, high dependency and mental health and extensive range of outpatient clinics.



**Figure 6. Port Macquarie Base Hospital regional context**



Source: SIX maps (NSW Department of Planning and Environment)

- There is also approximately 59.5 hectares of land zoned for 'Tourism' purposes. The largest precinct comprising SP3 zoned land is currently occupied by Timbertown Heritage Village. There is also a parcel of land along Hastings River Drive occupied by SP3 zoned land.

**Figure 7. SP3 zoned land along Hastings River Drive**



Source: SIX maps (NSW Department of Planning and Environment)

### 14.5.7 Special Uses – Future supply

- The Port Macquarie Base Hospital is currently undergoing a major redevelopment worth \$110 million which will be opened in 2015.
- The project involves the construction of a 4 storey building at the western end of the site adding approximately 12,000 m<sup>2</sup> of floor space. There will be additions and expansions to general medicine, surgery, day surgery, planned and emergency theatre service, coronary care, intensive care, obstetrics, paediatrics, 24 hour emergency department, oncology, palliative care, rehabilitation, stroke, acute renal dialysis, high dependency and mental health and an extensive range of outpatient clinics.

**Figure 8. The proposed new Port Macquarie Base Hospital building**



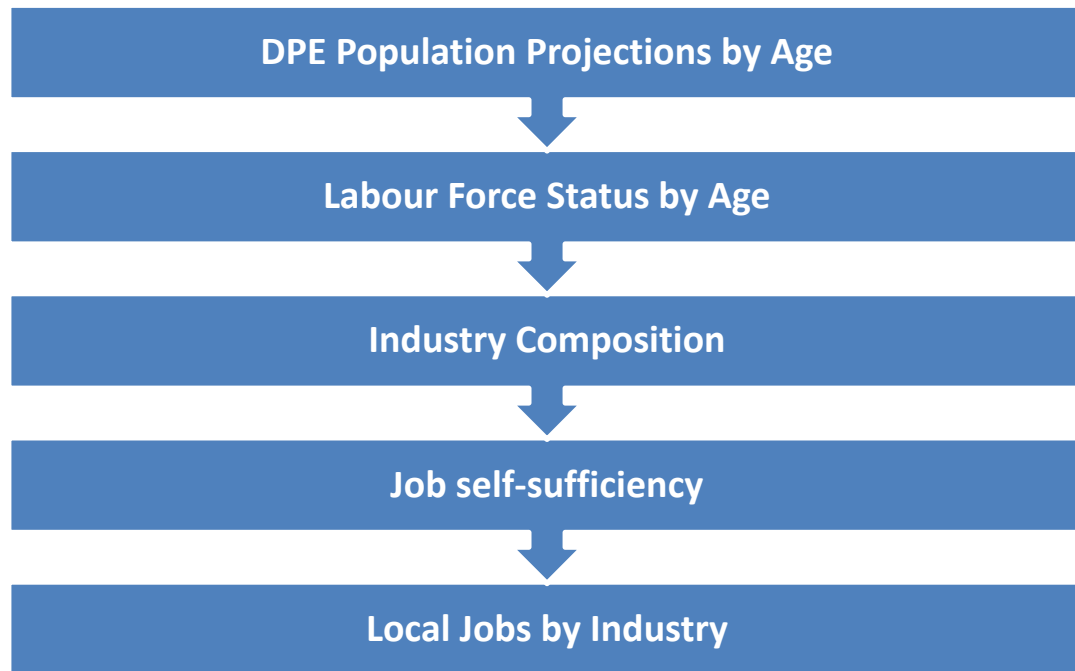
*Source: Watpac 2013*

## 14.6 Demand for employment land

### 14.6.1 Methodology

- In order to ascertain the quantum of commercial, industrial and special use land required in the Port Macquarie–Hastings LGA, we first generate employment projections for the LGA.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of Port Macquarie–Hastings LGA to generate jobs.

- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Port Macquarie–Hastings LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative methodology.

### 14.6.2 Employment Projections

- Following solid growth during the 2006 and 2011 period (+164 jobs per annum), employment growth in the Port Macquarie-Hastings LGA is expected to continue over the forecast period.
- Notably, at an average growth rate of 164 jobs per annum over the 2011 to 2031 period, the projected rate of employment growth is on par with that observed between 2006 and 2011 (average job growth of 164 jobs per annum).
- Overall, the Port Macquarie-Hastings LGA workforce is expected to expand by 3,286 jobs out to 2031.
- Over the decade to 2021, our projections imply an employment gain of 1,536 for the Port Macquarie-Hastings LGA. As a result, this will take the number of jobs in the LGA to 24,858.
- By 2031, employment in the LGA is expected to expand further to 26,608, which represents growth of 1,750 jobs since 2021.
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+991), Education and Training (+501), Retail Trade (+475) and Accommodation and Food Services (+433).
- In contrary, job losses are predicted for four industries, with the greatest contractions earmarked in Manufacturing (-355) and Agriculture, Forestry and Fishing (-247).

**Table 14.13**  
**Employment by Industry - Port Macquarie-Hastings LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	4,065	4,501	5,056	991
Education and Training	2,027	2,263	2,528	501
Retail Trade	3,363	3,512	3,838	475
Accommodation and Food Services	2,218	2,527	2,651	433
Professional, Scientific and Technical Services	1,076	1,234	1,347	271
Electricity, Gas, Water and Waste Services	1,131	1,259	1,401	270
Construction	1,354	1,472	1,601	247
Rental, Hiring and Real Estate Services	480	560	705	225
Transport, Postal and Warehousing	806	951	1,018	212
Wholesale Trade	615	718	751	136
Administrative and Support Services	718	768	849	131
Financial and Insurance Services	603	676	724	121
Other Services	1,044	1,077	1,126	82
Mining	41	69	73	32
Information Media and Telecommunications	260	244	262	2
Public Administration and Safety	1,194	1,161	1,135	-59
Arts and Recreation Services	279	305	220	-59
Other*	122	0	0	-122
Agriculture, Forestry and Fishing	644	470	397	-247
Manufacturing	1,282	1,090	927	-355
<b>Total</b>	<b>23,322</b>	<b>24,858</b>	<b>26,608</b>	<b>3,286</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 14.14**  
Industry and Land Use Conversion Matrix - Port Macquarie-Hastings LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	20%	0%	80%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use type, as presented in Table 14.15.

**Table 14.15**  
Employment Additions by Land Use Type - Port Macquarie-Hastings LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	3	0	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	13	14	115	127	0	0
Construction	12	13	106	117	0	0
Wholesale Trade	83	26	21	6	0	0
Retail Trade	141	310	7	16	0	0
Accommodation and Food Services	216	87	93	37	0	0
Transport, Postal and Warehousing	29	13	116	53	0	0
Information Media and Telecommunications	0	17	0	0	0	0
Financial and Insurance Services	73	47	0	0	0	0
Rental, Hiring and Real Estate Services	80	146	0	0	0	0
Professional, Scientific and Technical Services	158	113	0	0	0	0
Administrative and Support Services	50	80	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	24	27	0	0	213	239
Health Care and Social Assistance	87	111	0	0	349	444
Arts and Recreation Services	26	0	0	0	0	0
Other Services	33	49	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 14.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities (employee per sq.m of floorspace) are applied to employment by industry projections to derive the quantum of future floorspace required in the Port Macquarie-Hastings LGA (presented in Table 14.16).

**Table 14.16**

Indicative Employment Density by Industry and Land Use Type (sq.m per employee) - Port Macquarie-Hastings LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.



**Table 14.17**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Port Macquarie-Hastings LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	550	100	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	510	570	28,870	31,830	0	0
Construction	350	390	15,880	17,510	0	0
Wholesale Trade	2,480	780	4,140	1,290	0	0
Retail Trade	5,650	12,380	1,040	2,280	0	0
Accommodation and Food Services	10,810	4,330	13,900	5,570	0	0
Transport, Postal and Warehousing	870	400	23,190	10,660	0	0
Information Media and Telecommunications	0	510	0	0	0	0
Financial and Insurance Services	1,830	1,180	0	0	0	0
Rental, Hiring and Real Estate Services	1,990	3,640	0	0	0	0
Professional, Scientific and Technical Services	3,960	2,830	0	0	0	0
Administrative and Support Services	1,260	2,010	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	940	1,060	0	0	10,630	11,930
Health Care and Social Assistance	3,490	4,440	0	0	20,950	26,640
Arts and Recreation Services	1,060	0	0	0	0	0
Other Services	1,310	1,950	0	0	0	0
<b>Total</b>	<b>36,510</b>	<b>36,470</b>	<b>87,570</b>	<b>69,240</b>	<b>31,580</b>	<b>38,570</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **36,510 sq.m of commercial**, **87,570 sq.m of industrial** and **31,580 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **36,470 sq.m of commercial**, **69,240 sq.m of industrial** and **38,570 sq.m of special uses** floorspace is expected under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 14.18.



- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a 'truer' depiction of likely actions and decisions made by businesses.

**Table 14.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Port Macquarie-Hastings LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	410	70	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	380	420	21,650	23,870	0	0
Construction	260	290	11,910	13,140	0	0
Wholesale Trade	1,860	580	3,100	970	0	0
Retail Trade	4,240	9,290	780	1,710	0	0
Accommodation and Food Services	8,110	3,250	10,430	4,180	0	0
Transport, Postal and Warehousing	650	300	17,400	8,000	0	0
Information Media and Telecommunications	0	390	0	0	0	0
Financial and Insurance Services	1,380	890	0	0	0	0
Rental, Hiring and Real Estate Services	1,490	2,730	0	0	0	0
Professional, Scientific and Technical Services	2,970	2,120	0	0	0	0
Administrative and Support Services	940	1,510	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	710	800	0	0	7,970	8,940
Health Care and Social Assistance	2,620	3,330	0	0	15,710	19,980
Arts and Recreation Services	790	0	0	0	0	0
Other Services	980	1,460	0	0	0	0
<b>Total</b>	<b>27,380</b>	<b>27,360</b>	<b>65,680</b>	<b>51,940</b>	<b>23,680</b>	<b>28,920</b>

*Source: MacroPlan Dimasi*

- The Alternative scenario indicates **27,380 sq.m of commercial, 65,680 sq.m of industrial** and **23,680 sq.m of special use** floorspace demand will materialise by 2021.
- Over the ten years to 2031, an additional **27,360 sq.m of commercial, 51,940 sq.m of industrial** and **28,920 sq.m of special uses** of floorspace is required.

#### 14.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to derive demand for employment land over the forecast period.
- FSR data for Port Macquarie LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs for business zones include:
  - B1 Neighbourhood Centre 1.0:1
  - B2 Local Centre 1.0-1.5:1
  - B3 Commercial Core 2.5-3.5:1
  - B4 Mixed Use 1.0-1.5:1 and
  - B7 Business Park 0.65:1.
- As such, a FSR of 1.5:1 has been applied across all business zones.
- For other land uses, we have relied on average FSRs observed across the broader North Coast region (as presented in Table 14.19).
- Based on derived requirements and average floorspace ratios, MacroPlan Dimasi estimates around an additional **3.6–4.9 hectares of commercial, 11.8 hectares of retail, 19.6–26.1 hectares of industrial and 6.6–8.8 hectares of special uses** land will be required by 2031.

Table 14.19

Demand for Employment Land (2031) - Port Macquarie-Hastings LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	5.5 - 7.3	1.5	3.6 - 4.9
Industrial	11.8 - 15.7	0.6	19.6 - 26.1
Special Uses	5.3 - 7.0	0.8	6.6 - 8.8

Source: MacroPlan Dimasi

### 14.6.5 Demand for retail floorspace

The potential drivers of future demand for retail floorspace in the Port Macquarie-Hastings LGA are summarised below:

- Population growth – which is expected to be moderate-strong, growing at an average of 0.9% per annum to 2031 (a net increase of 20.7% or 15,550 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.
- Online shopping – online retail growth grew very rapidly between 2010 and 2012/13, at more than 20% per annum, primarily because online sales were starting from a very low base. Online growth rate per annum has is still very strong, but is decreasing in size and the lines have become increasingly blurred as to what constitutes a purchase 'online or in store. Internet sales now contribute about 6% of total retail sales (excluding food catering), a proportion which has plateaued in recent times. We do not consider the impact of the internet as a medium for purchase to have a noticeable impact on the demand for, and the planning need, for future physical retail floorspace. Most retailers have now adapted their strategies to be omni-channel and the physical store is considered to be a very relevant component of this strategy.

#### Quantification of demand

Table 14.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Port Macquarie-Hastings LGA, presently, and at five yearly intervals to 2031. This table also

presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 14.20 shows the following:

- The residential population of the Port Macquarie-Hastings LGA generates approximately **159,100 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **58,900 sq.m** by 2031, an increase of about **34%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **15,700 sq.m**, and is expected to increase by about **5,300 sq.m** by 2031.

Total retail demand growth equates to an equivalent land requirement of **11.8 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

**Table 14.20**  
**Port Macquarie-Hastings LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\***

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	77,830	79,550	83,600	87,400	90,800	0.9%
Tourism equiv. pop	7,663	7,832	8,231	8,605	8,940	0.9%
<b>Retail exp. (\$M)</b>						
Food & liquor	435	452	496	543	592	1.8%
Food catering	111	116	129	143	157	2.1%
Apparel	83	85	91	98	104	1.3%
Household	165	170	182	194	206	1.3%
Leisure	46	47	51	55	60	1.6%
General	76	79	88	97	106	2.0%
Retail services	<u>27</u>	<u>28</u>	<u>30</u>	<u>33</u>	<u>35</u>	<u>1.6%</u>
<b>Total</b>	<b>944</b>	<b>977</b>	<b>1,066</b>	<b>1,163</b>	<b>1,261</b>	<b>1.7%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	48,377	50,198	55,061	60,382	65,809	1.8%
Food catering	18,494	19,285	21,417	23,779	26,239	2.1%
Apparel	15,120	15,534	16,621	17,781	18,903	1.3%
Household	55,049	56,556	60,513	64,733	68,822	1.3%
Leisure	7,607	7,855	8,510	9,217	9,922	1.6%
General	12,691	13,208	14,595	16,125	17,705	2.0%
Retail services	<u>4,520</u>	<u>4,667</u>	<u>5,056</u>	<u>5,476</u>	<u>5,895</u>	<u>1.6%</u>
<b>Total</b>	<b>159,156</b>	<b>164,791</b>	<b>179,803</b>	<b>196,172</b>	<b>212,747</b>	<b>1.9%</b>
<b>Floorspace per capita</b>	<b>2.04</b>	<b>2.07</b>	<b>2.15</b>	<b>2.24</b>	<b>2.34</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	7,663	7,832	8,231	8,605	8,940	0.9%
Floorspace per capita	<u>2.04</u>	<u>2.07</u>	<u>2.15</u>	<u>2.24</u>	<u>2.34</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>15,670</b>	<b>16,225</b>	<b>17,703</b>	<b>19,315</b>	<b>20,947</b>	<b>1.7%</b>
<b>Total retail demand (sq.m)</b>	<b>174,827</b>	<b>181,016</b>	<b>197,506</b>	<b>215,487</b>	<b>233,694</b>	<b>1.7%</b>
<b>Demand growth (14-31)</b>					<b>58,867</b>	
<b>Estimated land take (ha)</b>					<b>11.8</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 14.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Port Macquarie LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Port Macquarie LGA.

Key findings pertaining to our gap assessment are presented in Table 14.21

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	220.0	66.0	4.0	70.0	16.1	53.9
Industrial	463.5	151.4	197.2	348.6	22.9	325.7
Special Uses	284.7	86.0	0.0	86.0	7.7	78.3

Source: MacroPlan Dimasi

- Overall, there is sufficient land in Port Macquarie-Hastings LGA to accommodate future employment needs out to 2031.
- More specifically, it is estimated over the forecast period:
  - *Supply of business land will exceed demand by 53.9 hectares*
  - *Supply of industrial land will exceed demand by 325.7 hectares*
  - *Supply of special uses land will exceed demand by 78.3 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Port Macquarie-Hastings LGA.
- Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in the Port Macquarie-Hastings LGA i.e. compared to that suggested in this land assessment.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent a practical approach to delivering more 'employment' land in the Port Macquarie-Hastings LGA.

## 14.8 Conclusions

### 14.8.1 Commercial, Industrial and Special Uses

Population growth within the Port Macquarie-Hastings LGA has been solid, increasing by 5,285 persons over the five years to 2011. This rate of growth resulted in a total resident population of 75,232 making it the second most populous LGA within the North Coast region.

Unlike the majority of other North Coast LGAs, considerable population gains were recorded for all age cohorts except for the 35-49 cohort (where negative growth of 176 persons was recorded over the 2006-2011 period). Notwithstanding, population growth was greatest for persons aged 50+, increasing by 4,441 persons. The growth across the majority of age cohorts reflects the gravitational pull of the LGA in comparison to other North Coast LGAs.

By implication of its resident population, the labour force within the Port Macquarie-Hastings LGA is large and diverse with 23,322 jobs in the LGA – 12.9% of all jobs within the North Coast.

The current employment composition of the Port Macquarie-Hastings LGA reflects its 'tourism' credentials. At 2011, over a quarter (25.1%) of persons employed in the LGA were engaged in the Retail Trade, Accommodation and Food Services and Arts and Recreation Services industries. In recent years, the high Australian Dollar has constrained domestic visitations, however in coming years the Australian Dollar is expected to return to the long term levels which we expect will buoy tourism related employment over the forecast period.

The pronounced population growth in older age cohorts has meant that employment growth over the five years to 2011 was significant within the LGA's largest employing industry - Health Care and Social Assistance industry (+856). This solid gain reflects the \$110 million expansion of the Port Macquarie Base Hospital. Interestingly, unlike other North Coast LGAs, considerable employment growth in Electricity, Gas, Water and Waste Services employment was recorded (+291).

The traditional labour intensive industries such as manufacturing, construction and Agriculture, Forestry and Fishing shed 414 jobs collectively over the 2006-2011 period. For Construction jobs, the completion of Pacific Highway upgrades has eased jobs growth in the sector. However, since the 2011 Census, we expect that there would have been solid growth in the Construction industry as a result of the Port Macquarie Base Hospital expansion, where over 300 jobs have been generated as a result.

Looking ahead, the greatest attribute of the Port Macquarie-Hastings economy is expected to remain in its scale and diversity of employment. Tourism is also expected to be instrumental, which tends to have an impact on a multitude of industries and sectors. Additionally, investment into the new Charles Sturt University campus is expected to provide employment opportunities, both during the construction and operational stages. Moreover, with the campus expected to accommodate an additional 5,000 students, there are substantial flow-on benefits for the broader community and local economy. Overall, this will lead to further inward migration from surrounding LGAs, particularly amongst young working adults (20-34 years).

Key economic and demographic drivers which are expected to influence the Port Macquarie-Hastings LGA include:

- DPE projections suggest population growth will ease from current levels, to 0.9% per annum.
- The Australian Dollar is expected to revert back to long term average levels.



- Large number of major projects – Port Macquarie hospital redevelopment and Pacific Highway upgrades.

These trends are implied in our employment projections:

- Solid employment growth across the majority of industries, particularly for localised health and social services.
- Growth in population driven industries - Education and Training, Professional, Scientific and Technical Services, Retail Trade and Construction industries is expected to remain robust.

A larger workforce is anticipated to result in greater demand for commercial, industrial and special use (e.g. hospitals, education establishments, etc.) in the Port Macquarie-Hastings LGA.

As such, our estimates of demand indicate **54,800–73,100 sq.m of commercial, 58,867 sq.m of retail, 117,710–156,950 sq.m of industrial and 52,650–70,200 sq.m of special use** gross floor area will be required by 2031.

Based on derived requirements and average floorspace ratios, MacroPlan Dimasi estimates around an additional **3.6–4.9 hectares of commercial, 11.8 hectares of retail, 19.6–26.1 hectares of industrial and 6.6–8.8 hectares of special uses** land will be required by 2031.

Overall, there is sufficient land in Port Macquarie-Hastings LGA to accommodate future employment needs out to 2031. It is estimated:

- *Supply of business land will exceed demand by 53.9 hectares*
- *Supply of industrial land will exceed demand by 325.7 hectares*
- *Supply of special uses land will exceed demand by 78.3 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Port Macquarie-Hastings LGA.

Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in the Port Macquarie-Hastings LGA i.e. compared to that suggested in this land assessment.

Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) represent a practical approach to delivering more 'employment' land in the Port Macquarie-Hastings LGA.

#### **14.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Port Macquarie-Hastings LGA:

- The Port Macquarie-Hastings LGA has a well-established retail/commercial centres hierarchy that services the existing residents and tourists, reasonably well. The existing network of centres has been able to, and will generally continue to be able to, absorb future retail development over the next 5 – 10 years.
- Future population growth is expected to be moderate-strong, averaging about 0.9% per annum over the period to 2031, an increase of about 20.7% on current levels, or an additional 15,550 persons.
- A large proportion of this growth is expected to be accommodated in the identified growth areas around Area 13, 14 and 15 (i.e. to the west and south of the Greater Port Macquarie CBD).

- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 58,900 sq.m (a 34% uplift) by 2031, equating to a land requirement of about 11.8 ha.
- Existing retail demand is estimated at 174,800 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 2,199,717 sq.m. However because the retail offer in Port Macquarie is superior to that in surrounding LGAs, we estimate a net inflow of expenditure of about 10% into the LGA, resulting in net demand of about 192,300 sq.m, increasing to 257,000 sq.m by 2031.
- Port Macquarie supports two discount department store based shopping centres (i.e. Settlement City and Port Central), however it does not support any department store anchored shopping centres. Even by 2031, the population will still be of too small a scale to support a department store based shopping centre. This is not to say that new retail formats/concepts may not seek to enter the Port Macquarie market in the future, and the planning system should be flexible enough to allow such uses to be considered in the context of their net community benefits.
- The large B2 zoned precinct at the Warlters Street site at Settlement City, is expected to accommodate a new sub-regional oriented retail development over the next 3-5 years. We note that in broad terms, there is sufficient capacity of zoned business zoned land across the whole LGA to accommodate estimated demand, however one of the key elements of the Port Macquarie-Hastings Urban Growth Management Strategy 2011 was to ensure the primacy of the Greater Port Macquarie CBD is maintained. Once the Warlters Street site is developed, the provision of available greenfield land within the Greater Port-Macquarie CBD will become limited, given there are few opportunities to zone additional land given environmental and land use constraints.
- The centres identified at Lake Cathie/Bonny Hills, and Thrumster will accommodate the future convenience related demand for the growing populations in these areas. The business zoned land in these areas consists of 0.4 ha of B1 zoned land, 2.3 ha of B2 zoned land and 3.2 ha of B4 zoned land

- The Council retail policy indicates that future applications for new commercial centres, to be established outside the existing and planned hierarchy of centres, should be rejected and that future growth should be focussed in the Greater Port Macquarie CBD.

## Section 15: LGA Analysis – Greater Taree

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Greater Taree LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Greater Taree LGA given a projected rate of demand or take-up i.e. across business, industrial and special purpose land use zonings.

In order to ascertain an employment land 'status' for Greater Taree LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as considered feedback from the DP&E and Greater Taree City Council.

### 15.1 Key facts, findings and take-outs

#### 15.1.1 Population growth

- Over the five years to 2011, the resident population of Greater Taree LGA increased by 1,966 persons – at an average rate of 0.8% per annum.

- Similar to other LGAs in the region, persons aged 50+ accounted for the majority of population growth over the five year period to 2011. The 50-64 and 65+ age cohorts increased by 1,163 and 1,963 persons respectively.
- Between 2006 and 2011, net migration to Greater Taree LGA totalled 1,162 persons. With the exception of young working adults, net increases were registered across all age cohorts.
- DP&E projections suggest population growth will ease from current levels, from 0.8% (2006-2011) to 0.4% per annum (2011-2031), owing to declines in all age cohorts with the exception of the 65+ cohort.

### 15.1.2 Employment trends

- As at 2011, the Greater Taree LGA supported 13,984 jobs, accounting for 7.7% of the North Coast workforce.
- As at 2011, the top four employing industries in the Greater Taree LGA accounted for 53% of total jobs – Health Care and Social Assistance (19.3%), Retail trade (14.9%), Manufacturing (9.9%) and Education and Training (9.1%).
- Over the five years to 2011, the number of employed persons within the Greater Taree LGA declined by 70 jobs.
- Job losses were incurred in thirteen industries over the five year period to 2011. This would have contributed to the outward movement of persons aged 35-49 (in search of employment opportunities).

### 15.1.3 Employment land

- Based on zoning layers issued by the Department of Planning and Environment (July 2014), there are 581 hectares of land zoned for urban employment purposes in the Greater Taree LGA – comprising 28% Business, 42% Industrial and 29% Special Purposes.
- In contrast to the outright decline observed during the 2006-2011 period (-70 jobs), employment growth is expected to resume in the Greater Taree. Underscored by an ageing demographic and investment in logistics,

warehousing and transport infrastructure, the Greater Taree LGA workforce is expected to expand by an additional 589 jobs over the forecast period (i.e. 2011 to 2031).

- Our demand projections indicate **19,960–26,620 sq.m of commercial, 21,732 sq.m of retail, 33,170–44,220 sq.m of industrial and 7,010–9,340 sq.m of special purposes** of floorspace will be required by 2031.
- Based on floorspace demand projections and average observed floor space ratios, MacroPlan Dimasi estimates around **2.0–2.7 hectares of commercial, 4.3 hectares of retail, 3.3–4.4 hectares of industrial and 0.9–1.2 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available to accommodate future employment needs of the Greater Taree LGA out to 2031. It is estimated:
  - *Supply of business land will exceed demand by 26.0 hectares*
  - *Supply of industrial land will exceed demand by 207.5 hectares*
  - *Supply of special purposes land will exceed demand by 20.5 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Greater Taree LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in the Greater Taree LGA, particularly for new and emerging industries.

## 15.2 Literature review

The Draft Greater Taree Conservation and Development Strategy 2005 was prepared to inform the Greater Taree LEP and DCP and develops strategies to ensure that conservation and development are balanced. The MNCRS designates the Taree Major Regional Centre as the key centre in the LGA, supported by two towns (Old Bar and Wingham) and series of several small villages.

The key points from this document are:

- Council estimates that 10% of the local government area is flood affected, constraining development.
- There is a need for more land for major industrial uses and the land to the NE of Taree along the railway line has been recommended as a preferred location.
- Proposed bulky goods/light industry should be located on the corner of Bucketts Way & Manning River Drive, Taree South
- A proposed transport hub or business park may be suited in Cundletown.

## 15.3 Socio-demographic trends

### 15.3.1 Population change

- According to ABS ERP figures, the Greater Taree LGA increased by 1,966 persons from 2006 – 2011, taking the total population to 48,090 persons.

Year	Estimated Resident Population	Total Change (persons)
2001	44,451	
2006	46,124	1,673
2011	48,090	1,966

Source: ABS



- Similar to other LGAs in the region, persons aged 50+ accounted for the majority of population growth over the five year period to 2011.
- The 50-64 and 65+ age cohorts increased by 1,163 and 1,963 persons respectively.
- All other age cohorts registered outright declines, accentuated by a large contraction in the 'upgrader' (35-49) group.

Table 15.2

## Population By Age (persons) - Greater Taree LGA

Age cohort	2006	2011	Change (2006-2011)	Composition
0-19	12,443	12,148	-295	25%
20-34	6,018	5,929	-89	12%
35-49	9,190	8,414	-776	17%
50-64	9,772	10,935	1,163	23%
65+	8,701	10,664	1,963	22%
<b>Total</b>	<b>46,124</b>	<b>48,090</b>	<b>1,966</b>	<b>100%</b>

### 15.3.2 Migration movements

Inward and outward movements for the Greater Taree LGA have been analysed, using 2006 and 2011 Census data (place of usual residence).

- Over the five years to 2011, net migration into the Greater Taree LGA totalled 1,162 persons.
- With the exception of the 20-34 age cohort, net increases were achieved in all age groups.
- A net gain from persons previously living in Sydney constituted the largest net gain (1,173 persons), while there was a net migration loss from persons moving interstate (-277 persons) and elsewhere in the Mid North Coast region (-16 persons).

**Table 15.3**  
Net Migration by Age - Greater Taree LGA

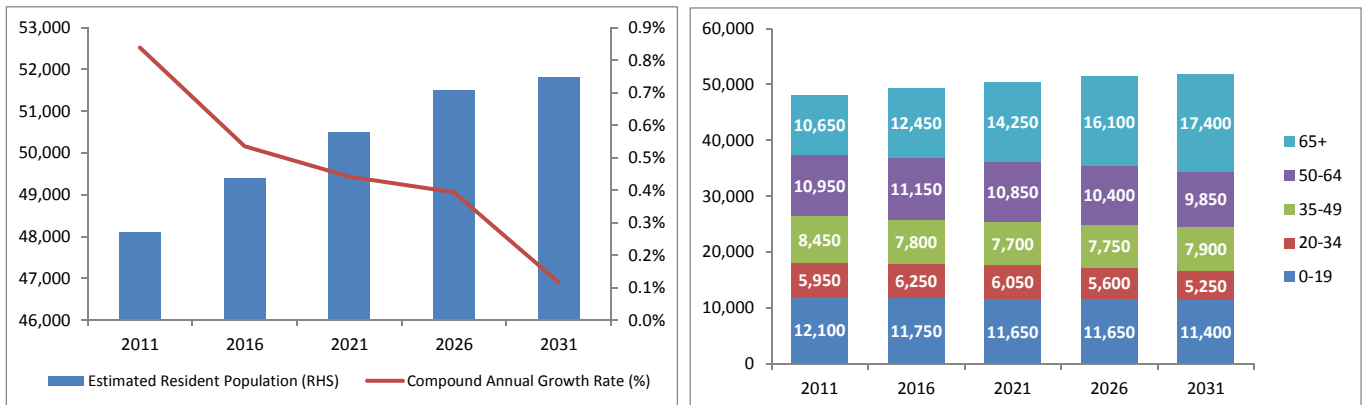
Region	0-19	20-34	35-49	50-64	65+	Total
Mid North Coast	-26	-48	37	-20	41	-16
Sydney	134	-67	339	532	235	1,173
Regional NSW	18	-455	117	176	53	-91
Interstate	-17	-402	-17	86	73	-277
Overseas	77	92	120	59	25	373
<b>Total Net Migration</b>	<b>186</b>	<b>-880</b>	<b>596</b>	<b>833</b>	<b>427</b>	<b>1,162</b>

*Source: ABS*

### 15.3.3 Population projections

- According to the DP&E (2014) projections, the population of the Greater Taree LGA is projected to expand to 51,900 persons by 2031 – an increase of 3,800 persons.
- Over the forecast period (2011 to 2031), DP&E projections imply an average population growth rate of 0.4% per annum for the Greater Taree LGA.
- This rate of population growth is considerably below the rate observed over the five years to 2011 (0.8% per annum).

**Figure 1. Projected Population (2011 to 2031)**



*Source: DP&E, MacroPlan Dimasi*

- Persons aged 65+ are expected to provide all of the population growth out to 2031, while all other age cohorts are expected to decrease from their 2011 total.

- Persons aged 65+ are anticipated to increase by 6,750 persons by 2031.
- Growth in older households is expected to underpin elevated levels of demand for health services in the Greater Taree LGA.

#### 15.3.4 Labour force status

- Of all residents, around 81% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 50% i.e. 18,075 of 35,913 residents<sup>14</sup>.
- Of residents in the labour force, 91% were employed and 9% unemployed (and seeking working) as at 2011.
- The Greater Taree employment rate was lower than that observed for the North Coast region (92%).

**Table 15.4**

**Labour Force Status by Age (number) - Greater Taree LGA**

Age Cohort	Employed	Unemployed	Labour Force	Not in LF	Total
15 - 19	1,193	260	1,453	1,421	2,874
20 - 29	2,198	372	2,570	917	3,487
30 - 39	2,656	292	2,948	1,052	4,000
40 - 49	4,017	338	4,355	1,236	5,591
50 - 59	4,333	294	4,627	2,107	6,734
60 - 69	1,726	110	1,836	4,750	6,586
70 - 79	238	6	244	3,967	4,211
80 - 84	24	4	28	1,281	1,309
85+	14	0	14	1,107	1,121
<b>Total</b>	<b>16,399</b>	<b>1,676</b>	<b>18,075</b>	<b>17,838</b>	<b>35,913</b>

Source: Census of Population and Housing (2011)

<sup>14</sup> Census of Population and Housing (2011)

### 15.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Greater Taree LGA.
- According to Census data, approximately 77.5% of working residents also worked in the LGA.
- The remaining 22.5% of working residents travel either to other North Coast LGAs (10.0%) or locations outside the North Coast (12.5%) for work.
- Of residents who travel to other North Coast locations for work, popular destinations include Great Lakes (7.1%), Port Macquarie–Hastings (1.9%) and Gloucester (0.7%) LGAs.
- According to Census data, approximately 1,409 employed persons commute to the Greater Taree LGA from other locations (of residence) for work.

**Table 15.5**

**Job Containment - Greater Taree LGA**

	<b>Value</b>
Working residents	16,229
<u>Place of Work (number)</u>	
Greater Taree	12,575
North Coast LGAs (ex. Greater Taree)	1,618
Outside North Coast	2,036
<b>Total</b>	<b>16,229</b>
<u>Job Containment (%)</u>	
Greater Taree	77.5%
North Coast LGAs	10.0%
Other	12.5%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Industry specific job containment rates for the Greater Taree LGA are presented in the next table.

- Relative to the all industries average in the Greater Taree LGA (77.5%), eleven industries achieved a higher rate of job containment.
- Of all industries, Wholesale Trade (85.8%) recorded the highest job containment.
- With the exception of Agriculture, Forestry and Fishing (85.1%) and Manufacturing (81.9%), high job containment industries are predominantly service or professional orientated.

**Table 15.6**  
Job Containment by Industry - Greater Taree LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Wholesale Trade	85.8%	5.0%	9.2%	100.0%
Agriculture, Forestry and Fishing	85.1%	3.6%	11.3%	100.0%
Health Care and Social Assistance	84.6%	9.8%	5.6%	100.0%
Retail Trade	84.5%	10.0%	5.5%	100.0%
Accommodation and Food Services	83.5%	6.9%	9.6%	100.0%
Manufacturing	81.9%	6.8%	11.4%	100.0%
Rental, Hiring and Real Estate Services	81.3%	12.7%	6.0%	100.0%
Education and Training	81.2%	12.7%	6.1%	100.0%
Financial and Insurance Services	80.2%	11.4%	8.4%	100.0%
Professional, Scientific and Technical Services	80.0%	7.9%	12.1%	100.0%
Other Services	78.1%	12.4%	9.5%	100.0%
Information Media and Telecommunications	75.9%	9.3%	14.8%	100.0%
Arts and Recreation Services	73.9%	12.1%	14.1%	100.0%
Public Administration and Safety	71.8%	17.4%	10.7%	100.0%
Administrative and Support Services	68.8%	8.2%	23.0%	100.0%
Electricity, Gas, Water and Waste Services	67.8%	23.2%	9.1%	100.0%
Transport, Postal and Warehousing	66.5%	9.5%	24.0%	100.0%
Construction	48.6%	10.4%	41.0%	100.0%
Mining	20.2%	37.1%	42.7%	100.0%
<b>Across all industries</b>	<b>77.5%</b>	<b>10.0%</b>	<b>12.5%</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

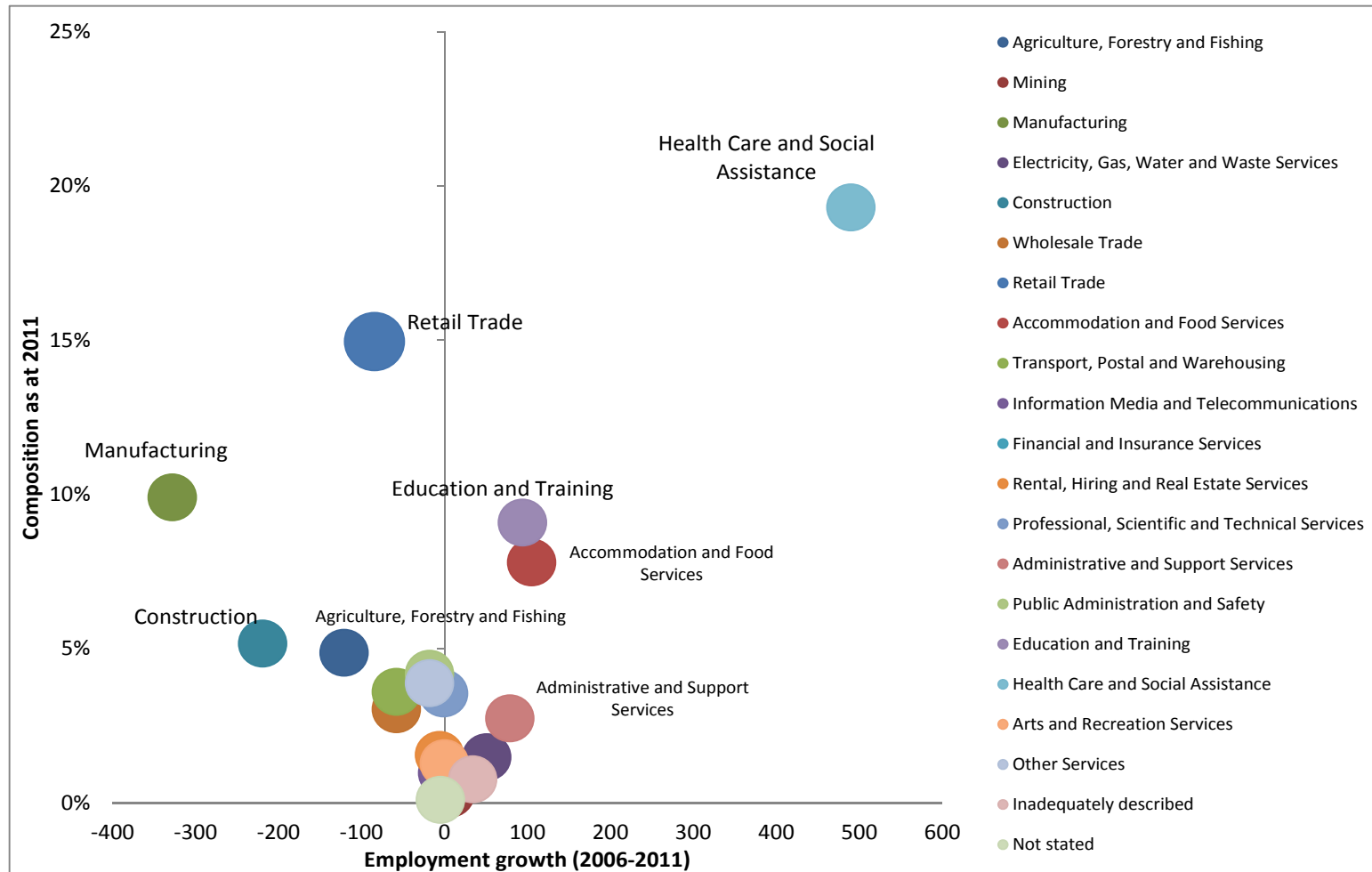
## 15.4 Employment and labour market trends

### 15.4.1 Industry composition

- The purpose of the current analysis is to generate an employment profile for the Greater Taree LGA and identify the key emerging trends and drivers that have 'shaped' its workforce over the last five years.
- Our analysis of employment trends is based on jobs within the LGA rather than on working residents living within the LGA. This is because demand for employment land is supported by jobs and not residents.

- As at 2011, the Greater Taree LGA supported 13,984 jobs, accounting for 7.7% of total jobs in the North Coast (NC) region.
- As at 2011, the top four employing industries in the Greater Taree LGA accounted for 53% of total jobs – Health Care and Social Assistance (19.3%), Retail trade (14.9%), Manufacturing (9.9%) and Education and Training (9.1%).
- This employment profile is similar to the broader region; however the LGA had a higher representation of Health Care and Social Assistance and Manufacturing jobs, while a slightly lower composition of Accommodation and Food Services and Public Administration and Safety jobs.
- Over the five years to 2011, the number of employed persons within the Greater Taree LGA declined by 70 jobs.
- Overall, there were seven industries that experienced employment growth over the period with the greatest growth coming from the Health Care & Social Assistance industry - 490 jobs created over the period.
- On the other hand, there were 13 industries that experienced a decline over the five year period which would have contributed to the outward movement of persons aged 35-49 (in search of employment opportunities).
- The greatest losses to employment occurred within the Manufacturing industry, shedding 328 jobs over the 2006-2011 period.
- Additionally, the Construction and Agriculture, Forestry and Fishing industries experienced job losses of 219 and 121 respectively.

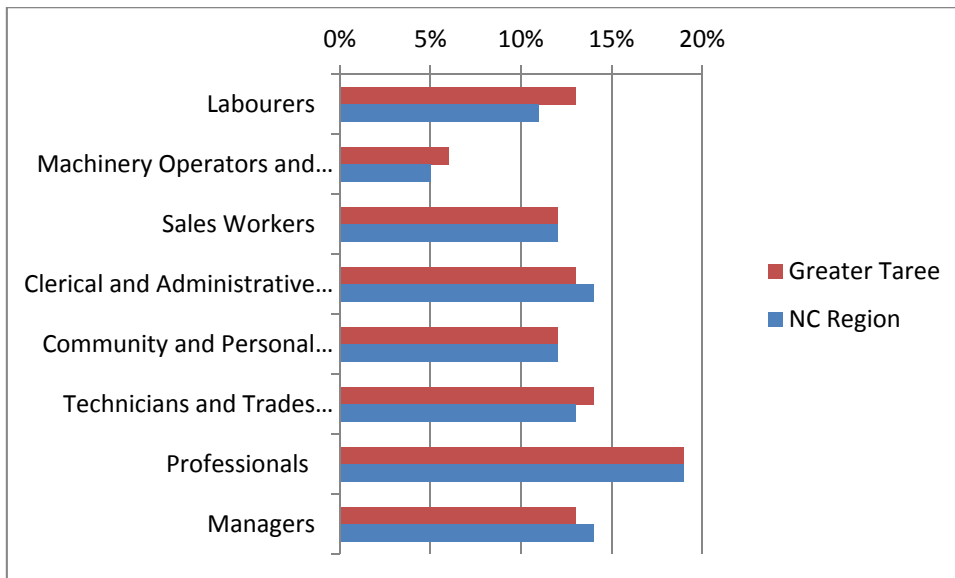
Figure 2. Employment composition and growth by industry, Greater Taree LGA



### 15.4.2 Occupation profile

- As at Census 2011, the occupation profile of the Greater Taree LGA was skewed towards 'professionals' and 'Managers' accounting for 19% and 13% respectively.

**Figure 3. Occupation Composition (2011)**



*Source: Census 2011, MacroPlan Dimasi*

- As at 2011, the occupation profile of the Greater Taree LGA is very similar to the North Coast region, with the only exception being slightly more labourers within the Greater Taree LGA.

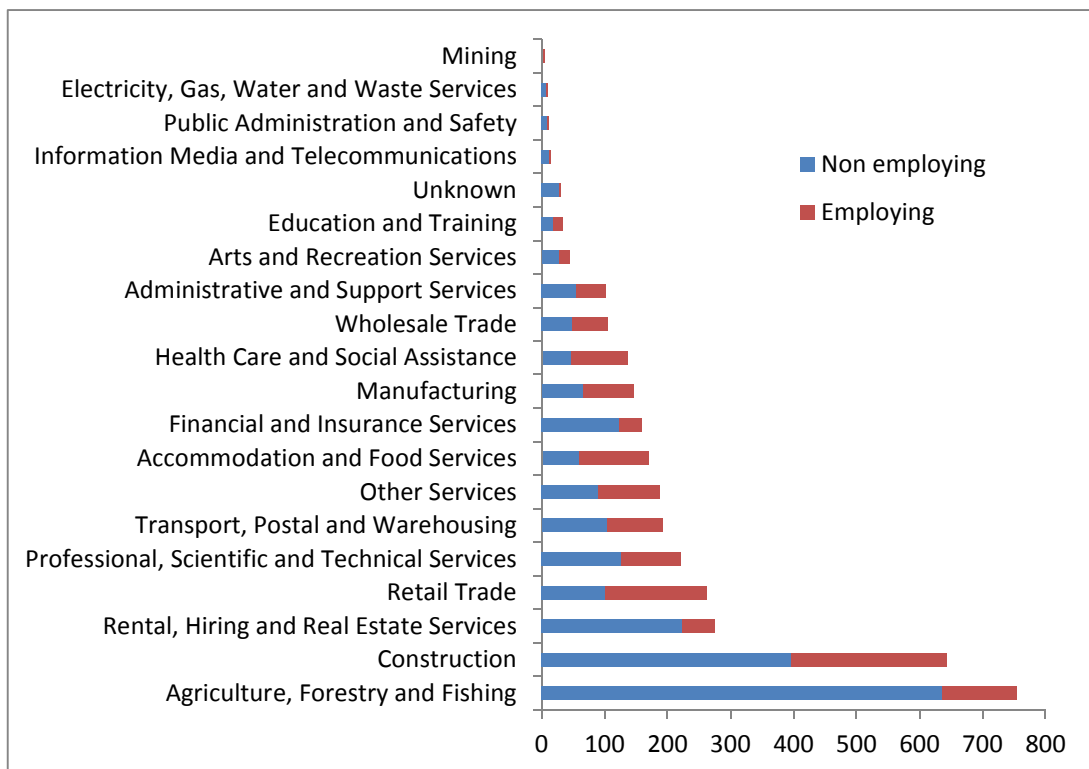
### 15.4.3 Business composition & change

- As at June 2011, there were 3,508 businesses operating within the Greater Taree LGA, with 62% being non-employing/sole trading businesses.
- By industry, the Agriculture, Forestry and Fishing industry had the most businesses (754), followed by Construction (643) and Rental, Hiring and Real Estate Services (275).
- Of businesses that employ, the largest two industries are Construction (247 businesses) and Retail Trade (162 businesses).



- At June 2011, there were three businesses employing 200 or more persons within the Greater Taree LGA – all of which are within Accommodation and Food Services.
- Greater Taree City Council has informed MacroPlan Dimasi that there are other businesses that currently engage more than 200 workers, including the Wingham Meatworks, Greater Taree City Council and the Manning Base Hospital.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses operating within the Greater Taree LGA contracted by 80. The loss in operating businesses was largest within employing businesses (-43)
- Business growth (amongst employing businesses) over the period was most pronounced within Professional, Scientific and Technical Services (+18), Administration and Support Services (+12) and Health Care and Social Assistance (+10).

**Table 15.7**  
**Business Composition and Change - Greater Taree LGA**

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	-17	10	-7
Retail Trade	-10	-5	-15
Accommodation and Food Services	10	-13	-3
Education and Training	-4	0	-4
Construction	-30	-11	-41
Public Administration and Safety	0	-3	-3
Manufacturing	-18	-16	-34
Professional, Scientific and Technical Services	-4	18	14
Other Services	0	-7	-7
Transport, Postal and Warehousing	-16	5	-11
Agriculture, Forestry and Fishing	20	-10	10
Administrative and Support Services	-7	12	5
Wholesale Trade	1	-9	-8
Rental, Hiring and Real Estate Services	-2	4	2
Financial and Insurance Services	17	0	17
Arts and Recreation Services	2	-12	-10
Electricity, Gas, Water and Waste Services	-3	-3	-6
Information Media and Telecommunications	6	-6	0
Mining	0	0	0
Not Classified	18	3	21
<b>Total</b>	<b>-37</b>	<b>-43</b>	<b>-80</b>

*Source: ABS*

#### 15.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Over the last five years, jobs growth has been most pronounced amongst service-based industries e.g. Health Care and Social Assistance (+490), Accommodation and Food Services (+105) and Education and Training (+94). In contrast, employment in 'traditional' industries such as Construction (-219), Manufacturing (-328) and Agriculture, Forestry and Fishing (-121) has decreased.
- The Greater Taree LGA has experienced solid population growth in aged persons, particularly those households seeking a coastal lifestyle. However, in turn, this pattern has implications for the demand of services, particularly health care.
- The overall outlook is positive for the Greater Taree LGA. Its strategic location (being located in between the major centres of Newcastle and Port Macquarie)

and unfolding demographic drivers are expected to support higher order employment growth. However, the outlook for ‘traditional’ industries is less favourable.

- As evidenced by a reduction in the number of 20-49 persons over the five years to 2011 (-865 persons), the main challenge for the Greater Taree LGA (and its businesses) is to attract young workers to the region in order to supplement higher retirement levels in the future.

## 15.5 Employment Land Supply

### 15.5.1 Zoned Urban Employment Land

- Based on zoning layers issued by the Department of Planning and Environment (July 2014), we have obtained the amount of zoned employment land in the Greater Taree LGA.
- The information presented in this section is based on the Greater Taree Local Environmental Plan 2010.
- There are three employment land use categories, including Business, Industrial and Special Purposes.
- Overall, the Greater Taree LGA has 581.2 hectares of zoned employment land.
- It is estimated approximately 42% of this land is zoned for industrial uses, making it the largest employment land user.
- The proportion of land zoned for Business and Special Purposes is quite similar – 28% and 29% respectively.
- Of the six business zones (B1, B2, B3, B4, B5 and B6), there is around 46.8 hectares attributed to B6 Enterprise Corridor, 38.4 hectares to B5 Business Development and 33.5 hectares to B3 Commercial Core.
- The Special Purposes category has 171.4 hectares of zoned urban land.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

**Table 15.8**  
**Zoned Employment Land - Greater Taree LGA**














Classification	Land Use Zone	Area (ha)	%
Business	B1. Neighbourhood Centre	18.4	3%
	B2. Local Centre	13.1	2%
	B3. Commercial Core	33.5	6%
	B4. Mixed Use	13.0	2%
	B5. Business Development	38.4	7%
	B6. Enterprise Corridor	46.8	8%
	<b>Total</b>	<b>163.2</b>	<b>28%</b>
Industrial	IN1. General Industrial	119.5	21%
	IN2. Light Industrial	124.9	21%
	IN4. Working waterfront	2.1	0%
	<b>Total</b>	<b>246.5</b>	<b>42%</b>
Special Uses	SP2. Infrastructure	141.7	24%
	SP3. Tourist	29.7	5%
	<b>Total</b>	<b>171.4</b>	<b>29%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>581.2</b>	<b>100%</b>

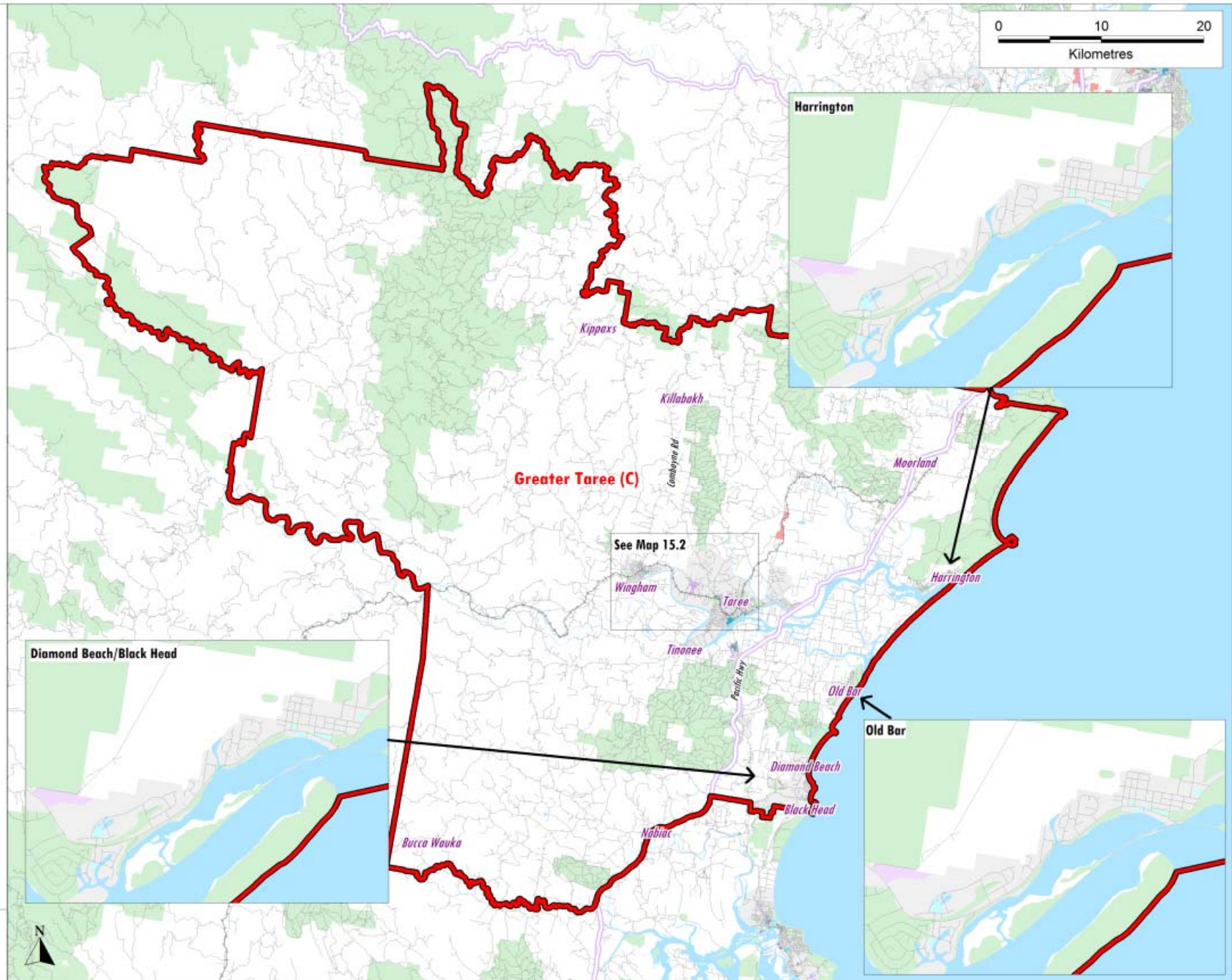
Source: NSW Department of Planning and Environment (2014)

# Map 15.1

## Greater Taree City Council Employment Land Zones

### Legend \*

-  Greater Taree City Council Boundary
  
- Land Zones**
-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





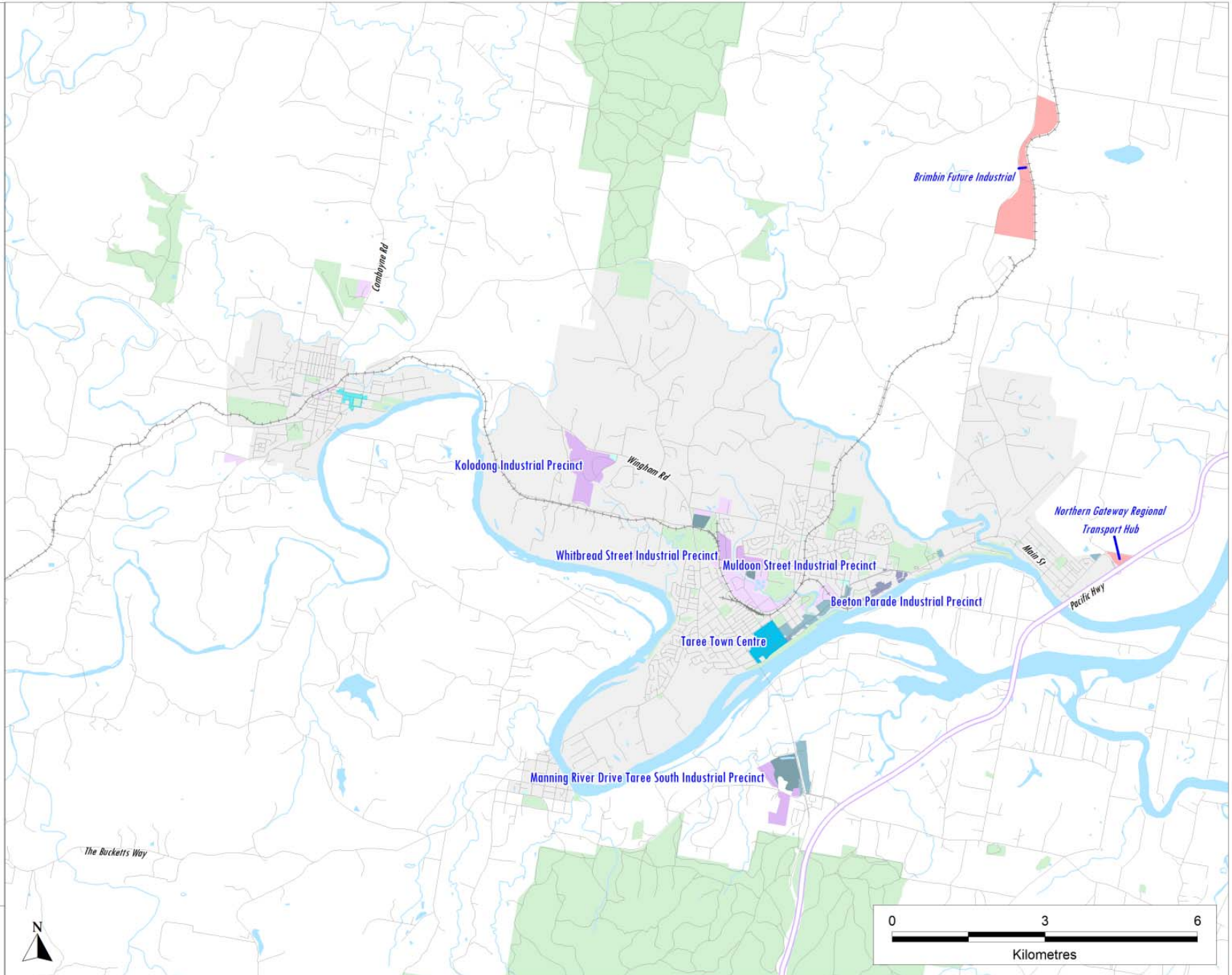
# Map 15.2

## Taree City Employment Land Zones

**Legend \***

**Land Zones**

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



### 15.5.2 Industrial – Existing supply

- Three industrial land use zones are used in the Greater Taree LGA i.e. IN1 General Industrial, IN2 Light Industrial and IN4 Working Waterfront.
- An examination of existing precincts has revealed there are a number of key precincts outlined below.

**Table 15.9**

**Established Industrial Precincts - Greater Taree LGA**

<b>Name</b>	<b>Total Area (hectares)</b>	<b>Developed (hectares)</b>	<b>Developed (%)</b>
Whitbread Street Industrial Precinct	100.0	80.0	80%
Kolodong Industrial Estate	67.0	24.0	36%
Manning River Drive Taree South Industrial Precinct	29.0	18.1	62%
Beeton Parade Industrial Precinct	10.8	8.5	79%
<b>Total</b>	<b>206.8</b>	<b>130.6</b>	<b>63%</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our review include:

- Overall, identified existing precincts occupy 206.8 hectares of zoned land. It is recognised that some of this land is constrained and may not be developed to its full potential.
- The **Whitbread Street Industrial Precinct** is located within the township of Taree. This precinct is centrally located with easy access to the Pacific Highway via Muldoon Street and onto Manning River Drive, providing access through to key regional trade locations along the Pacific Highway. Being so close to the Taree CBD it provides a range of support industries. There is a review currently underway to analyse opportunities to refocus this precinct away from industrial uses towards a mix of commercial and residential, to support the CBD. This location is constrained by flooding which has resulted in many sites remaining residential and unlikely to change in the future. Currently approximately 9.1 hectares remains vacant for future development.

- From a zoned land perspective, the **Kolodong Industrial Estate** is the next largest precinct. Positioned half way between Taree and Wingham, existing uses include motor vehicle repairs, self-storage solutions, engineering business and other businesses that trade to a localised business and residential market. While only 36% of the precinct is developed this precinct has significant ecological constraints that cover 55% of the precinct, significantly reducing future development.
- Given the constraints and existing development in these precincts, of the 206.8 hectares, there is approximately 27.4 hectares of zoned capacity available for future development
- At an average floor space ratio of 0.6:1, approximately 16.4 hectares of industrial floorspace could be delivered through existing zoned industrial land.

### 15.5.3 Industrial – Future supply

- Approximately 184 hectares of future industrial land has been identified.
- The two future precincts are part of the broader Northern Gateway Transport Hub (in Cundletown and Brimbin), which encompasses five distinctive components, featuring a heavy vehicle interchange terminal and transport/logistics warehouses.
- Situated less than 3km from the Taree Regional Airport and strategically on the transport corridor between Sydney and Brisbane (i.e. 3.5 hours from Sydney and 7.5 hours from Brisbane), the proposed hub is well positioned to capitalise from higher transport and distribution volumes and recent Pacific Highway upgrades – as reflected in employment projections for the Greater Taree.
- A summary of land areas and potential delivery times is presented below.



**Table 15.10****Future Industrial Precincts - Greater Taree LGA**

<b>Name</b>	<b>Total Area (hectares)</b>	<b>Timing (Year)</b>
Brimbin Urban Release Area	112.0	10 - 20
Northern Gateway Transport Hub	72.0	10 - 20
<b>Total</b>	<b>184.0</b>	

*Source: MacroPlan Dimasi*

#### 15.5.4 Retail & Commercial – Existing supply

The Greater Taree LGA contains a resident population of approximately 48,900 persons, in addition to tourism visitation which equates to an equivalent year-round population of about 2,400 persons (equivalent to about 5% of the resident population).

A population of this scale (including tourists), means that the Greater Taree LGA supports a decent retail/commercial centres hierarchy, with the majority of retail/commercial floorspace provided in the Taree Major Regional Centre. However, there would be considerable leakage for higher order retail shopping to Port Macquarie, and south towards Newcastle/Hunter.

#### Existing retail/commercial hierarchy

The Greater Taree LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 15.3 and Map 15.4.

- The Greater Taree LGA centres hierarchy generally consists of the following structure – as defined in the MNCRS:
  - Taree Major Regional Centre.
  - Old Bar Town Centre and Wingham Town Centre.
  - Inland and coastal villages (such as Harrington, Landsdowne, Cooperbrook and Hallidays Point)

### **Taree Major Regional Centre**

- The Taree Major Regional Centre is the main commercial, retail and administrative hub within the Greater Taree LGA. It is designated as one of four Major Regional Centres in the Mid North Coast Region
- The majority of the business zoned land (92.1 ha) within the LGA is located within the Taree Major regional centre, including 5.8 ha of B1 zoned land and all 33.5 ha of B3 zoned land, as well as B5 and B6 zoned land.
- The Taree Major Regional Centre includes:
  - The traditional shopping strip along Victoria and Manning Streets which extends its influence toward Commerce and Macquarie Streets. IGA and Aldi supermarkets are located in this precinct
  - Manning Mall – an enclosed Target/Coles anchored centre
  - Taree Central – an enclosed Big W/Woolworths anchored centre

### **Town Centres**

- The Old Bar Town Centre is centred on the traditional shopping strip along Old Bar Road and includes a Coles supermarket
- The Wingham Town Centre is located on Isabella and Bent Street; a traditional shopping strip with a range of retail and businesses. The Stones Corner Shopping Centre at the western end is anchored by a Coles supermarket.

### **Other centres/villages**

There are a number of small village centres distributed elsewhere across the LGA, generally serving the convenience needs of the immediate surrounding populations in these areas. These centres might provide a small range retail/commercial facilities, a small general store and or very limited retail. Some of the larger centres include supermarkets, such as Harrington (1,770 sq.m Supa IGA).

# Map 15.3

## Greater Taree City Council Retail Provision

### Legend \*

Greater Taree City Council Boundary

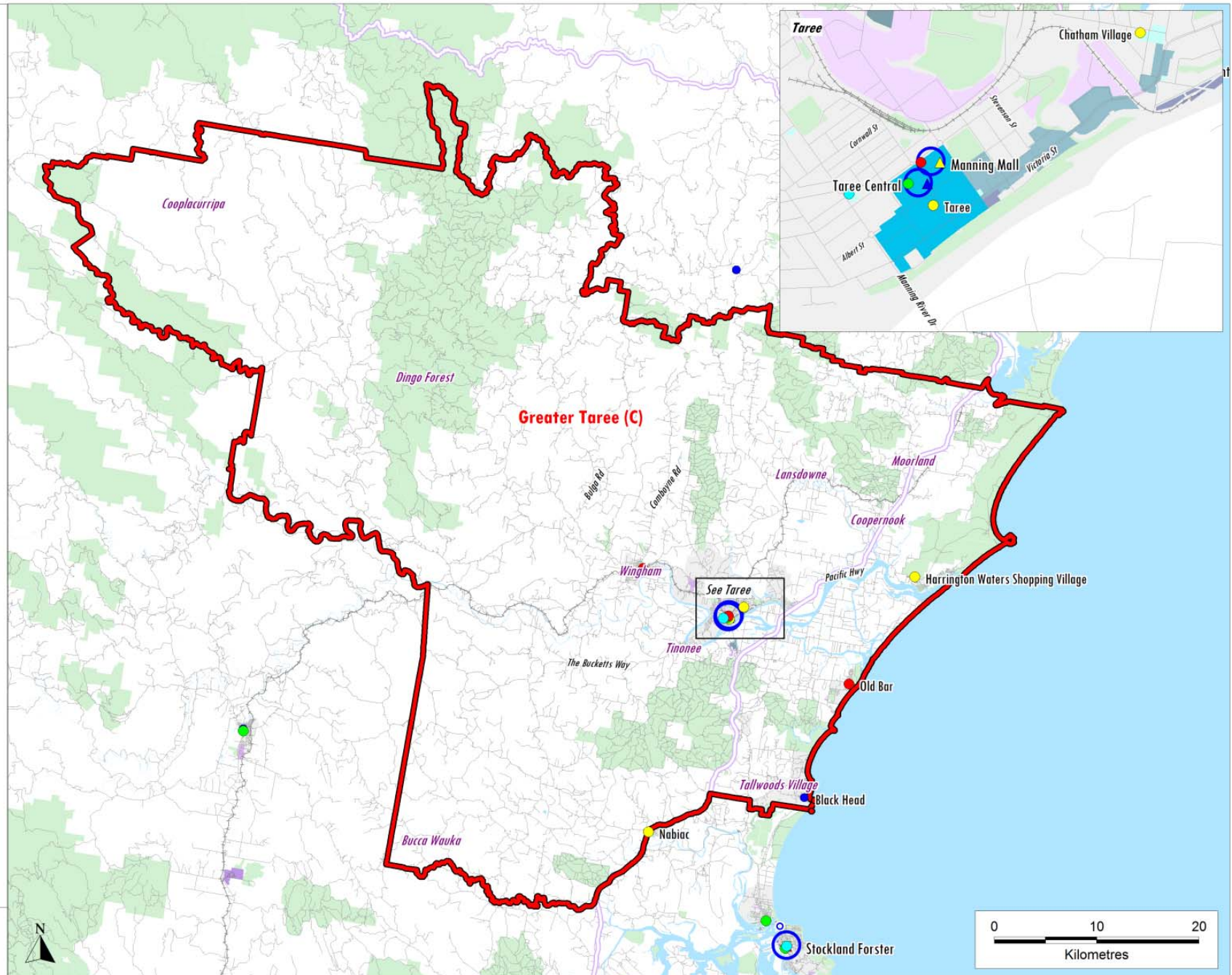
### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4

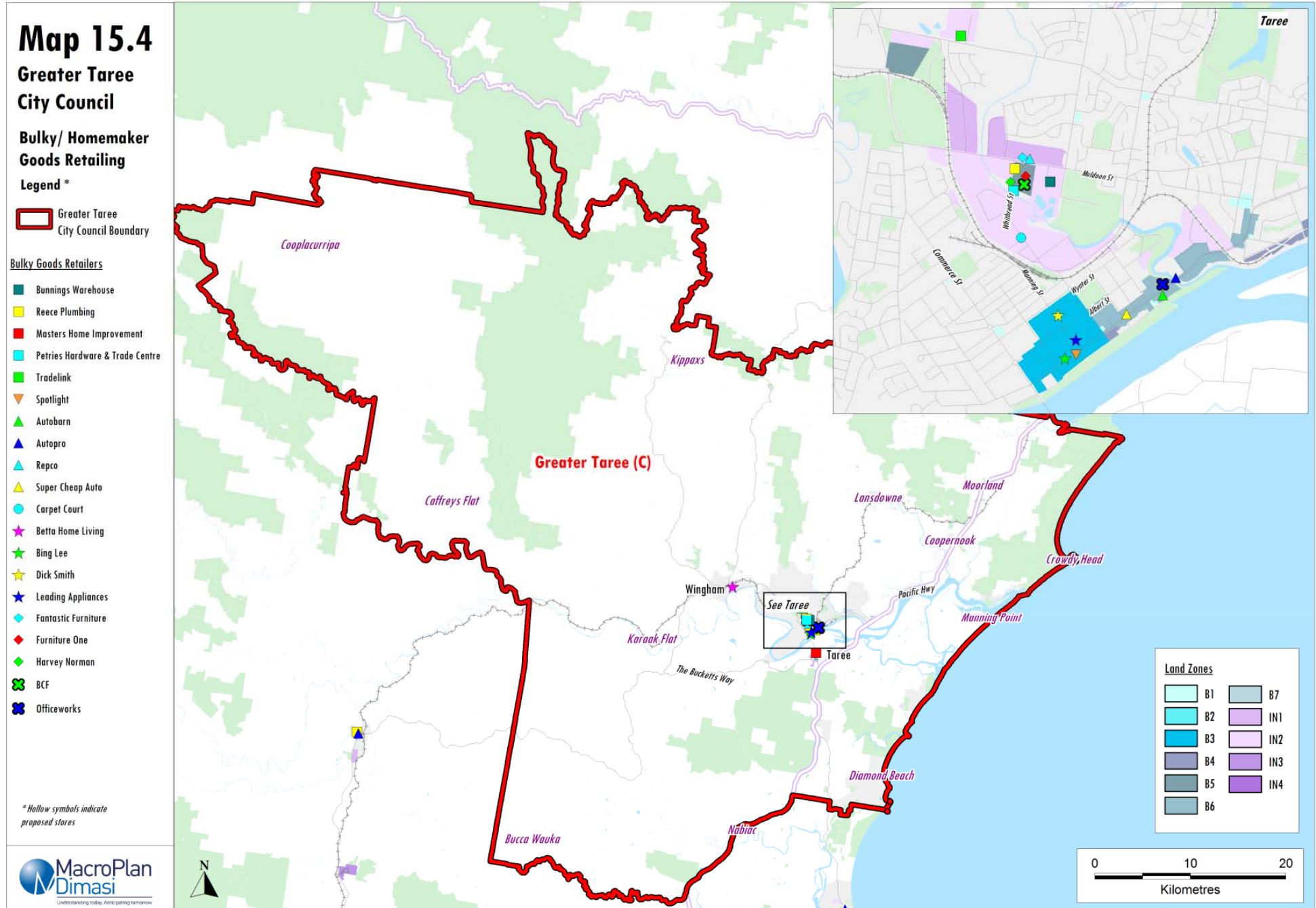
### Retail Competition

- Sub-Regional Centre
- Big W
- Target
- Woolworths
- Coles
- Aldi
- Supa IGA / IGA
- Other Smkt (inc. Foodworks, IGA Express etc.)
- Potential Smkt

\* Hollow symbols indicate proposed stores







### **Business zoned land capacity for retail and commercial floorspace**

Table 15.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is **163.2 hectares of business zoned land** within the Greater Taree LGA, of which 18.4 ha is B1 zoned land, 13.1 ha is B2 zoned land and 33.5 ha is B3 zoned land. All of the B3 zoned land is located in the Taree Major Regional Centre.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is about 38.5 ha of B5 zoned land, which generally accommodates bulky goods retail, although such uses were historically located in other zones, and in some circumstances, within industrial zoned precincts.
- There is also 13.0 ha of B4 zoned land and 46.8 ha of B6 zoned land within the LGA.
- We have applied FSRs for each business zone type from the Greater Taree LEP 2010 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Greater Taree LGA to be in the order of 1,863,673 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 15%, given the relative size and mix of the retail offer compared with Port Macquarie, and the reasonable proximity to Forster/Newcastle/Hunter. We have then compared the estimated 'net retail demand' now, and in 2031, with the available business zoned capacity to accommodate retail floorspace, to gain an understanding of the ability and capacity of the zoned business land stock to meet future demand.

**Table 15.11**  
**Greater Taree LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<b>By Zone</b>			
Total B1	18.4	0.5	91,845
Total B2	13.1	0.5	64,387
Total B3	33.5	1.9	630,163
Total B4	13.0	1.8	229,721
Total B5	38.4	1.0	383,876
Total B6	<u>46.8</u>	<u>1.0</u>	<u>463,680</u>
<b>Total LGA</b>	<b>163.2</b>		<b>1,863,673</b>

*Source: MapInfo; NSW Govt; MacroPlan Dimasi*

### 15.5.5 Retail & Commercial – Future supply

A review of the employment zones is underway examining the role of the business zones and the function of the Taree CBD.

### 15.5.6 Special Purposes – Existing supply

- As prescribed in the Greater Taree LEP 2010, there are two land use zones within the category Special Use; SP2 Infrastructure and SP3 Tourist.
- Water supply systems, classified roads, airstrips and sewerage systems have been removed from our estimates of urban employment land for this zoning category.
- Accounting for the majority of this allocation, the SP2 Infrastructure category includes 115 hectares for an air transport facility (i.e. Taree Regional Airport). Of the 115 hectares, 7.5 hectares is used for ancillary purposes. Additionally, there is 16 hectares of SP2 land assigned to an educational establishment (i.e. Taree TAFE campus) and 9.6 hectares for health service facilities (i.e. Mayo Private Hospital).

Table 15.12

## Identified Special Use Sites - Greater Taree LGA

Name	Total Area (hectares)
Taree Regional Airport	115.0
Taree TAFE campus	16.0
Mayo Private Hospital	7.1
Manning Base Hospital	2.5
<b>Total</b>	<b>140.6</b>

Source: MacroPlan Dimasi

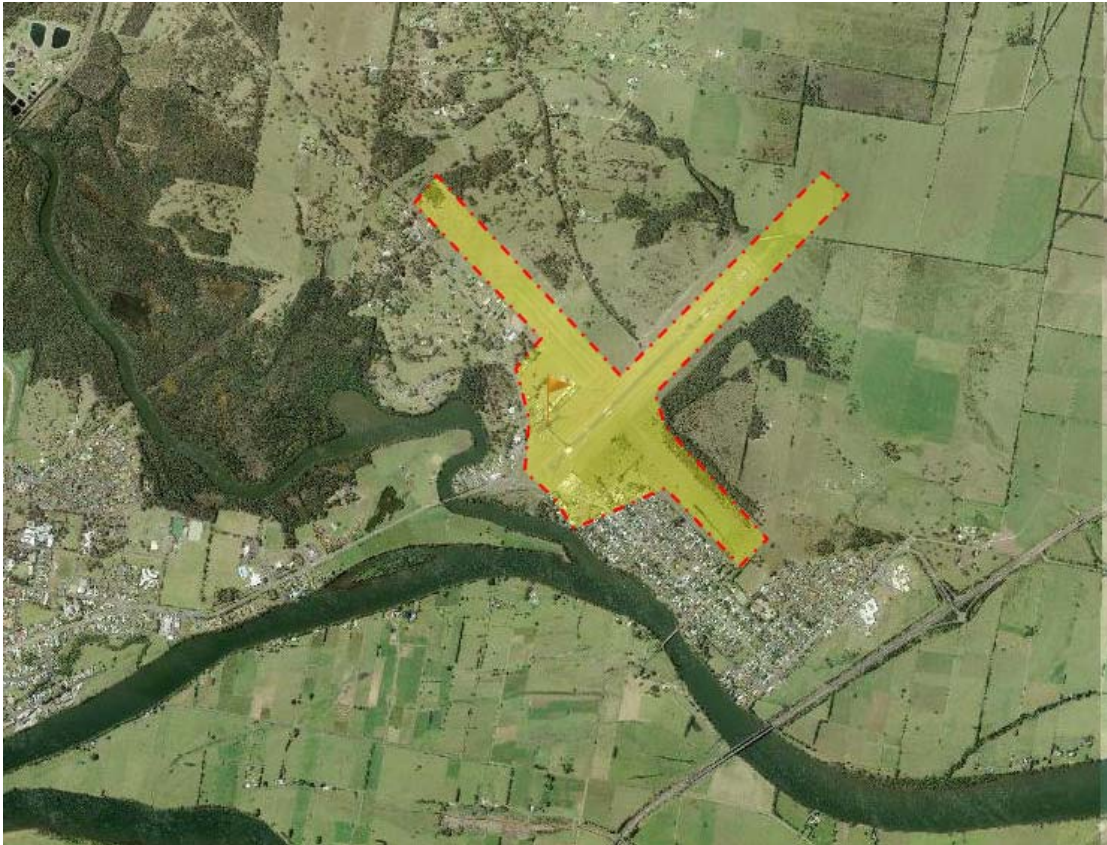
- There are two hospitals located on Special Purpose zoned land being the Mayo Private Hospital (7.1 hectares) and the Manning Rural Referral Hospital (2.5 hectares).
- The Mayo Private Hospital offers a number of surgical, medical, rehabilitation and allied health services as well as an inpatient mental health unit. The site is constrained, providing approximately 2.8 hectares of land for future development. It is co-located with other health service provision and facilities e.g. Community Health Centre, Public Dental Clinic and Drug and Alcohol Service Unit.
- The Manning Rural Referral Hospital (Base Hospital) provides a broad range of specialist services including surgery, day surgery, obstetrics, paediatrics, emergency services, oncology and others.
- It is co-located with other health service provision and facilities e.g. Community Health Centre, Public Dental Clinic and Drug and Alcohol Service Unit.
- The Taree Regional Airport is located approximately 5-6km northeast of the city of Taree. Positioned on Lansdowne Road, access to Pacific Highway is granted through Main and Princess Streets. Passenger travel is currently serviced by one carrier, Regional Express (Rex). Current uses on the airport



site include small aircraft manufacturers, car hire operators (Hertz and Thrifty), aircraft restorer and a skydiving school.

- The Taree TAFE Campus is constrained by flooding, resulting in 6.4 of the total 16 hectares available for development.

**Figure 5. Satellite Image of Taree Regional Airport**



*Source: SIX maps (NSW Department of Planning and Environment)*

- In addition, there is 29.74 hectares of land zoned for tourism purposes (SP3), consisting of:
  - An undeveloped tract of land along the Manning River to the south of Cabbage Tree Island
  - A parcel of land in Diamond Beach, entailing a cluster of accommodation and tourist facilities i.e. Ramada Resort Diamond Beach, Endota Spa, Seashells Beachfront Resort, Diamond Beach Resort, the '3 Nippers' restaurant



### 15.5.7 Special Purposes – Future supply

- Stage 1 of the \$2.4 million Taree Aviation Business Park (at the Taree Regional Airport) is underway. Located adjacent to the proposed Northern Gateway Transport Hub, the first stage is anticipated to include 16 individual lots, and the second release, five lots.

**Figure 6. Artist's Impression of Taree Aviation Business Park**



Source: NBN News (2014)

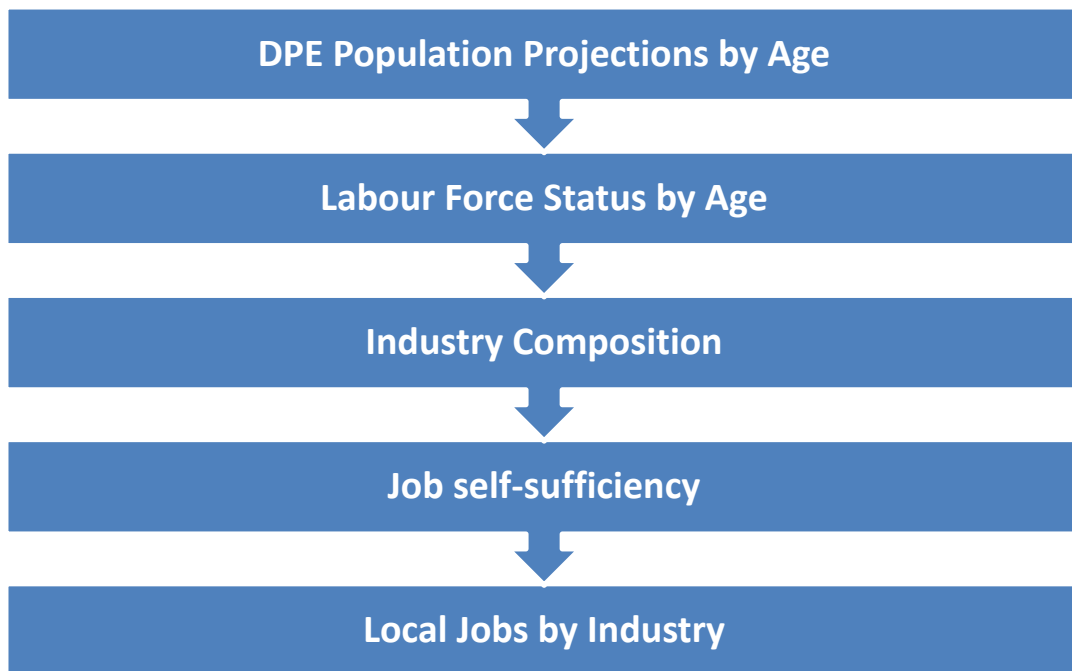
- Additionally, \$6 million has been allocated for a new multi-purpose education centre in Taree for medical and allied health students to complete clinical training. It is to be located on the grounds of Manning Base Hospital.

## 15.6 Demand for employment land

### 15.6.1 Methodology

- In order to ascertain the quantum of commercial, industrial and special purpose land required in the Greater Taree LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of the industry in Greater Taree LGA to deliver employment.

- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Greater Taree LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  1. Converting jobs by industry into specific built form types
  2. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 15.6.2 Employment Projections

- In contrast to the outright decline observed during the 2006-2011 period (-70 jobs), employment growth is expected to resume in the Greater Taree LGA.
- Underscored by an ageing demographic and investment in logistics, warehousing and transport infrastructure, the Greater Taree LGA workforce is expected to expand by an additional 589 jobs over the forecast period (i.e. 2011 to 2031).
- Over the ten years to 2021, our projections for the Greater Taree LGA imply an increase of around 289 jobs. As at 2021, the LGA is projected to support 14,272 jobs.
- By 2031, employment in the LGA is expected to increase further to 14,573, which represents growth of 301 jobs since 2021.
- At an average growth rate of 29 jobs per annum, the projected rate of employment growth is above that observed between 2006 and 2011 (average of -14 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+264), Accommodation and Food Services (+155), Education and Training (+150) and Retail Trade (+102).
- Six industries are expected to incur outright declines, with the greatest contractions occurring in traditional industries such as Manufacturing (-192), and Agriculture, Forestry and Fishing (-128).

**Table 15.13**  
**Employment by Industry - Greater Taree LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	2,699	2,861	2,963	264
Accommodation and Food Services	1,089	1,187	1,244	155
Education and Training	1,270	1,362	1,420	150
Retail Trade	2,090	2,133	2,192	102
Professional, Scientific and Technical Services	495	527	581	86
Construction	721	724	797	76
Transport, Postal and Warehousing	503	553	578	75
Rental, Hiring and Real Estate Services	216	219	282	66
Electricity, Gas, Water and Waste Services	206	227	260	54
Wholesale Trade	423	439	468	45
Financial and Insurance Services	229	253	258	29
Administrative and Support Services	382	392	400	18
Mining	40	41	56	16
Other Services	541	531	528	-13
Information Media and Telecommunications	135	119	121	-14
Arts and Recreation Services	179	187	162	-17
Public Administration and Safety	584	574	513	-71
Other*	119	19	5	-114
Agriculture, Forestry and Fishing	679	612	551	-128
Manufacturing	1,384	1,311	1,192	-192
<b>Total</b>	<b>13,984</b>	<b>14,273</b>	<b>14,573</b>	<b>589</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 15.14**  
Industry and Land Use Conversion Matrix - Greater Taree LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	60%	0%	40%	100%
Health Care and Social Assistance	0%	60%	0%	40%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the following table.

**Table 15.15**  
Employment Additions by Land Use Type - Greater Taree LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	0	2	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	2	3	19	30	0	0
Construction	0	7	2	66	0	0
Wholesale Trade	13	23	3	6	0	0
Retail Trade	41	56	2	3	0	0
Accommodation and Food Services	69	40	29	17	0	0
Transport, Postal and Warehousing	10	5	40	20	0	0
Information Media and Telecommunications	0	2	0	0	0	0
Financial and Insurance Services	24	5	0	0	0	0
Rental, Hiring and Real Estate Services	3	63	0	0	0	0
Professional, Scientific and Technical Services	32	54	0	0	0	0
Administrative and Support Services	10	8	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	55	35	0	0	37	23
Health Care and Social Assistance	97	61	0	0	65	41
Arts and Recreation Services	8	0	0	0	0	0
Other Services	0	0	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

Table 15.16

## Indicative Employment Density by Industry and Land Use Type - Greater Taree LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

### 15.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of correlation between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Greater Taree (presented in Table 15.17).
- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative

employment density for that particular industry). Results for this scenario are presented in Table 15.17.

**Table 15.17**  
Additional Floorspace by Industry under the Base Scenario (sqm) - Greater Taree LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	20	310	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	80	140	4,640	7,600	0	0
Construction	10	220	350	9,870	0	0
Wholesale Trade	390	680	650	1,130	0	0
Retail Trade	1,650	2,250	300	410	0	0
Accommodation and Food Services	3,430	1,990	4,420	2,560	0	0
Transport, Postal and Warehousing	300	150	8,030	3,930	0	0
Information Media and Telecommunications	0	70	0	0	0	0
Financial and Insurance Services	600	130	0	0	0	0
Rental, Hiring and Real Estate Services	90	1,570	0	0	0	0
Professional, Scientific and Technical Services	800	1,360	0	0	0	0
Administrative and Support Services	240	200	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	2,220	1,380	0	0	1,850	1,150
Health Care and Social Assistance	3,890	2,450	0	0	3,890	2,450
Arts and Recreation Services	330	0	0	0	0	0
Other Services	0	0	0	0	0	0
<b>Total</b>	<b>14,030</b>	<b>12,590</b>	<b>18,410</b>	<b>25,810</b>	<b>5,740</b>	<b>3,600</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **14,030 sq.m of commercial, 18,410 sq.m of industrial and 5,740 sq.m of special purpose** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **12,590 sq.m of commercial, 25,810 sq.m of industrial and 3,600 sq.m of special purpose** floorspace is expected to materialise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 15.18.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 15.18**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Greater Taree LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	10	230	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	60	100	3,480	5,700	0	0
Construction	10	160	270	7,400	0	0
Wholesale Trade	290	510	490	850	0	0
Retail Trade	1,230	1,690	230	310	0	0
Accommodation and Food Services	2,580	1,490	3,310	1,920	0	0
Transport, Postal and Warehousing	230	110	6,020	2,950	0	0
Information Media and Telecommunications	0	50	0	0	0	0
Financial and Insurance Services	450	100	0	0	0	0
Rental, Hiring and Real Estate Services	60	1,180	0	0	0	0
Professional, Scientific and Technical Services	600	1,020	0	0	0	0
Administrative and Support Services	180	150	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	1,660	1,040	0	0	1,390	860
Health Care and Social Assistance	2,920	1,840	0	0	2,920	1,840
Arts and Recreation Services	250	0	0	0	0	0
Other Services	0	0	0	0	0	0
<b>Total</b>	<b>10,520</b>	<b>9,440</b>	<b>13,810</b>	<b>19,360</b>	<b>4,310</b>	<b>2,700</b>

Source: MacroPlan Dimasi

- Under the Alternative scenario, it is estimated **10,520 sq.m of commercial**, **13,810 sq.m of industrial** and **4,310 sq.m of special purpose** floorspace will be required by 2021.
- Over the ten years to 2031, an additional **9,440 sq.m of commercial**, **19,360 sq.m of industrial** and **2,700 sq.m of special purpose** floorspace is expected to eventuate.



#### 15.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Greater Taree LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B1 Neighbourhood Centre 1:1
  - B4 Mixed Use 1.0-3.0:1 and
  - B5 Business Development 1:1
  - IN1 General Industrial 1:1
  - IN2 Light Industrial 1:1
  - IN4 Working Waterfront 1:1
- As such, a FSR of 1:1 has been applied across all business zones, 1:1 for industrial uses and 0.8:1 for Special Purposes (based on the North Coast average).
- Based on floorspace projections and average observed floor space ratios, MacroPlan Dimasi estimates around **2.0–2.7 hectares of commercial**, **3.3–4.4 hectares of industrial** and **0.9–1.2 hectares of special purposes** land will be required by 2031.

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	2.0 - 2.7	1.0	2.0 - 2.7
Industrial	3.3 - 4.4	1.0	3.3 - 4.4
Special Uses	0.7 - 0.9	0.8	0.9 - 1.2

*Source: MacroPlan Dimasi*

### 15.6.5 Demand for retail floorspace

The potential drivers of future demand for retail floorspace in the Greater Taree LGA are summarised below:

- Population growth – which is expected to be weak, growing at an average of 0.4% per annum to 2031 (a net increase of 7.9% or 3,800 people).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.8% per annum.
- Tourism visitation – which is assumed to grow at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 15.20 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Greater Taree LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 15.20 shows the following:

- The residential population of the Greater Taree LGA generates approximately **95,800 sq.m** of retail floorspace demand (at 2014), which is equivalent to a provision rate of about **2.0 sq.m per capita**.
- Total residential retail floorspace demand is estimated to grow by about **20,730 sq.m** by 2031, an increase of about **21%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to about **4,700 sq.m**, and is expected to increase by about **1,010 sq.m** by 2031.
- Total retail demand growth equates to an equivalent land requirement of **4.3 hectares**, assuming an average floorspace ratio (FSR) of 0.5.

**Table 15.20**  
**Greater Taree LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\***

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	48,910	49,450	50,550	51,400	51,900	0.3%
Tourism equiv. pop	2,384	2,410	2,463	2,505	2,529	0.3%
<b>Retail exp. (\$M)</b>						
Food & liquor	271	278	297	317	336	1.3%
Food catering	63	65	70	76	82	1.5%
Apparel	47	48	50	52	53	0.8%
Household	98	100	104	108	111	0.8%
Leisure	27	28	29	31	32	1.0%
General	46	47	51	54	58	1.4%
Retail services	<u>15</u>	<u>16</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>1.0%</u>
<b>Total</b>	<b>568</b>	<b>581</b>	<b>617</b>	<b>655</b>	<b>691</b>	<b>1.2%</b>
<b>Category RTD (\$/sq.m)</b>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<b>Floorspace demand (sq.m)</b>						
Food & liquor	30,149	30,942	33,015	35,214	37,304	1.3%
Food catering	10,539	10,870	11,743	12,681	13,600	1.5%
Apparel	8,532	8,670	9,024	9,389	9,702	0.8%
Household	32,672	33,199	34,554	35,952	37,152	0.8%
Leisure	4,548	4,645	4,895	5,157	5,395	1.0%
General	7,610	7,833	8,420	9,048	9,657	1.4%
Retail services	<u>2,544</u>	<u>2,598</u>	<u>2,738</u>	<u>2,884</u>	<u>3,018</u>	<u>1.0%</u>
<b>Total</b>	<b>95,761</b>	<b>98,072</b>	<b>104,107</b>	<b>110,489</b>	<b>116,483</b>	<b>1.4%</b>
<b>Floorspace per capita</b>	<b>1.96</b>	<b>1.98</b>	<b>2.06</b>	<b>2.15</b>	<b>2.24</b>	<b>0.8%</b>
<b>Tourism demand</b>						
Equiv. tourism pop.	2,384	2,410	2,463	2,505	2,529	0.3%
Floorspace per capita	<u>1.96</u>	<u>1.98</u>	<u>2.06</u>	<u>2.15</u>	<u>2.24</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>4,667</b>	<b>4,779</b>	<b>5,074</b>	<b>5,385</b>	<b>5,677</b>	<b>1.2%</b>
<b>Total retail demand (sq.m)</b>	<b>100,427</b>	<b>102,852</b>	<b>109,180</b>	<b>115,873</b>	<b>122,160</b>	<b>1.2%</b>
<b>Demand growth (14-31)</b>					<b>21,732</b>	
<b>Estimated land take (ha)</b>					<b>4.3</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 15.7 Market Gap

MacroPlan Dimasi has undertaken a market ‘gap’ analysis of employment land for the Greater Taree LGA. The market position has been derived considering the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Greater Taree LGA.

Key findings pertaining to our gap assessment are presented in Table 15.21

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	163.2	32.6	0.0	32.6	6.6	26.0
Industrial	246.5	27.4	184.0	211.4	3.9	207.5
Special Uses	171.4	21.5	0.0	21.5	1.0	20.5

Source: MacroPlan Dimasi

- Overall, there is sufficient land available to accommodate future employment needs of the Greater Taree LGA out to 2031.
- Specifically, it is estimated:
  - *Supply of business land will exceed demand by 26.0 hectares*
  - *Supply of industrial land will exceed demand by 207.5 hectares*
  - *Supply of special purposes land will exceed demand by 20.5 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Greater Taree LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in the Greater Taree LGA, particularly for new and emerging industries.

## 15.8 Conclusions

### 15.8.1 Commercial, Industrial and Special Purposes

To date, population growth has been one of the key drivers of economic development within the Greater Taree LGA. Over the five years to 2011, the resident population of the LGA increased by 1,966 persons – at an average rate of 0.8% per annum.

In line with other LGAs in the region, persons aged 50+ accounted for the majority of population growth over the five year period to 2011. The 50-64 and 65+ age cohorts increased by 1,163 and 1,963 persons respectively. The solid population growth in aged persons, particularly those households seeking a coastal lifestyle has had implications on the quantity and quality of services, particularly health care.

Over the five years to 2011, employment growth was most pronounced amongst service industries. Over this period, jobs growth was dominated by Health Care and Social Assistance (+490), Accommodation and Food Services (+105) and Education and Training (+94).

Conversely, a contraction in employment was observed in thirteen industries. The shedding of jobs was greatest within traditional 'value add' industries - Manufacturing, Agriculture, Forestry and Fishing and Construction industries shed 668 jobs over the five years to 2011.

Underscored by an ageing demographic and significant capital investment on logistics, warehousing and transport infrastructure, the Greater Taree LGA workforce is expected to expand by an additional 583 jobs over the forecast period (i.e. 2011 to 2031).

Key investment, economic and demographic drivers which are expected to influence the Greater Taree LGA include:

- DP&E projections suggest population growth will ease from current levels, from 0.8% to 0.4% per annum. At the same time, the LGA's population growth is expected to primarily come from persons aged 65+.
- The two future precincts are part of the broader Northern Gateway Regional Transport Hub (in Cundletown), which encompasses five distinctive components, featuring a heavy vehicle interchange terminal and transport/logistics warehouses.
- Positioned strategically on the transport corridor between Sydney and Brisbane (i.e. 3.5 hours from Sydney and 7.5 hours from Brisbane) and proximate to the Taree Regional Airport, the Northern Gateway Transport Hub and the Taree Aviation Business Park are well positioned to capitalise from higher transport and distribution volumes and recent Pacific Highway upgrades.

These drivers are implied in our employment projections:

- Increased demand for localised health and social services
- Increased demand for population driven industries - Education and Training, Professional, Scientific and Technical Services, Retail Trade and Construction industries.
- Growth in Transport, Postal and Warehousing and Wholesale employment.

Our demand projections indicate **19,960–26,620 sq.m of commercial, 21,732 sq.m of retail, 33,170–44,220 sq.m of industrial and 7,010–9,340 sq.m of special purposes of floorspace will be required by 2031.**

Based on floorspace demand projections and average observed floor space ratios, MacroPlan Dimasi estimates around **2.0–2.7 hectares of commercial, 4.3 hectares of retail, 3.3–4.4 hectares of industrial and 0.9–1.2 hectares of special purposes** land will be required by 2031.

Overall, there is sufficient land available to accommodate the future employment needs of the Greater Taree LGA (out to 2031). It is estimated:

- *Supply of business land will exceed demand by 26.0 hectares*
- *Supply of industrial land will exceed demand by 207.5 hectares*
- *Supply of special purposes land will exceed demand by 20.5 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Greater Taree LGA.

Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in the Greater Taree LGA, particularly for new and emerging businesses and industries.

### **15.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Greater Taree LGA:

- The Taree Major Regional Centre provides a decent range of retail and commercial facilities serving the residents of Greater Taree, and limited visitor numbers to the region, including two sub-regional shopping centres, being Manning Mall, which is anchored by a large Coles supermarket and Target discount department store, and Taree Central, which is anchored by a Big W discount department store and large Woolworths supermarket. The provision of retail and commercial floorspace in surrounding towns/villages is limited, due to the small localised populations in these areas. The majority of the population is located in the Taree urban area.



- Future population growth is expected to be low, averaging about 0.4% per annum over the period to 2031, an increase of about 7.9% on current levels, or an additional 3,800 persons.
- Broadly, future population growth (and tourism growth) translates to retail floorspace demand growth equivalent to about 21,730 sq.m (a 21.6% uplift) by 2031, equating to a land requirement of about 4.3 ha.
- We expect that there is currently leakage to higher order retail facilities provided at Port Macquarie and Newcastle, and that there will continue to be a net leakage of demand beyond the LGA in the future.
- Existing retail demand is estimated at 100,400 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 1,863,673 sq.m. By 2031, estimated retail demand is estimated to be about 122,160 sq.m. However we estimate leakage of about 15% beyond the LGA to centres such as Port Macquarie and Newcastle, resulting in net demand of about 85,400 sq.m, increasing to 103,840 sq.m by 2031.
- There are no **regional shopping centres** within Greater Taree (there are sub-regional shopping centres), and by 2031, the population will still be of a scale not sufficient to be realistically considered for regional shopping centre scale facilities. This is not to say that new retail formats/concepts may not seek to enter the Greater Taree market in the future, and the planning system should be flexible enough to allow such uses to be considered in the context of their net community benefits.
- Greater Taree does not have any specific retail/commercial strategies guiding future development, although the LEP 2010 outlines the objectives of the B3 zone (which is only within the Taree Major Regional Centre) is to reinforce the Taree CBD as the major regional centre, and development in other zones (e.g. B2) is to support the Taree CBD.
- Our preliminary analysis tends to indicate that the existing business land stock will generally **be sufficient to support the future retail demand growth across the LGA.**

- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 16: LGA Analysis - Gloucester

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Gloucester LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Gloucester LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Gloucester LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from DP&E and Gloucester Shire Council.

### 16.1 Key facts, findings and take-outs

#### 16.1.1 Population growth

- Over the five years to 2011, the resident population of Gloucester LGA expanded by just 112 persons – at an average rate of 0.5% per annum.
- By age, persons aged 50-64 and 65+ experienced the greatest increase over the five years to 2011 – increasing by 66 and 207 respectively. In contrast, the

0-19 and 35-49 (traditional 'family' cohorts) age cohorts experienced an outright decline over this period.

- Between 2006 and 2011, net migration to Gloucester LGA totalled 154 persons. Persons who previously lived in Sydney accounted for the largest proportion of the net migration gain (243 persons).
- DPE projections suggest the resident population of Gloucester LGA will decrease, from 5,000 in 2011 to 4,850 persons in 2031.

### 16.1.2 Employment trends

- As at 2011, the Gloucester LGA supported 1,807 jobs – just 1% of the North Coast workforce.
- The Agriculture, Forestry and Fishing industry (17.1%) is the largest employing industry, with 309 jobs as at 2011.
- Between 2006 and 2011, 70 new jobs were created in Gloucester LGA.
- The Mining, Construction and Accommodation and Food Services industries both incurred modest gains, increasing by 54, 31 and 25 jobs added respectively.
- Nine industries registered job losses, with the greatest loss occurring within the Manufacturing industry (-45 jobs).
- Approximately 14 industries exhibited a change of 20 or less jobs over the five year period to 2011 – consistent with a small workforce.

### 16.1.3 Employment land

- In Gloucester LGA, there are 294 hectares of land zoned for urban employment purposes – comprising of 7% Business, 92% Industrial and 1% Special Uses.
- Following 70 job additions during the 2006 and 2011 period, employment in the Gloucester LGA is projected to increase over the forecast period. Between 2011 and 2031, it is expected the workforce will expand by 112 jobs.

- Our demand projections indicate **2,630-3,560 sq.m of commercial, 1,304 sq.m of retail, 3,890–5,170 sq.m of industrial** and **870-1,150 sq.m of special use** of floorspace will be required by 2031.
- Based on derived floorspace requirements and average floor space ratios, MacroPlan Dimasi estimates around **0.2 hectares of commercial, 0.3 hectares of retail, 0.6–0.9 hectares of industrial** and **0.1 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available to accommodate future employment needs over the forecast period. Over the forecast period it is estimated:
  - *Supply of business land will exceed demand by 11.7 hectares*
  - *Supply of industrial land will exceed demand by 200.2 hectares*
  - *Supply of special uses land will exceed demand by 1.8 hectares*
- Local environmental and general development constraints such as flooding, topography and the cost of delivering services may reduce the quantum of land available for future development in the Gloucester LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Gloucester LGA.

## 16.2 Literature review

Gloucester Council has prepared numerous relevant documents that relate to employment lands across the LGA. The Economic Development Strategy 2010 (EDS) focuses on strategies and actions required to realise opportunities for the Shire in the current industries and emerging sectors. The Development and Employment Land and Commercial/Retail Strategy 2006 (DELCRS) provides a detailed assessment of retail and commercial lands and outlines the amount of floorspace required between 2005 and 2021.

We note the following key points:

- According to the DELCRS, as at August 2005, bulky goods retailers, or stores retailing furniture, furnishings and whitegoods were provided over four establishments, with a total floor area of approximately 3,220 sq.m GLA.
- As at August 2005, the Gloucester Town Centre has approximately 20,770 sq.m gross leasable area (GLA) of retail, commercial and services floor space. This is comprised of some 13,700 sq.m GLA of retail goods and services floor space (termed shopfront floor space) and a further 7,070 sq.m GLA of commercial, professional, community and trade services floor space.
- The DELCRS states by 2021 the Gloucester Town Centre's retail and services floor space requirements are predicted to be approximately 26,750 sq.m GLA, likely to be comprised of approximately 17,690 sq.m GLA of shopfront floor space and some 9,060 sq.m of commercial, professional, community and trade services floor space
- A total net additional requirement of approximately 5,980 sq.m GLA is predicted for all retail, commercial and services floor space over the period 2005-2021 as under the DELCRS.

The EDS (2010) provides the following key points:

- The objectives of the strategy are: to increase the population of the Shire; to maintain local services; to diversify and strengthen the local economy; and to increase the number and range of local jobs.
- There has been a decline in the number of businesses, with most of the decline being accounted for by two sectors – agriculture; and accommodation, cafes and restaurants.
- Projected growth in spending would create additional space requirements of 5,980 sq.m GLA for all retail, commercial and services floor space (3,990 sq.m shopfront and 1,990 sq.m for additional commercial, professional, community and trade services).

- The predicted long term requirement of total floorspace at 2021 is estimated to be some 26,750 sq.m GLA (17,690 sq.m GLA of shop-front floor space and some 9,060 sq.m of commercial, professional, community and trade services floor space).
- The key town infrastructure to assist development are: the development of a multi-purpose Gateway Centre as an active tourism and community hub; the provision of industrial land for light industrial and support activities adjacent to the town; and consideration of the role of Section 94 contributions in relation to strategic development projects.
- The potential future major developments for the area include new mines, the AGL Gas Project and the development of the Stratford Industrial Park. Gloucester Coal Seam Gas project also involves the introduction of coal seam gas in the LGA.
- Stratford Industrial Park is proposed to be an industrial/energy park, benefiting industries that thrive on access to gas, electricity, steam, water and rail.
- Key infrastructure to assist development include; the development of a multi-purpose Gateway Centre as an active tourism and community hub and provision of light industrial land near the town and additional aged care services.

## **16.3 Socio-demographic trends**

### **16.3.1 Population change**

- According to ABS ERP figures, the population of the Gloucester LGA as at 2011 was 4,991 – an increase of 112 persons between 2006 and 2011.

Table 16.1

## Estimated Resident Population (persons) - Gloucester LGA

Year	Estimated Resident Population	Total Change (persons)
2001	4,888	
2006	4,879	-9
2011	4,991	112

Source: ABS

- By age, persons aged 50-64 and 65+ experienced the greatest increase over the five years to 2011 – increasing by 66 and 207 respectively.
- In contrast, the 0-19 and 35-49 (traditional 'family' cohorts) age cohorts experienced an outright decline over the five year period.
- Compared to the North average (43%), there is a skew to aged persons in the Gloucester LGA, with 49% of the population aged 50 and above.

Table 16.2

## Population By Age (persons) - Gloucester LGA

Age cohort	2006	2011	Change (2006-2011)	Composition
0-19	1,173	1,108	-65	22%
20-34	539	546	7	11%
35-49	989	886	-103	18%
50-64	1,125	1,191	66	24%
65+	1,053	1,260	207	25%
<b>Total</b>	<b>4,879</b>	<b>4,991</b>	<b>112</b>	<b>100%</b>



### 16.3.2 Migration movements

Inward and outward movements for the Gloucester LGA have been analysed, using 2006 and 2011 Census data (Place of Usual Residence).

- Over the five years to 2011, net migration into the Gloucester LGA totalled 154 persons.
- Persons who previously lived in Sydney accounted for the largest proportion of the net migration gain (243 persons).
- By age, persons aged 35-49 (upgraders) incurred the largest share of inward movements (205 persons).
- At approximately 40 persons, overseas migration was minimal, predominantly from persons aged 20-34.
- By age, net migration was largest for the 50-64 age cohort (89 persons).

Table 16.3

Net Migration by Age - Gloucester LGA

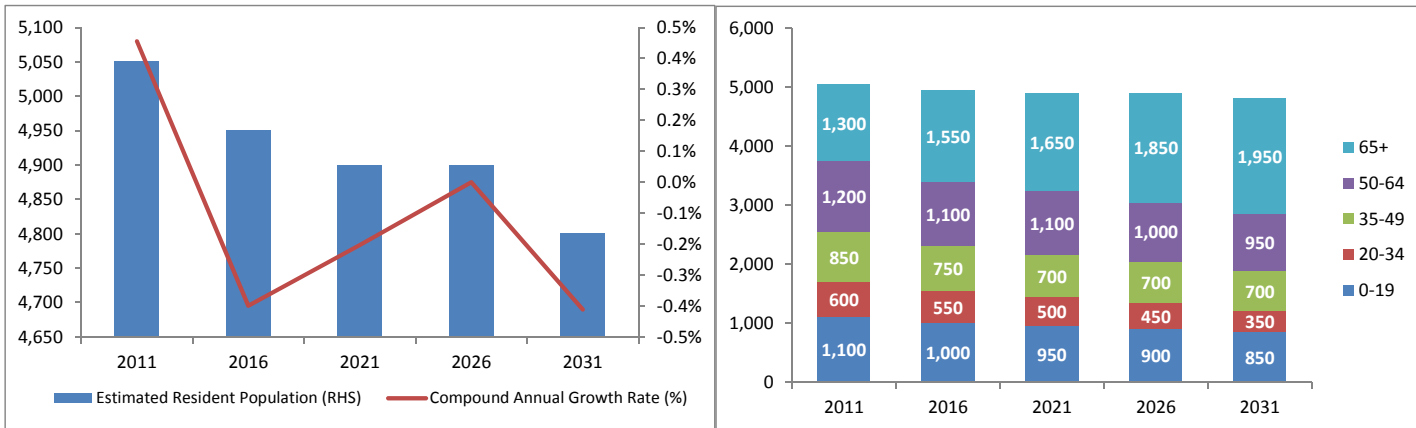
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	-4	10	2	-14	-26	-32
Sydney	28	7	64	102	42	243
Regional NSW	-1	-59	3	-10	23	-44
Interstate	-30	-21	1	11	-14	-53
Overseas	11	16	8	0	5	40
<b>Total Net Migration</b>	<b>4</b>	<b>-47</b>	<b>78</b>	<b>89</b>	<b>30</b>	<b>154</b>

Source: ABS

### 16.3.3 Population projections

- According to the DP&E (2014) projections, the Gloucester LGA population is projected to decrease to 4,850 by 2031 – a decrease of 150 persons over the 2011-2031 period.

**Figure 1. Projected Population (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- Between 2011 and 2031, the number of persons aged 65+ is projected to expand by 650, making it the only age cohort in Gloucester LGA to experience a gain.
- In turn, solid growth in senior residents is expected to support demand for health and aged care services in Gloucester. To a degree, this has been evidenced by the recently proposed hostel, nursing home and self-care unit complex in Gloucester.

### 16.3.4 Labour force status

- Of all residents, around 84% were aged 15 years or above.
- According to Census data, labour force participation from those aged 15 years and above was approximately 53% i.e. 2,068 of 3,914 residents<sup>15</sup>.
- Of residents in labour force, 95% were employed and 5% unemployed (and seeking working) at the time of the Census (2011).
- The employment rate in Gloucester LGA was higher than that observed for the North Coast (92%).

**Table 16.4**

**Labour Force Status by Age (number) - Gloucester LGA**

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	124	15	139	138	277
20 - 29	215	24	239	54	293
30 - 39	295	25	320	88	408
40 - 49	488	21	509	109	618
50 - 59	452	13	465	219	684
60 - 69	319	8	327	504	831
70 - 79	60	0	60	434	494
80 - 84	9	0	9	172	181
85+	0	0	0	128	128
<b>Total</b>	<b>1,962</b>	<b>106</b>	<b>2,068</b>	<b>1,846</b>	<b>3,914</b>

*Source: Census of Population and Housing (2011)*

### 16.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Gloucester LGA.
- Around 77.5% employed residents also worked in the Gloucester LGA.

<sup>15</sup> ABS Census of Population and Housing 2011

- The remaining 22.5% of working residents travel either to other North Coast LGAs (7.9%) or locations outside the North Coast (14.7%) for work.
- Of working residents who travelled to other North Coast LGAs, popular workplace destinations include Great Lakes (5.8%) and Greater Taree (2.1%) LGAs.

Table 16.5

## Job Containment - Gloucester LGA

	Value
Working residents	1,948
<u>Place of Work (number)</u>	
Gloucester	1,509
North Coast LGAs (ex. Gloucester)	153
Outside North Coast	286
<b>Total</b>	<b>1,948</b>
<u>Job Containment (%)</u>	
Gloucester	77.5%
North Coast LGAs	7.9%
Other	14.7%
<b>Total</b>	<b>100.0%</b>

Source: Census of Population and Housing (2011), MacroPlan Dimasi

- Job containment by industry classification is presented the next table.
- According to Census 2011 data, relative to the all industries average in Gloucester (77.5%), twelve industries achieved a higher rate of job containment.
- Consistent with other LGAs, the Rental, Hiring and Real Estate industry achieved the highest rate of job containment (96.3%) of all industries in Gloucester LGA.
- With the exception of Agriculture, Forestry and Fishing (90.5%), high job containment industries are predominantly service or professional orientated.

Table 16.6  
Job Containment by Industry - Gloucester LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Rental, Hiring and Real Estate Services	96.3%	0.0%	3.7%	100.0%
Financial and Insurance Services	95.0%	0.0%	5.0%	100.0%
Agriculture, Forestry and Fishing	90.5%	1.0%	8.5%	100.0%
Accommodation and Food Services	90.3%	4.5%	5.2%	100.0%
Other Services	89.1%	0.0%	10.9%	100.0%
Retail Trade	87.9%	5.6%	6.6%	100.0%
Electricity, Gas, Water and Waste Services	87.5%	0.0%	12.5%	100.0%
Public Administration and Safety	85.5%	3.6%	10.9%	100.0%
Education and Training	82.5%	9.8%	7.7%	100.0%
Information Media and Telecommunications	80.0%	0.0%	20.0%	100.0%
Professional, Scientific and Technical Services	79.7%	6.8%	13.5%	100.0%
Health Care and Social Assistance	78.5%	11.9%	9.6%	100.0%
<b>Across all industries</b>	<b>77.5%</b>	<b>7.9%</b>	<b>14.7%</b>	<b>100.0%</b>
Wholesale Trade	77.4%	0.0%	22.6%	100.0%
Manufacturing	70.8%	15.8%	13.3%	100.0%
Arts and Recreation Services	70.0%	0.0%	30.0%	100.0%
Transport, Postal and Warehousing	61.8%	3.9%	34.2%	100.0%
Administrative and Support Services	57.1%	0.0%	42.9%	100.0%
Mining	51.5%	26.2%	22.3%	100.0%
Construction	47.4%	15.6%	37.0%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 16.4 Employment and labour market trends

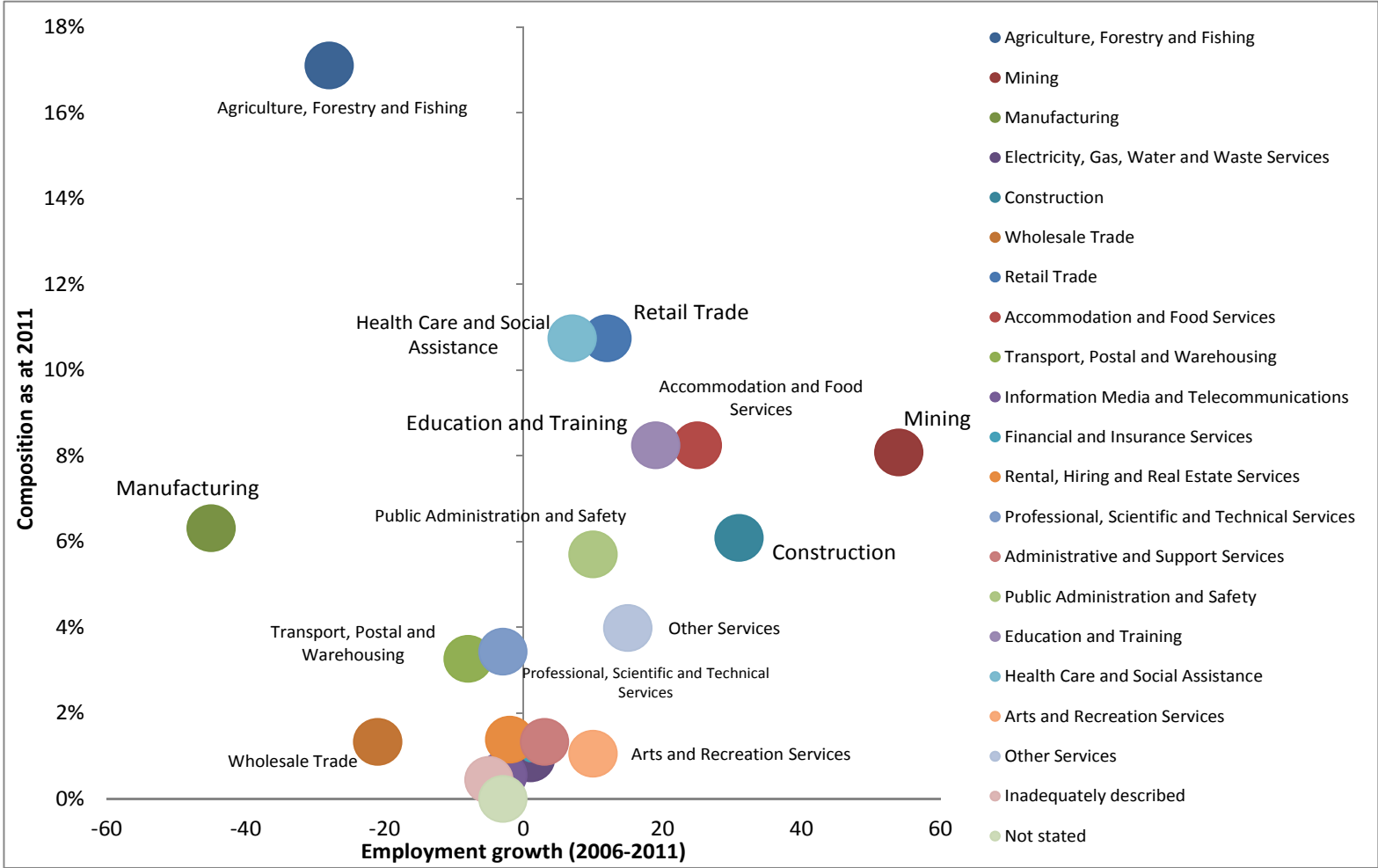
### 16.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Gloucester LGA and identify key emerging trends and drivers that have 'shaped' and influenced its labour market over the last five years.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Gloucester LGA supported 1,807 jobs, accounting for just 1% of total jobs in the North Coast region.
- Unlike the broader North Coast region, the composition of employment within the Gloucester LGA is skewed to primary industry. The largest employing industry is Agriculture, Forestry and Fishing, accounting for 19.2% of total jobs

in the LGA – significantly above the North Coast average for this industry (4.7%).

- As at 2011, the next four largest employing industries in the Gloucester LGA were Retail Trade (10.7%), Health Care and Social Assistance (10.7%), Accommodation and Food Services (8.2%) and Education and Training (8.2%)
- With the exception of Agriculture, Forestry and Fishing, the employment profile within the Gloucester LGA is predominated service-orientated.
- At the same time, representation within white collar industries is below the North Coast average – 16.9% for Gloucester LGA vs. 20.6% for North Coast region.
- The composition of persons employed within the Health Care and Social Assistance industry is significantly below the North Coast average – 10.7% for Gloucester LGA vs. 16.5% for North Coast region.
- Over the five year period to 2011, 70 new jobs were created in Gloucester LGA.
- In the Gloucester LGA, jobs growth over the five years to 2011 was very different from other North Coast LGAs as the mining industry accounted for the majority of new jobs over the period – net addition of 54 new jobs.
- The Mining, Construction and Accommodation and Food Services industries both incurred a modest gain in workforce employment – at 54, 31 and 25 jobs added respectively.
- Nine industries registered job losses, with the greatest loss occurring within the Manufacturing industry (-45 jobs).
- Approximately 14 industries exhibited a change of 20 or less jobs over the five year period to 2011 – consistent with a small workforce.

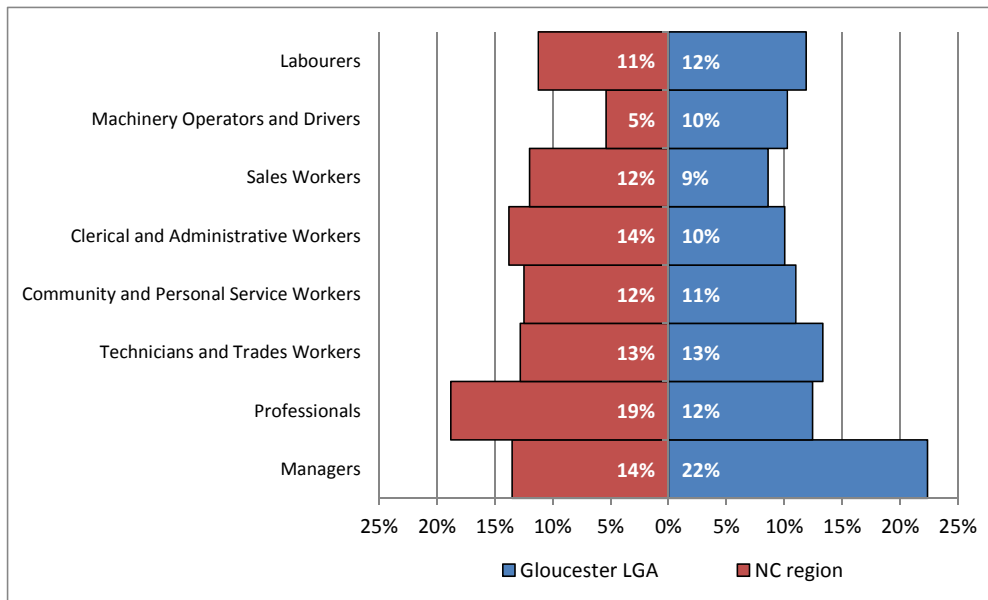
Figure 2. Employment composition and growth by industry, Gloucester LGA



**16.4.2 Occupation profile**

- As at Census 2011, approximately 22% of Gloucester LGA's residents were employed as a 'Manager'. This representation is significantly above the NC average of 14%.
- At the same time, the composition of persons employed in a 'professional' capacity is considerably below the NC region average - 12% for Gloucester LGA vs. 19% for North Coast region.

**Figure 3. Occupation Composition (2011)**



Source: Census 2011, MacroPlan Dimasi

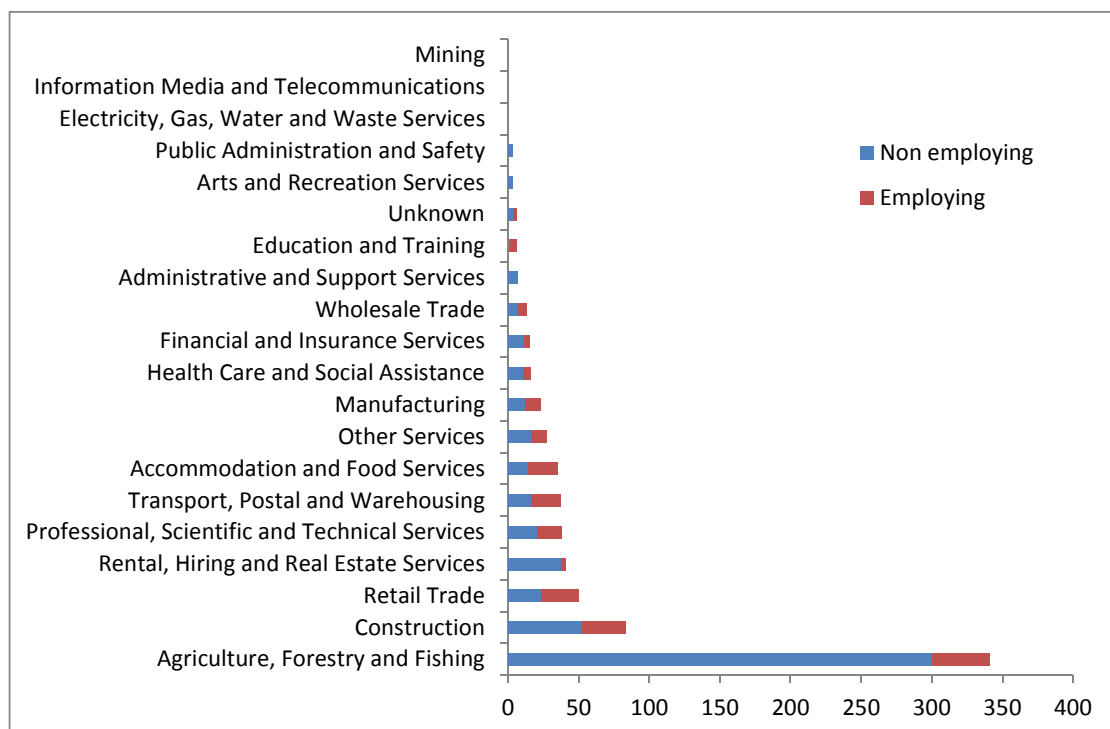
- The Gloucester LGA's skew to persons employed in Mining and Agriculture, Forestry and Fishing is reflective by the high representation of persons employed as Machinery Operators and Drivers (10%).



### 16.4.3 Business composition & change

- As at June 2011, there were 744 businesses operating within the Gloucester LGA - 72% of which were non-employing/sole trading businesses.
- Businesses representation was greatest within the Agriculture, Forestry and Fishing industry, accounting for 46% of all businesses in the LGA. However, of the 341 businesses in the industry, only 41 employed workers.
- Following Agriculture, Forestry and Fishing, the next largest industries are Construction (83 businesses) and Retail Trade (50 businesses).
- At June 2011, three businesses employed 200 or more persons in the Gloucester LGA - all three in the Health Care and Social Assistance industry.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Notably, business growth was recorded in both non-employing and employing businesses over the 2009 to 2011 period. In total, 18 new businesses were formed over this period.

- Business growth was most pronounced in employing businesses, largely as a result from solid growth in Wholesale Trade (+10).
- In contrast, the largest reduction in business numbers occurred within Rental, Hiring and Real Estate Services (-8 businesses).

Table 16.7  
Business Composition and Change - Gloucester LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	-3	3	0
Retail Trade	0	3	3
Accommodation and Food Services	0	1	1
Education and Training	0	-3	-3
Construction	3	4	7
Public Administration and Safety	-	-	0
Manufacturing	2	2	4
Professional, Scientific and Technical Services	0	5	5
Other Services	2	0	2
Transport, Postal and Warehousing	3	-8	-5
Agriculture, Forestry and Fishing	3	-3	0
Administrative and Support Services	-3	3	0
Wholesale Trade	-2	12	10
Rental, Hiring and Real Estate Services	-5	-3	-8
Financial and Insurance Services	2	0	2
Arts and Recreation Services	0	-3	-3
Electricity, Gas, Water and Waste Services	-	-	0
Information Media and Telecommunications	3	0	3
Mining	-	-	0
Not Classified	0	0	0
<b>Total</b>	<b>5</b>	<b>13</b>	<b>18</b>

Source: ABS

#### 16.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- The employment base within Gloucester is relatively minute in comparison to other LGAs within the North Coast. As such, it is subject to greater fluctuation from new investment and conversely business closures.
- Over the five years to 2011, employment growth has been modest, with 70 jobs created.

- The greatest concern for the Gloucester LGA is the rate of ageing within its workforce. As at 2011, almost half (49%) of Gloucester's population was aged 50 or above, with 51% of these in older cohorts (i.e. 65+).

## **16.5 Employment Land Supply**

### **16.5.1 Zoned Urban Employment Land**

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Gloucester LGA.
- The information presented in this assessment is based on the Gloucester Local Environmental Plan 2010.
- Three main employment land use categories are used in the Gloucester LGA i.e. Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

Classification	Land Use Zone	Area (ha)	%
Business	B2. Local Centre	14.0	5%
	B4. Mixed Use	6.2	2%
	<b>Total</b>	<b>20.3</b>	<b>7%</b>
Industrial	IN1. General Industrial	72.5	25%
	IN3. Heavy Industrial	197.3	67%
	<b>Total</b>	<b>269.8</b>	<b>92%</b>
Special Uses	SP1. Special Activities	1.0	0%
	SP2. Infrastructure	3.4	1%
	<b>Total</b>	<b>4.4</b>	<b>1%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>294.5</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- Overall, there are 294.5 hectares of zoned urban employment land in the Gloucester LGA.
- It is estimated 92% or around 270 hectares of this allocation is for industrial uses, predominantly IN3 Heavy Industrial (197.3 hectares).
- Combined, there is 20.3 hectares of zoned land allocated to Business Uses, including 14 hectares as B2 Local Centre.
- The SP2 Infrastructure allocation of 3.4 hectares is the Gloucester Hospital.

### 16.5.2 Industrial – Existing Supply

- In the Gloucester LGA, there are two industrial land use zones used i.e. IN1 General Industrial and IN3 Heavy Industrial.
- Our examination has revealed one major industrial precinct for the LGA (as in Table 16.9 below).

<b>Name</b>	<b>Total Area</b> (hectares)	<b>Developed</b> (hectares)	<b>Developed</b> (%)
South Gloucester Industrial Precinct	120.0	55.0	46%
<b>Total</b>	<b>120.0</b>	<b>55.0</b>	<b>46%</b>

*Source: MacroPlan Dimasi*

Key findings pertinent to our investigation include:

- Identified precincts occupy approximately 120.0 hectares of zoned industrial land.
- Comprising 120 hectares of zoned land, the **South Gloucester Industrial Precinct** is located approximately 2km south of Gloucester town centre.
- Of the total, it is estimated that around 55.0 hectares or 46% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 65.0 hectares of zoned land available for future development.
- At an average floor space ratio of 0.6:1, this equates to approximately 39.0 hectares of industrial floorspace.

### 16.5.3 Industrial – Future supply

- Entailing 135 hectares of land, construction of the **South Stratford Industrial Estate** is currently underway. It is located one kilometre south of Stratford and 15 kilometres from Gloucester Town. Positioned on Bucketts Way, the location has exceptional road access to major regional markets i.e. Tamworth, Taree and Armidale.












# Map 16.1

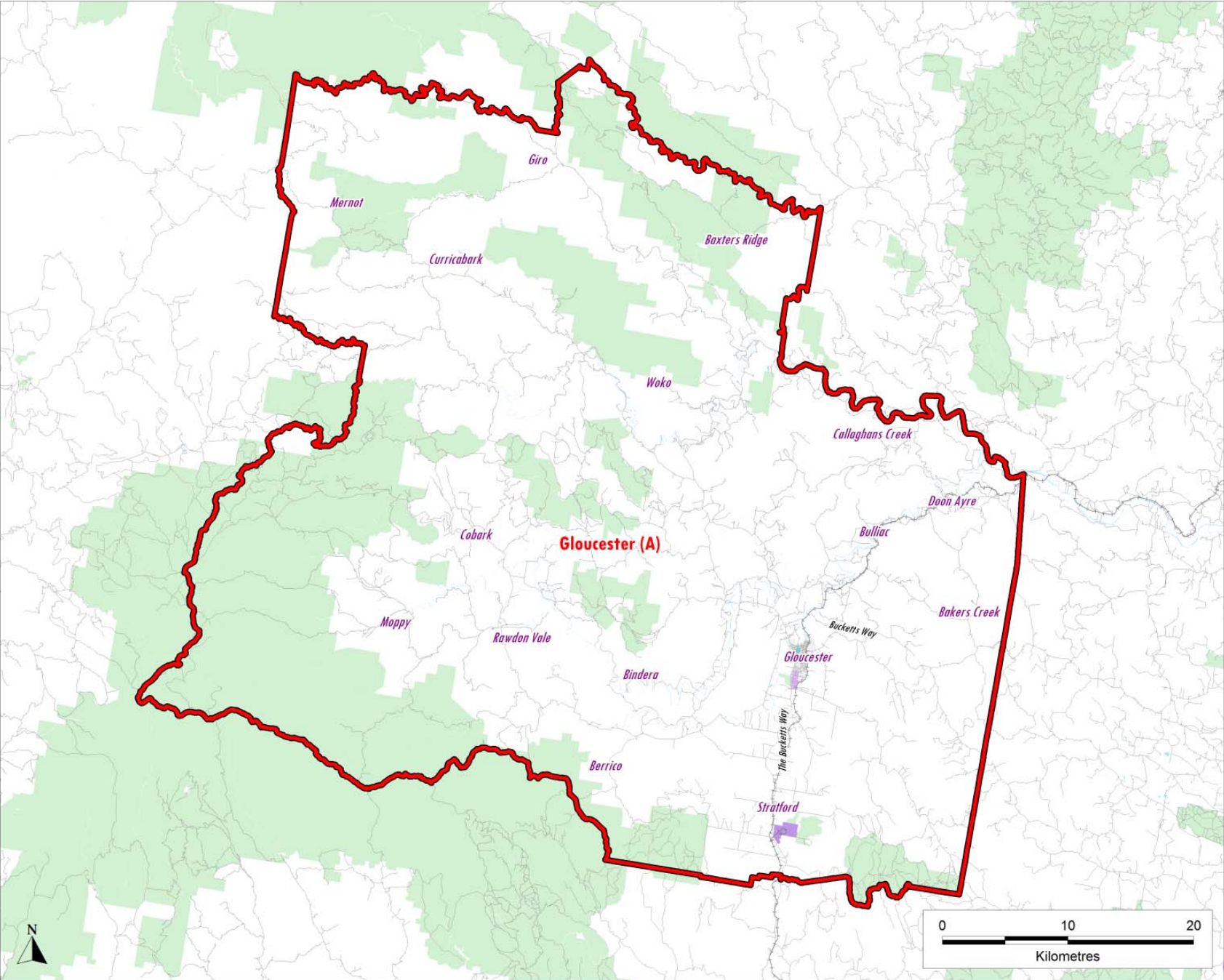
## Gloucester Shire Council Employment Land Zones

Legend \*

 Gloucester Shire Council Boundary

Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





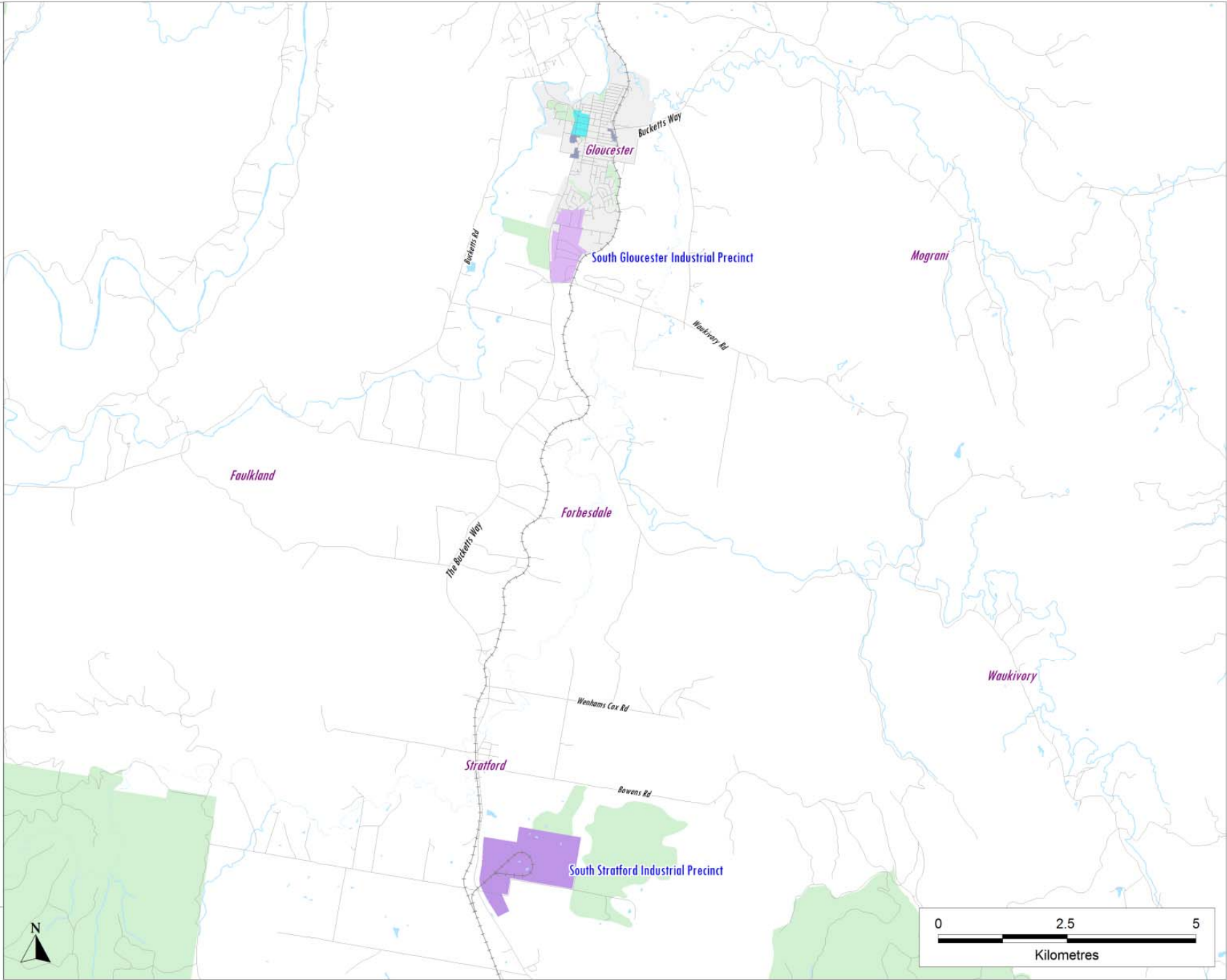
# Map 16.2

## Gloucester & Stratford Employment Land Zones

### Legend

#### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts



#### **16.5.4 Retail & Commercial – Existing supply**

The Gloucester LGA retail/commercial centres and bulky/homemaker retail provisions outlined on Map 16.3 and Map 16.4.

- The Gloucester Town Centre is the only defined location of activity within the LGA
- There are no discount department stores (dds), or department stores, nor any major enclosed shopping centres in the Gloucester LGA. There is are larger provision of retail in Forster and the closest higher order shopping facilities are located in Greater Taree.

#### **Gloucester Town Centre**

- The Gloucester Town Centre is the dominant retail destination within the LGA, occupying around 20.3 ha of business zoned land, including the 14.0 ha of B2 zoned land and 6.2 ha of B4 zoned land. The town centre is oriented along Bucketts Way, which is the main thoroughfare through the Gloucester LGA.
- The town centre is estimated to provide approximately 13,000 - 15,000 sq.m of retail floorspace and about 6,000 – 8,000 sq.m of non-retail commercial/shopfront floorspace.
- The town centre includes a full-line Woolworths supermarket as well as a smaller Foodworks supermarket. The town centre also provides a range of cafes, restaurants, pubs and convenience retail – including retail services and non-food retail like pharmacies, hardware stores, discount variety stores and fashion and sporting goods retailers.
- In regards to non-retail uses, there are service stations, pubs, medical/health facilities, accountants, lawyers, banks, and real estate agencies.














# Map 16.3

## Gloucester Shire Council Retail Provision



### Legend \*

 Gloucester Shire Council Boundary

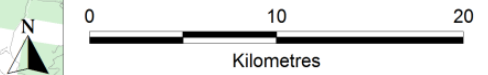
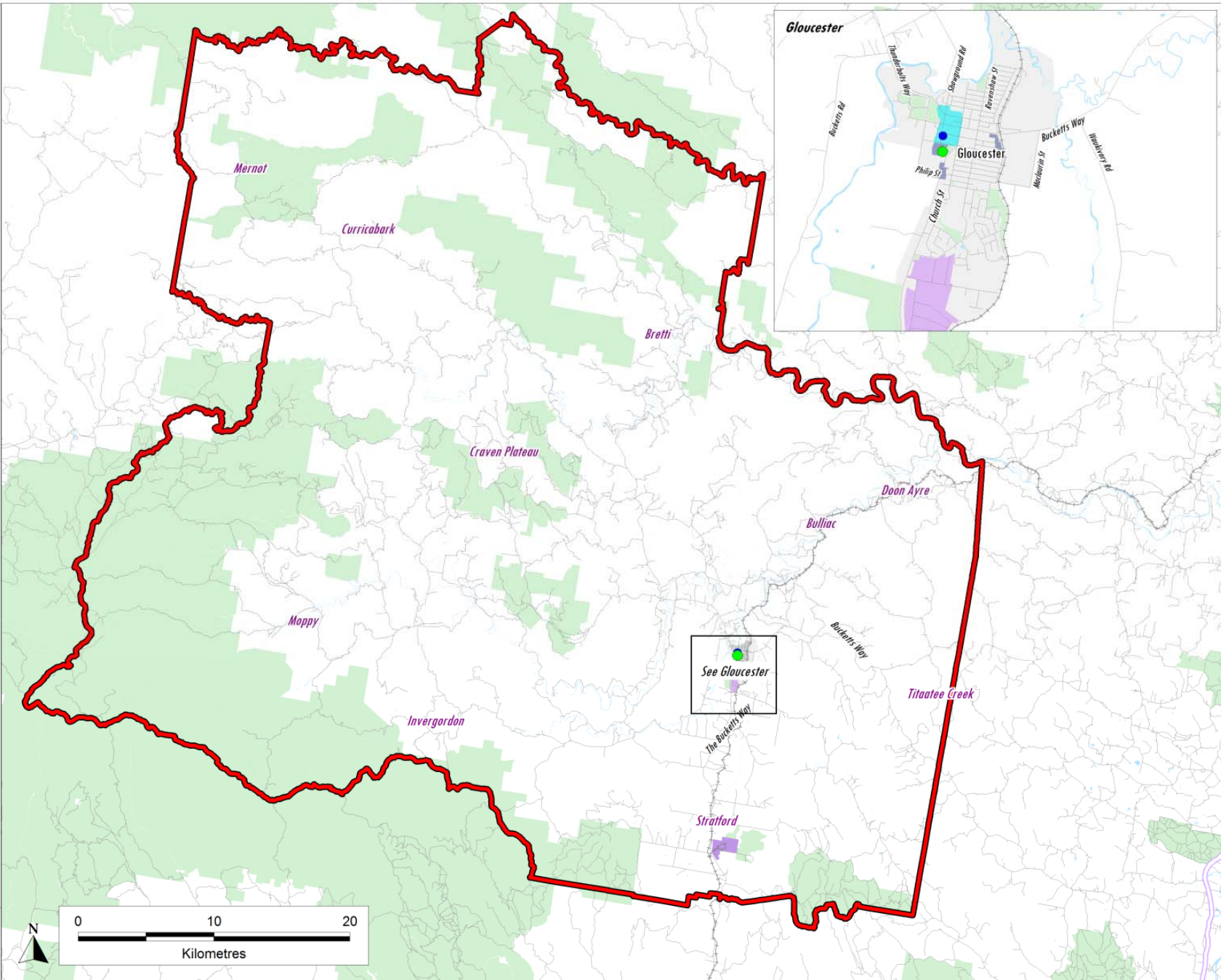
### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

### Retail Competition

-  Woolworths
-  Other Smkt (inc. Foodworks, IGA Express etc.)

\* Hollow symbols indicate proposed stores



# Map 16.4 Gloucester Shire Council

## Bulky/ Homemaker Goods Retailing












### Legend \*

 Gloucester Shire Council Boundary

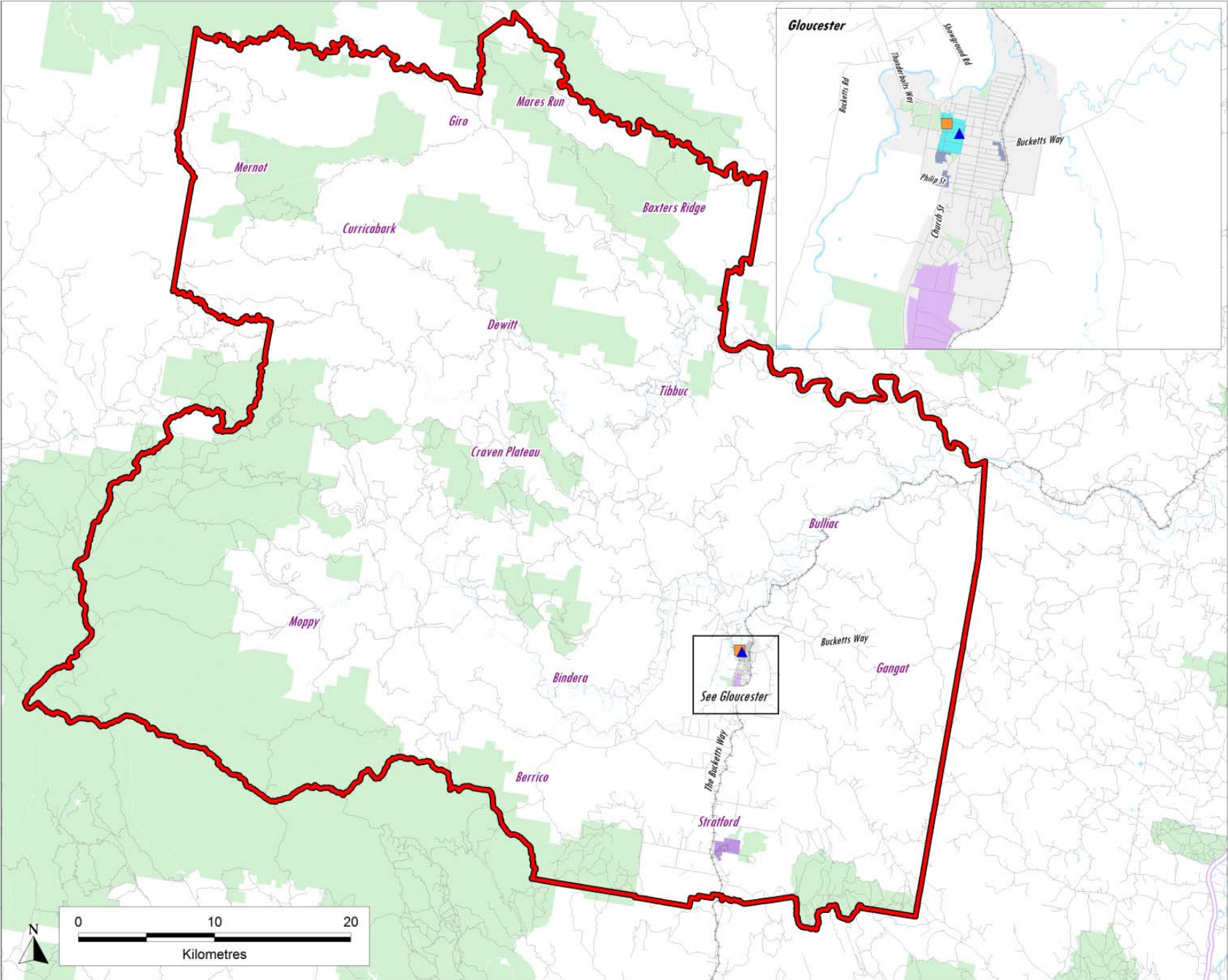
#### Bulky Goods Retailers

 Home Hardware  
 Autopro

#### Land Zones

 B1	 B7
 B2	 IN1
 B3	 IN2
 B4	 IN3
 B5	 IN4
 B6	

\* Hollow symbols indicate proposed stores



### **Business zoned land capacity**

Table 16.10 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there is approximately **20.3 hectares of business zoned land** within the Gloucester LGA, of which 14.0 ha is B2 zoned land and 6.2 ha of B1 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- There is no other business zoned land in the LGA.
- We have applied FSRs for each business zone type from the Gloucester LEP 2010 and for zones where FSRs are not applied, we have relied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Gloucester LGA to be in the order of 304,260 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 40%, given the relative lack of higher order retail facilities, compared with the suburbs of Forster and Greater Taree. In order to gain an indicative understanding of the suitability, and capacity, of the current provision of business zoned land to meet future demand we have compared the estimated 'net retail demand' now, and in 2031. Accounting for the estimated land requirement of 0.4 hectares over the forecast period, the spare capacity of business zoned land within the Gloucester LGA decreases to 5.0 hectares.

**Table 16.10**  
**Gloucester LGA - Business zoned land capacity (sq.m)**

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B2	14.0	1.50	210,730.38
Total B4	<u>6.2</u>	<u>1.50</u>	<u>93,531.91</u>
<b>Total LGA</b>	<b>20.3</b>		<b>304,262</b>

Source: MapInfo; NSW Govt; MacroPlan Dimasi

### 16.5.5 Retail & Commercial – Future supply

There are no proposed retail developments of significance within the Gloucester LGA.

### 16.5.6 Special Uses – Existing supply

- As per the Gloucester LEP 2010, there are two categories associated with 'Special Use' zoning; SP1 Special Activities and SP2 Infrastructure.
- Cemeteries, caravan parks, pump stations, sewerage treatment plants, waste disposal sites and other miscellaneous uses have been omitted from our urban employment land estimates for this category.
- The Special Activities (SP1) category amounts to 15.96 hectares. Motels occupy one hectare of this land, including the King Street Motel, the Gloucester Country Lodge Motel and the Bucketts Way Motel and Restaurant. We estimate that approximately 0.8 hectares of 'motel' land has been developed, allowing for 0.2 hectares to be developed in the future.
- Of the 79 hectares allocated to SP2 Infrastructure, 3.4 hectares is used for health services i.e. the Gloucester Soldiers Memorial Hospital. Of the 3.4 hectares, we estimate that approximately 1.7 hectares is developed, meaning there is approximately 1.7 hectares of land available for future development.



**Figure 5. Satellite Image of Gloucester Soldiers Memorial Hospital**



*Source: SIX maps (NSW Department of Planning and Environment)*

### **16.5.7 Special Uses – Future supply**

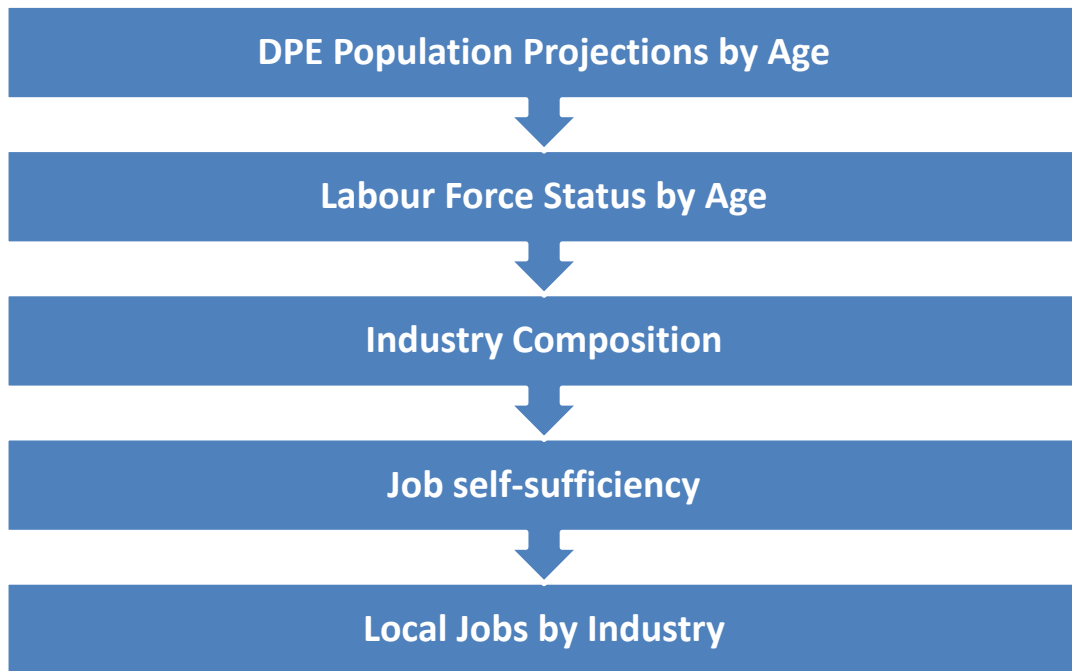
Within the Special Use category of zoning there are currently no proposed developments or upgrades to existing facilities.

## **16.6 Demand for employment land**

### **16.6.1 Methodology**

- In order to derive the quantum of commercial, industrial and special use land required in the Gloucester LGA, we first generate employment projections for the region.
- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of Gloucester LGA to generate jobs.

- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections
- The flowchart below depicts the process used to derive employment forecasts for the Gloucester LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  3. Converting jobs by industry into specific built form types
  4. Applying indicative employment densities
- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 16.6.2 Employment Projections

- Following 70 job additions during the 2006 and 2011 period, employment in the Gloucester LGA is projected to increase over the forecast period. Between 2011 and 2031, it is expected the workforce will expand by 111 jobs.
- Over the ten years to 2021, our employment projections imply jobs growth for the Gloucester LGA (83 jobs). As at 2021, the LGA is projected to support 1,883 jobs.
- By 2031, employment in the LGA is expected to expand further to 1,917, which represents an increase of 29 jobs over this period.
- At an average growth rate of 6 jobs per annum, the projected rate of employment growth is below that observed between 2006 and 2011 (average of 14 jobs per annum).
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+32), Accommodation and Food Services (+22) and Education and Training (+22).
- On the other hand, outright job losses are predicted for four industries – all contracting by less than 10 jobs.

**Table 16.12**  
**Employment by Industry - Gloucester LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	194	219	226	32
Accommodation and Food Services	149	164	171	22
Education and Training	149	166	171	22
Retail Trade	110	113	123	13
Construction	194	208	205	11
Mining	146	153	157	11
Rental, Hiring and Real Estate Services	25	26	34	9
Electricity, Gas, Water and Waste Services	17	20	24	7
Wholesale Trade	24	26	29	5
Financial and Insurance Services	19	22	23	4
Professional, Scientific and Technical Services	62	59	65	3
Other Services	72	73	75	3
Transport, Postal and Warehousing	59	60	61	2
Administrative and Support Services	24	25	26	2
Information Media and Telecommunications	309	316	309	0
Arts and Recreation Services	10	8	8	-2
Agriculture, Forestry and Fishing	19	20	17	-2
Public Administration and Safety	103	105	97	-6
Manufacturing	114	111	105	-9
Other*	8	-5	-7	-15
<b>Total</b>	<b>1,807</b>	<b>1,890</b>	<b>1,919</b>	<b>112</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.



**Table 16.13**  
Industry and Land Use Conversion Matrix - Gloucester LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	30%	0%	70%	100%
Health Care and Social Assistance	0%	80%	0%	20%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

Source: MacroPlan Dimasi

- From these ratios, we derive employment projections by land use, as presented in the next table.

**Table 16.14**  
Employment Additions by Land Use Type - Gloucester LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	1	0	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	0	0	3	4	0	0
Construction	0	1	3	8	0	0
Wholesale Trade	2	2	0	1	0	0
Retail Trade	13	0	1	0	0	0
Accommodation and Food Services	12	3	5	1	0	0
Transport, Postal and Warehousing	0	0	1	1	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	3	0	0	0	0	0
Rental, Hiring and Real Estate Services	1	8	0	0	0	0
Professional, Scientific and Technical Services	0	7	0	0	0	0
Administrative and Support Services	1	0	0	0	0	0
Public Administration and Safety	2	0	0	0	0	0
Education and Training	5	2	0	0	11	4
Health Care and Social Assistance	20	6	0	0	5	1
Arts and Recreation Services	1	0	0	0	0	0
Other Services	1	2	0	0	0	0

Note: These figures may be subject to rounding  
Source: MacroPlan Dimasi

### 16.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Gloucester LGA (presented in Table 16.15).

**Table 16.15**

**Indicative Employment Density by Industry and Land Use Type - Gloucester LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.

**Table 16.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Gloucester LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	130	80	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	10	20	660	930	0	0
Construction	10	30	450	1,270	0	0
Wholesale Trade	50	70	80	120	0	0
Retail Trade	530	0	100	0	0	0
Accommodation and Food Services	590	170	750	220	0	0
Transport, Postal and Warehousing	10	10	230	150	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	90	10	0	0	0	0
Rental, Hiring and Real Estate Services	20	200	0	0	0	0
Professional, Scientific and Technical Services	0	170	0	0	0	0
Administrative and Support Services	30	10	0	0	0	0
Public Administration and Safety	50	0	0	0	0	0
Education and Training	190	80	0	0	540	220
Health Care and Social Assistance	810	230	0	0	300	90
Arts and Recreation Services	60	0	0	0	0	0
Other Services	20	90	0	0	0	0
<b>Total</b>	<b>2,470</b>	<b>1,090</b>	<b>2,400</b>	<b>2,770</b>	<b>840</b>	<b>310</b>

Source: MacroPlan Dimasi

- Under this scenario, it is estimated approximately **2,470 sq.m of commercial, 2,400 sq.m of industrial and 840 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **1,090 sq.m of commercial, 2,770 sq.m of industrial and 310 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 16.17.

- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better representation of actions and decisions made by businesses.

**Table 16.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Gloucester LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	100	60	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	10	10	490	700	0	0
Construction	10	20	340	950	0	0
Wholesale Trade	40	50	60	90	0	0
Retail Trade	390	0	70	0	0	0
Accommodation and Food Services	440	130	570	170	0	0
Transport, Postal and Warehousing	10	0	180	110	0	0
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	60	10	0	0	0	0
Rental, Hiring and Real Estate Services	20	150	0	0	0	0
Professional, Scientific and Technical Services	0	120	0	0	0	0
Administrative and Support Services	20	10	0	0	0	0
Public Administration and Safety	30	0	0	0	0	0
Education and Training	140	60	0	0	410	170
Health Care and Social Assistance	600	170	0	0	230	60
Arts and Recreation Services	40	0	0	0	0	0
Other Services	20	70	0	0	0	0
<b>Total</b>	<b>1,830</b>	<b>800</b>	<b>1,810</b>	<b>2,080</b>	<b>640</b>	<b>230</b>

Source: MacroPlan Dimasi

- The Alternative Scenario indicates **1,830 sq.m of commercial, 1,810 sq.m of industrial** and **640 sq.m of special use** floorspace demand will materialise by 2021.
- Under the alternative scenario, demand is anticipated to rise for industrial floorspace, but contract marginally for commercial and special uses. Over the ten years to 2031, demand for additional **800 sq.m of commercial, 2,080 sq.m of industrial** and **230 sq.m of special uses** floorspace is expected.

#### 16.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Gloucester LGA was extracted from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B2 Local Centre 1.5:1
  - B4 Mixed Use 1.5:1
- As such, an observed FSR of 1.5:1 has been applied on business zones. For industrial and special uses, average North Coast FSRs have been used i.e. 0.6:1 for industrial uses and 0.8:1 for Special Use zoned land.
- Based on derived floorspace requirements and these average floor space ratios, MacroPlan Dimasi estimates around **0.2 hectares of commercial**, **0.6–0.9 hectares of industrial** and **0.1 hectares of special uses** land will be required by 2031.

**Table 16.18**

Demand for Employment Land (2031) - Gloucester LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	0.3 - 0.4	1.5	0.2
Industrial	0.4 - 0.5	0.6	0.6 - 0.9
Special Uses	0.1	0.8	0.1

Source: MacroPlan Dimasi

### 16.6.5 Demand for retail floorspace

In the Gloucester Shire LGA, the potential drivers of demand for retail floorspace in the future are summarised below:

- Population growth – which is expected to be relatively flat (i.e. zero/negative growth).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 0.9% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 16.19 outlines the retail floorspace expenditure and resultant retail floorspace demand generated by the population within the Gloucester LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 16.19 shows the following:

- As at 2014, the residential population of the Gloucester LGA generates more than **10,300 sq.m** of retail floorspace demand, which is equivalent to a provision rate of approximately **2.1 sq.m per capita**.
- By 2031, the total residential retail floorspace demand is estimated to grow by nearly **1,150 sq.m**, which is an increase of about **11%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to around **1,400 sq.m**, and is expected to increase by approximately **150 sq.m** by 2031.

- Assuming an average floorspace ratio (FSR) of 0.5, the total growth in demand for retail floorspace, of about **1,300 sq.m**, equates to an equivalent land requirement of **0.3 hectares**.

**Table 16.19**  
Gloucester LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	5,000	5,000	5,000	4,900	4,850	-0.2%
Tourism equiv. pop	679	679	679	666	659	-0.2%
<u>Retail exp. (\$M)</u>						
Food & liquor	29	29	31	31	33	0.7%
Food catering	7	7	8	8	8	1.0%
Apparel	5	5	5	5	5	0.2%
Household	11	11	11	11	11	0.2%
Leisure	3	3	3	3	3	0.5%
General	5	5	5	6	6	0.9%
Retail services	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>0.5%</u>
<b>Total</b>	<b>61</b>	<b>62</b>	<b>64</b>	<b>66</b>	<b>68</b>	<b>0.6%</b>
<u>Category RTD (\$/sq.m)</u>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	6,000	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<u>Floorspace demand (sq.m)</u>						
Food & liquor	3,205	3,254	3,394	3,494	3,623	0.7%
Food catering	1,172	1,195	1,263	1,316	1,381	1.0%
Apparel	927	932	948	953	963	0.2%
Household	3,523	3,541	3,604	3,619	3,660	0.2%
Leisure	496	501	516	525	538	0.5%
General	838	853	896	929	971	0.9%
Retail services	<u>275</u>	<u>277</u>	<u>286</u>	<u>291</u>	<u>297</u>	<u>0.5%</u>
<b>Total</b>	<b>10,323</b>	<b>10,456</b>	<b>10,852</b>	<b>11,118</b>	<b>11,470</b>	<b>0.9%</b>
Floorspace per capita	2.06	2.09	2.17	2.27	2.37	0.8%
<u>Tourism demand</u>						
Equiv. tourism pop.	679	679	679	666	659	-0.2%
Floorspace per capita	<u>2.06</u>	<u>2.09</u>	<u>2.17</u>	<u>2.27</u>	<u>2.37</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>1,403</b>	<b>1,421</b>	<b>1,475</b>	<b>1,511</b>	<b>1,559</b>	<b>0.6%</b>
<b>Total retail demand (sq.m)</b>	<b>11,725</b>	<b>11,877</b>	<b>12,327</b>	<b>12,628</b>	<b>13,029</b>	<b>0.6%</b>
<b>Demand growth (14-31)</b>					<b>1,304</b>	
<b>Estimated land take (ha)</b>					<b>0.3</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 16.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Gloucester LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Gloucester LGA.

Key findings pertaining to our gap assessment are presented in Table 16.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	20.3	12.2	0.0	12.2	0.5	11.7
Industrial	269.8	66.0	135.0	201.0	0.8	200.2
Special Uses	4.4	1.9	0.0	1.9	0.1	1.8

Source: MacroPlan Dimasi

- Overall, there is sufficient land available in Gloucester LGA to accommodate future employment needs over the forecast period.
- Specifically, it is estimated:
  - *Supply of business land will exceed demand by 11.7 hectares*
  - *Supply of industrial land will exceed demand by 200.2 hectares*
  - *Supply of special uses land will exceed demand by 1.8 hectares*
- Local environmental and general development constraints such as flooding, topography and the cost of delivering services may reduce the quantum of land available for future development in the Gloucester LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Gloucester LGA.



## 16.8 Conclusions

### 16.8.1 Commercial, Industrial and Special Uses

As at 2011, the resident population of Gloucester was 4,991, making it the smallest LGA in terms of population. Over the 2006 to 2011 period, the resident population expanded by 112 persons (23 persons per annum).

By age, persons aged 50-64 and 65+ experienced the greatest increase over the five years to 2011 – increasing by 66 and 207 respectively. On the other hand, the traditional ‘family’ age cohorts of 0-19 and 35-49 experienced an outright decline over this period.

In line with its subdued population growth, jobs growth over the five years to 2011 was relatively minute (+70). The LGA’s largest employing industry (Agriculture, Forestry and Fishing) experienced considerable employment losses over the period, which is a concern because if further employment losses were to ensure, it could result in heightened unemployment in the LGA.

Similarly, the LGA has a relatively low provision of Health Care and Social Assistance employment in comparison to the LGA’s aged population structure. As at 2011, almost half (49%) of Gloucester’s population was aged 50 or above, yet only 10.7% of all jobs are within the Health Care and Social Assistance industry. This represents a mismatch between the two, and it is likely that many aged residents may have to leave the LGA for medical services as a result.

Key economic and demographic drivers which are expected to influence the Gloucester LGA include:

- DPE projections suggest the resident population of Gloucester LGA will decrease, from 4,991 in 2011 to 4,850 persons in 2031. Given this outlook, employment levels are not expected to increase much beyond current levels unless associated with the growth of a significant local industry.
- We note though, that coming off a low base, a small change in development or employment circumstances can have a significant impact on overall population

or job numbers. For example, the prospects of future potential natural resource projects could impact significantly on the LGA's employment prospects.

These trends are implied in our employment projections:

- As retirees are the only age cohort expected to experience a gain in population, investment in health services is vital.
- The number of people already in this age cohort, coupled with the number of people expected to transition into this bracket is a significant demographic force that will increase demand for age specific and localised services across the LGA.

Our demand projections indicate **2,630-3,560 sq.m of commercial, 1,304 sq.m of retail, 3,890–5,170 sq.m of industrial** and **870-1,150 sq.m of special use** of floorspace will be required by 2031.

Based on derived floorspace requirements and average floor space ratios, MacroPlan Dimasi estimates around **0.2 hectares of commercial, 0.3 hectares of retail, 0.6–0.9 hectares of industrial** and **0.1 hectares of special uses** land will be required by 2031.

Overall, there is sufficient land available in Gloucester LGA to accommodate future employment needs over the forecast period. Over the forecast period it is estimated:

- *Supply of business land will exceed demand by 11.7 hectares*
- *Supply of industrial land will exceed demand by 200.2 hectares*
- *Supply of special uses land will exceed demand by 1.8 hectares*

Local environmental and general development constraints such as flooding, topography and the cost of delivering services may reduce the quantum of land available for future development in the Gloucester LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Gloucester LGA.

### 16.8.2 Retail

We make the following preliminary comments in relation to retail market conditions within the Gloucester LGA:

- Gloucester LGA has a small population with low tourist visitor numbers. Future growth in the residential population and tourism visitation is expected to be modest, with retail floorspace demand estimated to grow by a little over 1,300 sq.m by 2031, equating to a land requirement of 0.3 hectares.
- Existing retail demand is estimated at more than 11,700 sq.m and we estimate the capacity of the existing business zoned land in the LGA to be about 304,260 sq.m. However because the retail offer in Gloucester is relatively small, we estimate leakage of about 40% beyond the LGA to centres such as Forster and Greater Taree, meaning net demand is about 7,000 sq.m, increasing to more than 7,800 sq.m by 2031.
- The population of the LGA is too small to trigger thresholds for additional major tenants or enclosed shopping centre floorspace.
- There is significant escape expenditure to surrounding higher order retail facilities provided in Forster and Greater Taree. This escape spending include expenditure on fashion, leisure, dds and household goods/bulky goods retailing, which cannot realistically be retained locally, given the scale of population in the municipality.
- While the LGA does not support a full range of retail formats and centre types, the community appears to be sufficiently serviced for convenience retail related items, although there will be leakage to other regions for supermarket shopping as well, given the greater range and depth on offer in Forster and Taree.

- Our preliminary analysis indicates that the existing land stock will **be sufficient to support the future retail demand growth across the LGA.**
- We recommend that future retail development activity, if there is any, be focused in the existing business zoned land, although if new formats emerge that are not suited to business zoned land, or require large land parcels, then these could be considered in alternative locations.

## Section 17: LGA Analysis – Great Lakes

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MacroPlan Dimasi was commissioned by the Department of Planning and Environment (DP&E) to undertake an employment land assessment on the Great Lakes LGA for the 2011 to 2031 period.

The objective of this research is to determine whether there is sufficiently zoned employment land 'capacity' within Great Lakes LGA given a projected rate of demand or take-up i.e. across business, industrial and special uses land use zonings.

In order to ascertain an employment land 'status' for Great Lakes LGA, the following tasks have been performed:

1. Quantified existing and proposed supply of employment land (zoned).
2. Derived employment projections (by industry).
3. Quantified demand for employment floorspace and land.
4. Market gap assessment.

The information used in this report is informed by various local and regional planning policies, Australian Bureau of Statistics (ABS) data, desktop research, DP&E population projections, DP&E land zone and floorspace ratio (FSR) planning standards, previous studies, as well as feedback from Great Lakes Council.

### 17.1 Key facts, findings and take-outs

#### 17.1.1 Population growth

- Over the five years to 2011, the resident population of Great Lakes LGA expanded by just 2,161 persons – at an average rate of 1.3% per annum.
- The greatest increase to the local population came from retirees (65+), with a net addition of 1,651 persons. This destination is popular for retirees, with

persons aged 65+ representing 30% of the local population – the highest of all North Coast LGAs.

- Between 2006 and 2011, net migration to Great Lakes LGA totalled 1,542 persons.
- DPE projections suggest the resident population of Great Lakes LGA will increase to 38,500 persons – at an average rate of 0.4% per annum out to 2031.

### 17.1.2 Employment trends

- As at 2011, the Great Lakes LGA supported 9,353 jobs, accounting for 5.2 % of the North Coast workforce.
- Retail Trade represented the largest employing industry in the LGA – it engaged 16.1% of the LGA's workforce in 2011. Health Care and Social Assistance (14.9%), Accommodation and Food Services (12.6%) and Construction (8.5%) were the next three largest employing industries.
- Over the five years to 2011, 260 new jobs were created in the Great Lakes LGA.
- In line with the North Coast region, job additions were greatest within Health Care and Social Assistance (+285 jobs).
- Eight industries registered an outright decline in workforce. Job losses was pronounced in Agriculture, Forestry and Fishing – a net job reduction of 118 jobs.

### 17.1.3 Employment land

- In Great Lakes LGA, there are 192 hectares of land zoned for urban employment purposes – comprising of 38% Business, 52% Industrial and 10% Special Uses.
- Following 260 job additions over the 2006 and 2011 period, employment in the Great Lakes LGA is projected to rise over the forecast period. Between 2011

and 2031, it is expected the workforce will expand by 685 jobs (34 per annum).

- Our estimates of demand indicate **13,250–17,670 sq.m of commercial, 18,675 sq.m of retail, 29,100–38,810 sq.m of industrial** and **11,590–15,450 sq.m of special use** floorspace will be required by 2031.
- Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates around an additional **1.3–1.8 hectares of commercial, 3.7 hectares of retail, 2.9–3.9 hectares of industrial** and **1.2–1.5 hectares of special uses** land will be required by 2031.
- Overall, there is sufficient land available in the Great Lakes LGA to accommodate future employment needs out to 2031. It is estimated:
  - *Supply of business land will exceed demand by 10.0 hectares*
  - *Supply of industrial land will exceed demand by 68.3 hectares*
  - *Supply of special uses land will exceed demand by 9.2 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Great Lakes LGA. Moreover, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.
- As a result of locational and environmental constraints, more employment land may be required in Great Lakes LGA than that suggested by our land assessment, particularly for emerging businesses and industries.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) represent a practical approach to delivering more ‘employment’ land in the Great Lakes LGA.

## 17.2 Literature review

Key studies and strategies have been reviewed for the Great Lakes LGA, including the Forster – Tuncurry Employment Land Implementation Strategy 2009 (FTELIS), and the Forster/Tuncurry Conservation & Development Strategy 2003 (FTCDS) and the Tea Gardens/Hawks Nest Conservation & Development Strategy 2003 (TGHNCDS). The FTELIS was largely informed by various previous studies including the two conservation and development strategies.

We note the following key points:

- The Employment Land Implementation Strategy focuses on employment lands in Great Lakes Shire which may be defined as land that is predominantly used for retail, commercial or industrial activities resulting in employment. Accordingly the Strategy focuses on land zoned for industrial uses, retail and commercial office uses.
- As at 2006 Census, Forster - Tuncurry generated 5,777 jobs representing 64% of all jobs in Great Lakes. The two main employment generating industries were: Retail Trade (1,038 jobs or 19% of jobs); Accommodation and Food Services (704 or 12% of jobs). The employment profile highlights the greater propensity of Forster - Tuncurry's residents to work in the retail, construction or health industry and presents the limited range of job opportunities provided in manufacturing industries and commercial businesses.
- Forster - Tuncurry provided approximately 68,750 sq.m of occupied retail floorspace and 4,380 sq.m of vacant shop front space, including 17 bulky goods premises totalling over 18,000 sq.m of floorspace.
- With respect to retail, it was found that by 2031 there would be demand for an additional 22,500 sq.m of retail floorspace. This takes into consideration existing supply, expenditure generated from tourism as well as expenditure lost/gained from surrounding areas. Forster - Tuncurry will need additional supermarket floorspace, specialty food stores, catered foods, bulky goods and department/discount department stores by 2031. It is estimated that this growth will translate into demand for an additional 19,500 sq.m of commercial



floorspace by 2031, with the main commercial category of growth being the public administration and safety sector, with the second being professional, scientific and technical services.

- The strategy concluded, given Forster - Tuncurry's location away from the Highway and rapid transport systems (such as high speed passenger and rail trains) there is no market for large standalone commercial firms, or clusters of firms (such as a Business Park) in Forster – Tuncurry.
- The Employment Land Implementation Strategy outlines Forster-Tuncurry has 54.09ha of industrial land, of which 15ha is vacant meaning that the 4-5ha additional land required to 2031 can be accommodated within existing industrial areas.
- The Strategy also identifies that a tertiary education precinct has developed north of Tuncurry and a Medical precinct within west Forster.
- The FTCDS largely informed the Employment Land Implementation Strategy in relation to industrial land availability.
- The TGHNSDCS identifies that there is available land within Myall River Downs precinct to provide around 10ha of land for retail or industrial uses.

## **17.3 Socio-demographic trends**

### **17.3.1 Population change**

- According to ABS ERP figures, the Great Lakes LGA grew by 2,161 persons over the five years to 2011, taking the total resident population to 35,737.
- This level of population growth equated to an annual gain of 433 persons.

**Table 17.1**  
**Estimated Resident Population (persons) - Great Lakes LGA**

Year	Estimated Resident Population	Total Change (persons)
2001	31,952	
2006	33,576	1,624
2011	35,737	2,161

Source: ABS

- The greatest increase to the local population came from retirees (65+), with a net addition of 1,651 persons.
- All age cohorts except upgraders (35-49) experienced a population increase over the five year period.
- The area is very popular for retirees, with persons aged 65+ representing 30% of the local population – the highest of all North Coast LGAs.

**Table 17.2**  
**Population By Age (persons) - Great Lakes LGA**

Age cohort	2006	2011	Change (2006-2011)	Composition
0-19	7,248	7,369	121	21%
20-34	3,699	3,752	53	10%
35-49	6,072	5,771	-301	16%
50-64	7,443	8,080	637	23%
65+	9,114	10,765	1,651	30%
<b>Total</b>	<b>33,576</b>	<b>35,737</b>	<b>2,161</b>	<b>100%</b>

- Given the size and recent growth in older aged cohorts, it is important that there is a sufficient capacity for health service provision.

### 17.3.2 Migration movements

Inward and outward movements for the Great Lakes LGA have been analysed, using 2006 and 2011 Census data (Place of Usual Residence).

- Over the five years to 2011, net migration into the Great Lakes LGA totalled 2,277 persons.
- Movements from Sydney provided the largest source of the net gain in migration – 1,542 persons.
- The large number of net movements from aged persons from Sydney suggests that many of these people had moved to the Great Lakes area for retirement.
- Overall, there was a net loss in migration from persons aged 20-34 (181 person), many of which moved to the Newcastle and Hunter region.

Table 17.3  
Net Migration by Age - Great Lakes LGA

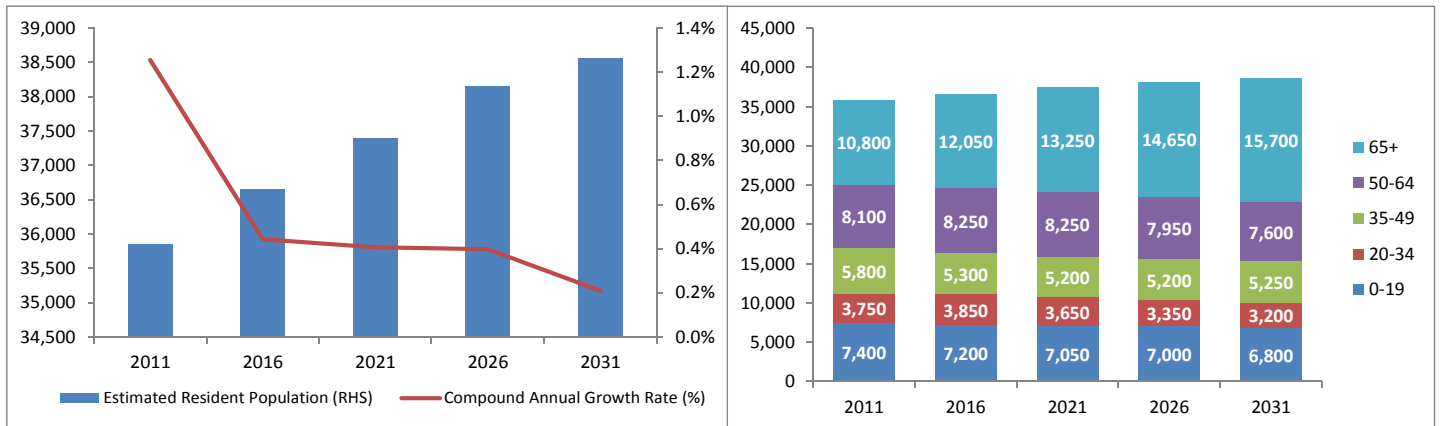
Region	0-19	20-34	35-49	50-64	65+	Total
North Coast	49	35	66	76	119	345
Sydney	173	-49	350	670	398	1,542
Regional NSW	117	-172	143	276	113	477
Interstate	-85	-78	-111	7	-77	-344
Overseas	44	83	69	48	13	257
<b>Total Net Migration</b>	<b>298</b>	<b>-181</b>	<b>517</b>	<b>1,077</b>	<b>566</b>	<b>2,277</b>

Source: ABS

### 17.3.3 Population projections

- According to the 2014 DP&E projections, the Great Lakes LGA is projected to grow to 38,500 by 2031, showing an increase of 2,750 persons (or 138 per annum) over the period.

**Figure 1. Projected Population (2011 to 2031)**



Source: DP&E, MacroPlan Dimasi

- The region's population growth is expected to be generated primarily from retirees (4,900 persons), with all other age cohorts anticipated to experience negative population growth out to 2031.

#### 17.3.4 Labour force status

- Of all residents in the Great Lakes LGA, around 85% were aged 15+.
- According to Census data, labour force participation from those aged 15 years and above was approximately 44% i.e. 12,065 of 27,372 residents<sup>16</sup>.
- Of residents in labour force, 92% were employed and 8% unemployed (and seeking working) at the time of the Census (2011).
- The employment rate for the Great Lakes LGA resembles that observed for the North Coast region (92%).

<sup>16</sup> ABS Census of Population and Housing (2011)

Age Cohort	Employed*	Unemployed**	Labour Force	Not in LF	Total
15 - 19	717	152	869	874	1,743
20 - 29	1,329	220	1,549	503	2,052
30 - 39	1,843	165	2,008	629	2,637
40 - 49	2,762	198	2,960	801	3,761
50 - 59	2,876	179	3,055	1,557	4,612
60 - 69	1,316	82	1,398	4,414	5,812
70 - 79	198	3	201	4,109	4,310
80 - 84	21	0	21	1,371	1,392
85+	4	0	4	1,049	1,053
<b>Total</b>	<b>11,066</b>	<b>999</b>	<b>12,065</b>	<b>15,307</b>	<b>27,372</b>

*Source: Census of Population and Housing (2011)*

### 17.3.5 Job containment

- Job-containment is defined as the percentage of working residents who are employed within the boundaries of the Great Lakes LGA.
- Approximately 69.1% of employed residents also worked in the LGA.
- The remaining 30.9% of working residents travel either to other North Coast LGAs (8.3%) or locations outside the North Coast (22.6%) for work.
- Of working residents who travelled to other North Coast LGAs, destinations include Greater Taree (7.3%), Gloucester (0.6%) and Port Macquarie-Hastings (0.3%).

**Table 17.5**  
**Job Containment - Great Lakes LGA**

	<b>Value</b>
Working residents	10,902
<u>Place of Work (number)</u>	
Great Lakes	7,529
North Coast LGAs (ex. Great Lakes)	904
Outside North Coast	2,469
<b>Total</b>	<b>10,902</b>
<u>Job Containment (%)</u>	
Great Lakes	69.1%
North Coast LGAs	8.3%
Other	22.6%
<b>Total</b>	<b>100.0%</b>

*Source: Census of Population and Housing (2011), MacroPlan Dimasi*

- Job containment by industry for Great Lakes LGA is presented below.
- Eleven industries achieved higher containment than the all industries average (69.1%) for the Great Lakes LGA.
- The three Industries with the highest rate of job containment in 2011 include Accommodation and Food Services (86.8%), Rental, Hiring and Real Estate Services (82.6%) Retail Trade (81.5%).

Table 17.6  
Job Containment by Industry - Great Lakes LGA

Industry	Within same LGA	Other NC LGAs	Outside NC	Total
Accommodation and Food Services	86.8%	3.7%	9.5%	100.0%
Rental, Hiring and Real Estate Services	82.6%	3.6%	13.8%	100.0%
Retail Trade	81.5%	7.0%	11.6%	100.0%
Arts and Recreation Services	78.1%	8.1%	13.8%	100.0%
Electricity, Gas, Water and Waste Services	73.5%	11.0%	15.5%	100.0%
Agriculture, Forestry and Fishing	73.0%	3.9%	23.1%	100.0%
Health Care and Social Assistance	72.6%	12.5%	14.9%	100.0%
Professional, Scientific and Technical Services	70.9%	6.1%	23.0%	100.0%
Other Services	70.3%	6.8%	22.9%	100.0%
Education and Training	70.1%	13.9%	15.9%	100.0%
Financial and Insurance Services	69.8%	10.1%	20.1%	100.0%
<b>Across all industries</b>	<b>69.1%</b>	<b>8.3%</b>	<b>22.6%</b>	<b>100.0%</b>
Information Media and Telecommunications	65.9%	9.8%	24.4%	100.0%
Public Administration and Safety	65.5%	12.5%	22.0%	100.0%
Wholesale Trade	59.0%	5.0%	36.0%	100.0%
Administrative and Support Services	58.3%	5.3%	36.4%	100.0%
Manufacturing	52.1%	14.4%	33.5%	100.0%
Transport, Postal and Warehousing	51.8%	9.7%	38.4%	100.0%
Construction	50.4%	3.6%	46.0%	100.0%
Mining	29.3%	17.7%	53.0%	100.0%

Source: Census of Population and Housing (2011), MacroPlan Dimasi

## 17.4 Employment and labour market trends

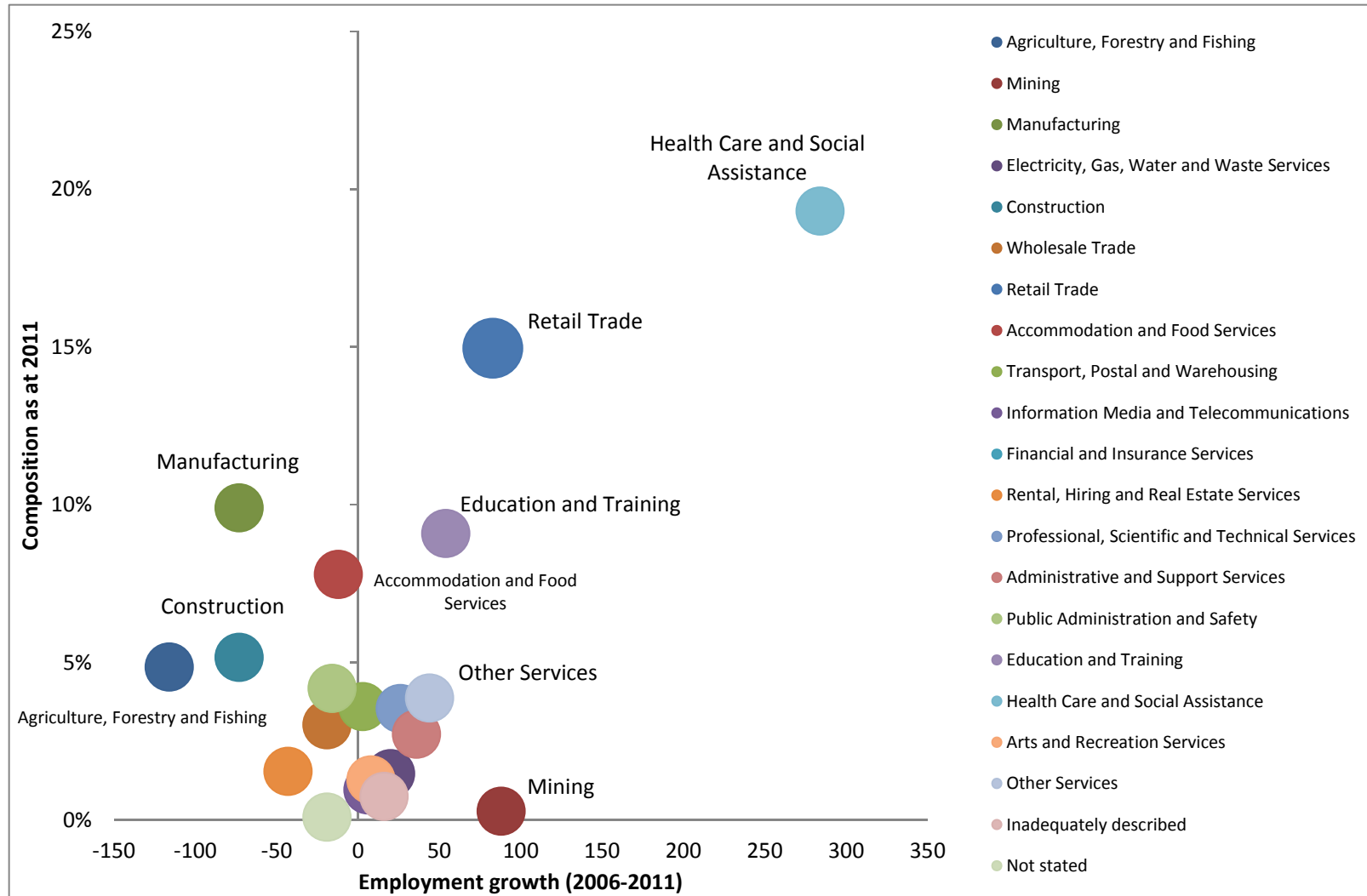
### 17.4.1 Industry composition

- The purpose of this analysis is to generate an employment profile for the Great Lakes LGA and identify emerging trends and drivers that have 'shaped' its workforce over the five years to 2011.
- Our analysis of employment trends focuses on jobs within the LGA rather than on 'working residents' living within the LGA. This is because demand for employment land is supported by jobs and not working residents.
- As at 2011, the Great Lakes LGA supported 9,353 jobs, accounting for just 5.2% of total jobs in the North Coast (NC) region.
- Retail Trade represented the largest employing industry in the LGA – it engaged 16.1% of the LGA's workforce in 2011. Health Care and Social Assistance (14.9%), Accommodation and Food Services (12.6%) and Construction (8.5%) were the next three largest employing industries.

- The composition of persons employed within traditional value-add industries such as Agriculture, Forestry and Fishing, Construction and Manufacturing is modest, accounting for just over 17% of total jobs. On the other hand, representation from white-collar industries is on par with the North Coast average.
- Over the five years to 2011, 260 new jobs were created in the Great Lakes LGA.
- In line with the North Coast region and national employment growth, job additions were greatest within Health Care and Social Assistance (+285 jobs).
- Eight industries registered an outright decline in workforce. The number of jobs shed was greatest in the Agriculture, Forestry and Fishing industry – a net job reduction of 118 jobs.
- While it is the third largest employing industry, Accommodation and Food Services experienced a slight decline over the five year period (-12 jobs)
- At its current rate of growth, the Health Care & Social Assistance sector is projected to eclipse the Retail Trade sector as the largest employed in Great Lakes LGA.



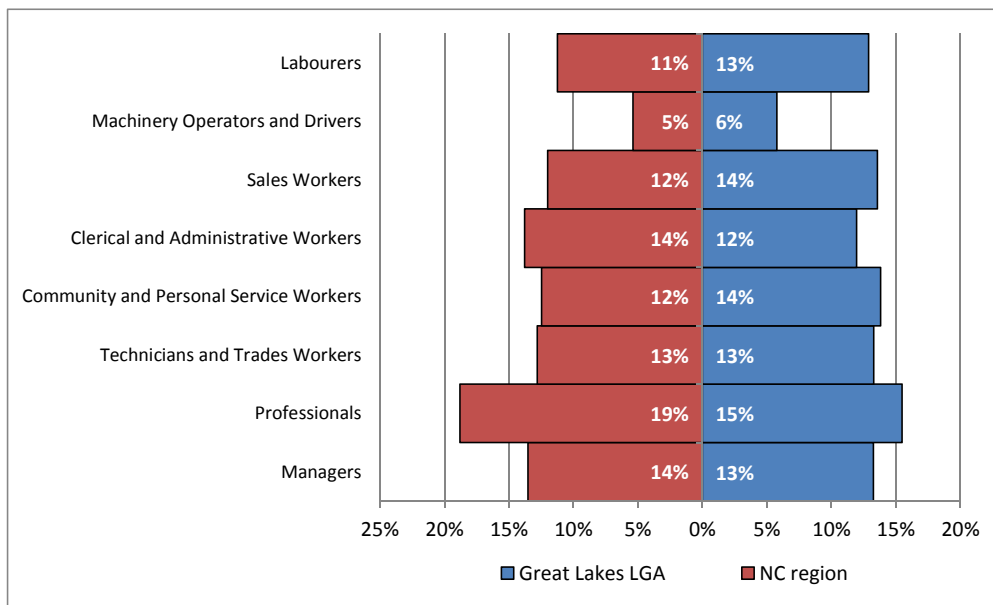
Figure 2. Employment composition and growth by industry, Great Lakes LGA



### 17.4.2 Occupation profile

- As at Census 2011, the occupation profile of the Great Lakes LGA was spread evenly with the majority of occupations accounting for between 12-15% of jobs – with the exception of Machinery Operators and Drivers (6%).
- Persons employed in a 'Professional' capacity represented the majority of jobs (15%).

**Figure 3. Occupation Composition (2011)**



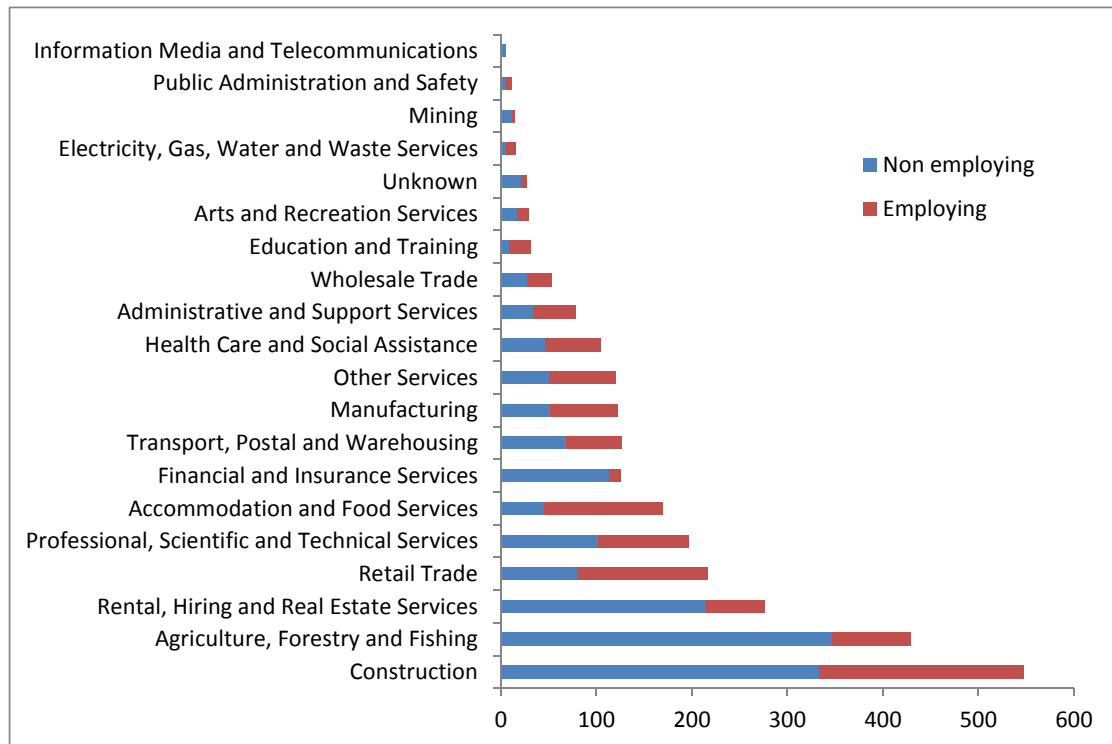
Source: Census 2011, MacroPlan Dimasi

### 17.4.3 Business composition & change

- As at June 2011, there were 2,705 businesses operating within the Great Lakes LGA with 59% being non employing/sole trading businesses.
- By industry, business numbers were greatest within the Construction industry (548), followed by Agriculture, Forestry and Fishing (429) and Rental, Hiring and Real Estate Services (276).
- Of businesses that employ, the largest two industries are Construction (214 in total) followed by Retail Trade (136 in total).

- At June 2011, there were 3 businesses employing 200 or more persons within the Great Lakes LGA – all of which are within Electricity, Gas, Water and Waste Services.

**Figure 4. Change in Business Count by Industry (2006-2011)**



Source: ABS, MacroPlan Dimasi

- Over the 2009 to 2011 period, the number of businesses operating within the Great Lakes LGA contracted by 139. The loss in operating businesses was largest within non employing businesses (-95)
- Business growth over the period was most pronounced within Accommodation and Food Services (+9), Information Media and Telecommunications (+9) and Health Care and Social Assistance (+8).
- Conversely, the loss in business numbers was greatest within Administrative and Support Services (-34) and Construction (-34).

Table 17.7  
Business Composition and Change - Great Lakes LGA

Industry	Change in non employing businesses (2009-2011)	Change in employing businesses (2009-2011)	Total change in businesses (2009-2011)
Health Care and Social Assistance	0	8	8
Retail Trade	-8	-17	-25
Accommodation and Food Services	7	2	9
Education and Training	-3	3	0
Construction	-19	-4	-23
Public Administration and Safety	0	-6	-6
Manufacturing	0	-6	-6
Professional, Scientific and Technical Services	-3	0	-3
Other Services	-2	5	3
Transport, Postal and Warehousing	-16	0	-16
Agriculture, Forestry and Fishing	-3	-9	-12
Administrative and Support Services	-25	-9	-34
Wholesale Trade	-7	6	-1
Rental, Hiring and Real Estate Services	-4	-5	-9
Financial and Insurance Services	3	-18	-15
Arts and Recreation Services	-9	-3	-12
Electricity, Gas, Water and Waste Services	-3	0	-3
Information Media and Telecommunications	6	3	9
Mining	-6	3	-3
Not Classified	-3	3	0
<b>Total</b>	<b>-95</b>	<b>-44</b>	<b>-139</b>

Source: ABS

#### 17.4.4 Employment implications

The above assessment of employment trends and characteristics suggest the following:

- Given the Great Lakes proximity to the larger centres of Newcastle and Greater Taree, there is a relatively high leakage of workers. Containment of these workers will be key to supplementing the retirement of the workforce over the next 20 years.
- Employment within the Great Lakes has a heavily reliance on the tourism sector, evident by the high representation of persons employed within Retail Trade and Accommodation and Food Services.
- Over the past five years, there has been a reduction in jobs (6 persons) within the Manufacturing industry, consistent with the broader NC region. We expect conditions within the Manufacturing sector to remain weak.

- Although it employs almost 15% of the Great Lakes workforce, a greater emphasis should be placed on Health Care and Social Assistance as 53% of persons are aged 50 or above – the highest of any North Coast LGA. The high representation of aged persons will only become more pronounced which will place further strain on existing medical facilities within the LGA.

## **17.5 Employment Land Supply**

### **17.5.1 Zoned Urban Employment Land**

- Using GIS layers issued by the Department of Planning and Environment (July 2014 edition), MacroPlan Dimasi has obtained the current stock of zoned land in the Great Lakes LGA.
- The information presented in this section is in accordance with the Great Lakes Local Environmental Plan 2014.
- In the Great Lakes LGA, there are three employment land use categories, including Business, Industrial and Special Uses.
- The table below presents the full complement of urban employment land use zones, as well as the area of land assigned to each land zone type.

<b>Classification</b>	<b>Land Use Zone</b>	<b>Area (ha)</b>	<b>%</b>
Business	B1. Neighbourhood Centre	8.1	4%
	B2. Local Centre	39.0	20%
	B4. Mixed Use	22.9	12%
	B5. Business Development	3.4	2%
	<b>Total</b>	<b>73.3</b>	<b>38%</b>
Industrial	IN1. General Industrial	18.7	10%
	IN2. Light Industrial	73.1	38%
	IN4. Working waterfront	8.2	4%
	<b>Total</b>	<b>100.0</b>	<b>52%</b>
Special Uses	SP2. Infrastructure	2.5	1%
	SP3. Tourist	16.4	9%
	<b>Total</b>	<b>18.9</b>	<b>10%</b>
<b>Employment</b>	<b>Total Urban</b>	<b>192.2</b>	<b>100%</b>

*Source: NSW Department of Planning and Environment (2014)*

- Overall, there are 192.2 hectares of zoned urban employment land in the Great Lakes LGA.
- It is estimated there are approximately 100 hectares of land zoned for industrial purposes (52%), 73 hectares for Business (38%) and 19 hectares for Special Uses (10%).
- Within the four designated business zones (B1, B2, B4, and B5), there is 39.0 hectares assigned to B2 Local Centre and 22.9 hectares to B4 Mixed Use.












# Map 17.1

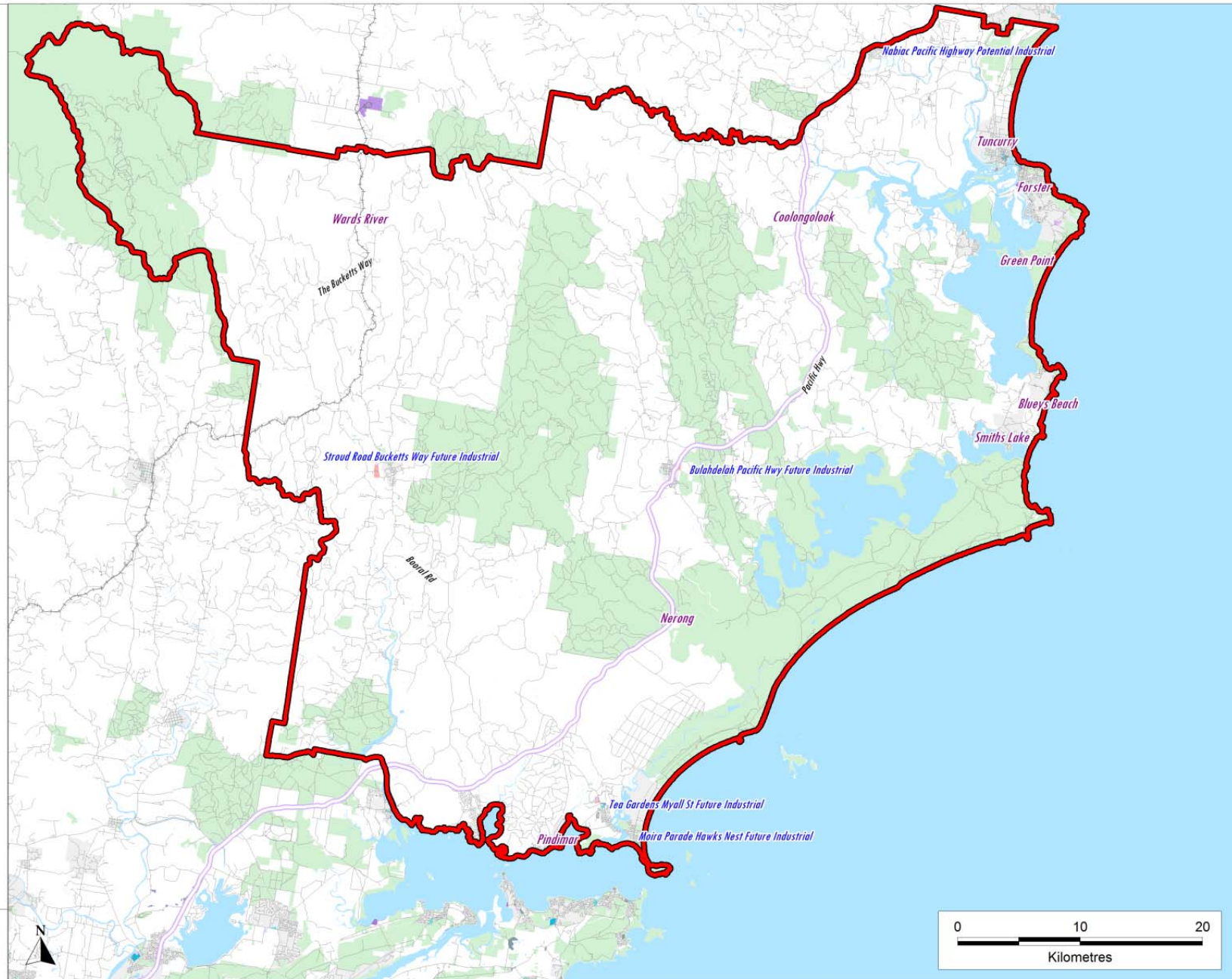
## Great Lakes Council Employment Land Zones

### Legend \*

 Great Lakes Council Boundary

### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4
-  Proposed Industrial Precincts





# Map 17.2

## Forster

### Employment Land Zones

#### Legend \*

##### Land Zones

- B1
- B2
- B3
- B4
- B5
- B6
- B7
- IN1
- IN2
- IN3
- IN4
- Proposed Industrial Precincts





### 17.5.2 Industrial – Existing supply

- Three industrial land use zones are used in the Great Lakes LGA i.e. IN1 General Industrial, IN2 Light Industrial and IN4 Working Waterfront.
- Our review has identified five active precincts for the Great Lakes LGA with regard for the Mid North Coast Regional Strategy.

**Table 17.9**  
Established Industrial Precincts - Great Lakes LGA

Name	Total Area (hectares)	Developed (hectares)	Developed (%)
Tuncurry Industrial Precinct	30.0	22.0	73%
Forster Central	23.0	21.3	93%
Sweet Pea Road Industrial Precinct	20.0	0.0	0%
Tea Gardens Industrial Precinct	15.0	11.0	73%
Forster Working Waterfront	5.0	4.0	80%
<b>Total</b>	<b>93.0</b>	<b>58.3</b>	<b>63%</b>

Source: MacroPlan Dimasi

Key findings pertinent to existing precincts include:

- Existing precincts occupy around 93.0 hectares of zoned industrial land.
- The **Sweet Pea Road Industrial Precinct** is located approximately 5km south east of Forster, and falls outside the perimeter of the town and surrounds.
- **Forster Central** (zoned Light Industrial) is located adjacent to the Forster Central Business District. Through Kularoo Drive, the precinct has access to the Pacific Highway, and more importantly key trade regional locations along the Mid North and Far North Coast. Existing uses at this precinct comprise a number of light industrial businesses including John Fletchers Trucks Centre, Pongrac Upholstery, Boona Mini Storage, Booral Great Lakes Bricks, Shoreline Trimming, P & J McNamara Pty Ltd, Forster Glass & Aluminium, Forster Bus Co, Ready Mix Concrete and the Water Filter Co.

- Of the total, it is estimated that around 58.3 hectares or 63% of this land is developed. Assuming that there are no constraints, it is estimated there is approximately 34.7 hectares of zoned land available for future development.
- At an observed floor space ratio of 1:1 for industrial uses (IN1, IN2 and IN4) in the Great Lakes LGA, this equates to approximately 34.7 hectares of industrial floorspace.

### 17.5.3 Industrial – Future supply

- Spread across five precincts, approximately 37 hectares of future industrial land has been identified.
- A summary of land areas and potential delivery times is presented in the next table.

**Table 17.10**

**Future Industrial Precincts - Great Lakes LGA**

<b>Name</b>	<b>Total Area (hectares)</b>	<b>Timing (Years)</b>
Tea Gardens Myall St	17.4	1 - 10
Bulahdelah Pacific Highway	5.8	10 - 20
Nabiac Pacific Hwy	5.0	10 - 20
Stroud Road Bucketts Way	4.8	10 - 20
Moira Parade Industrial Precinct	4.0	10 - 20
<b>Total</b>	<b>37.0</b>	

*Source: MacroPlan Dimasi*

- The Tea Garden precinct comprises the largest share of future industrial land (17.4 hectares). According to the Mid North Coast Regional Strategy 2006 to 2031, a significant amount of land along Myall Street has been identified for future industrial uses.
- The Great Lakes Council has identified Moira Parade, Hawks Nest as a location for a marina, zoned IN4 Working Waterfront. Uses associated with this development include a fish and tackle shop, boardwalk, boat supplies as well as a ferry wharf.

#### 17.5.4 Retail & Commercial – Existing supply

The Great Lakes Shire LGA retail/commercial centres and bulky/homemaker retail provisions are outlined on Map 17.3 and Map 17.4.

- The Great Lakes LGA centres hierarchy generally consists of the following structure:
  - Forster – Tuncurry Regional Centre
  - Other centres/villages (such as Boomerang/Blueys, Hawks Nest and Tea Gardens)

#### **Forster – Tuncurry Regional Centre**

- Forster – Tuncurry is the major retail, commercial, leisure, tourism, administrative and health centre for the Great Lakes LGA. It is one of six Major Towns in the Mid North Coast Region.
- The Forster – Tuncurry Regional Centre occupies around 51.2 ha of business zoned land, including the 0.3 ha of B1 zoned land, 31.6 ha of B2 zoned land, 15.8 ha of B4 zoned land and 3.4 ha of B5 zoned land. There are two town centres, one located on both sides of the Forster – Tuncurry Bridge. The Tuncurry Town Centre is oriented along Manning Street (The Lakes Way), whereas the Forster Town Centre is focused on Wharf Street (The Lakes Way). The Lakes Way is one of the main thoroughfares through the Great Lakes LGA. In total, the Forster – Tuncurry Regional Centre (i.e. the two town centres combined) is estimated to provide approximately 65,000-75,000 sq.m of retail floorspace and about 5,000–6,000 sq.m of non-retail commercial/shopfront floorspace.
- The Forster Town Centre provides the majority of retail floorspace within Forster (Tuncurry), anchored by Stockland Forster Shopping Centre, a sub-regional centre anchored by Kmart and Target Country discount department stores, as well as Woolworths, Coles and Aldi supermarkets. The centre also provides several mini-major tenants including The Reject Shop and a large

pharmacy, as well as providing a range of supporting specialty retail including food retailers, food catering, and apparel and retail service providers.

- The Tuncurry Town Centre incorporates a stand-alone Woolworths supermarket and a substantial provision of strip retail/non-retail floorspace, as well as some 15,000–25,000 sq.m of bulky goods floorspace.

### **Other centres/villages**

There are several retail centres and villages distributed elsewhere across the LGA, that generally support small scale convenience retail and commercial facilities, primarily serving their immediate local catchments. These include:

- Boomerang/Blueys: Is a small village located to the south of Forster – Tuncurry, providing around 10 shops including a newsagent and mini-mart, as well as a bakery, a pharmacy, a bottle shop, apparel retailer and a couple of cafes. In total this village is estimated to provide a total of approximately 750–1,000 sq.m of retail floorspace, however Council recently rezoned a 5,000 sq.m site located opposite the centre to B1, meaning further retail facilities could be developed in the near future.
- Tea Gardens: Is a relatively well established village that includes the Myall Quays Shopping Centre, anchored by a full-line Coles supermarket (previously a Bi Lo supermarket), as well as a reasonable provision of supporting specialty retail and non-retail floorspace. In total, Tea Gardens is estimated to provide between 6,000–7,000 sq.m of retail floorspace.
- Hawks Nest: Is a small village that was anchored by a small Friendly Grocer supermarket, which is currently vacant, as well as several retail/commercial tenants including a discount variety store, apparel store, bakery, butcher, a newsagency and pharmacy, as well as a couple of cafés/restaurants. In total, Hawks Nest is estimated to provide between 1,500–2,500 sq.m of retail floorspace. Council has developed a preliminary land use plan for Hawks Nest, creating specialised retail/commercial precincts including a marina, a rejuvenated neighbourhood centre and a commercial area with a tourism focus near the main beach.

- Other centres: There are a range of smaller villages scattered throughout the Great Lakes LGA primarily providing strip retail typical of regional locations. The more significant of these smaller villages includes the Pacific Palms Shops, and IGA supermarket anchored convenience centres at Nabiac and Bulahdelah, although these centres primarily serve the convenience needs of local catchments. These centres are not located on business zoned land.

# Map 17.3












## Great Lakes Council

### Retail Provision

#### Legend \*

-  Great Lakes Council Boundary

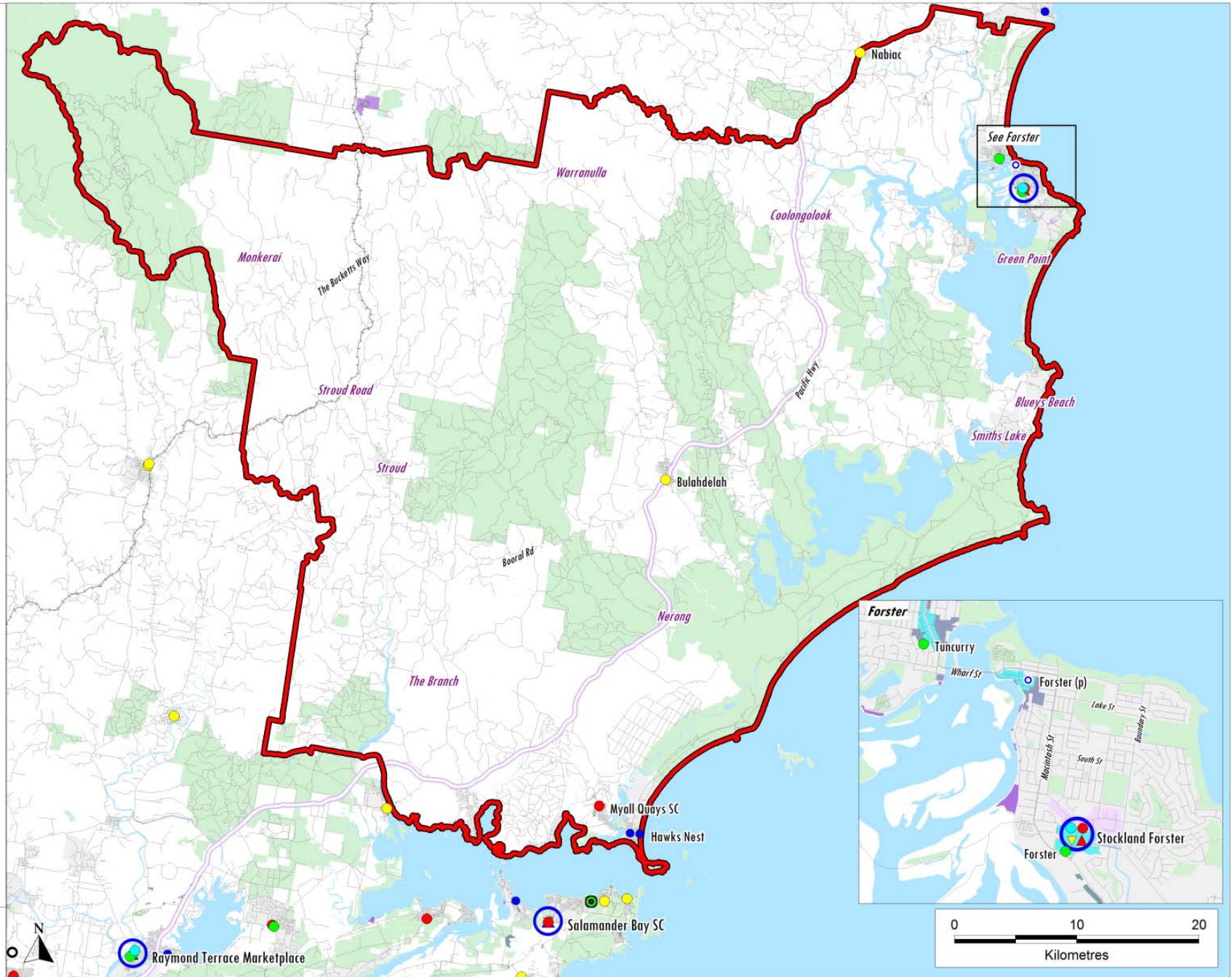
#### Land Zones

-  B1
-  B2
-  B3
-  B4
-  B5
-  B6
-  B7
-  IN1
-  IN2
-  IN3
-  IN4

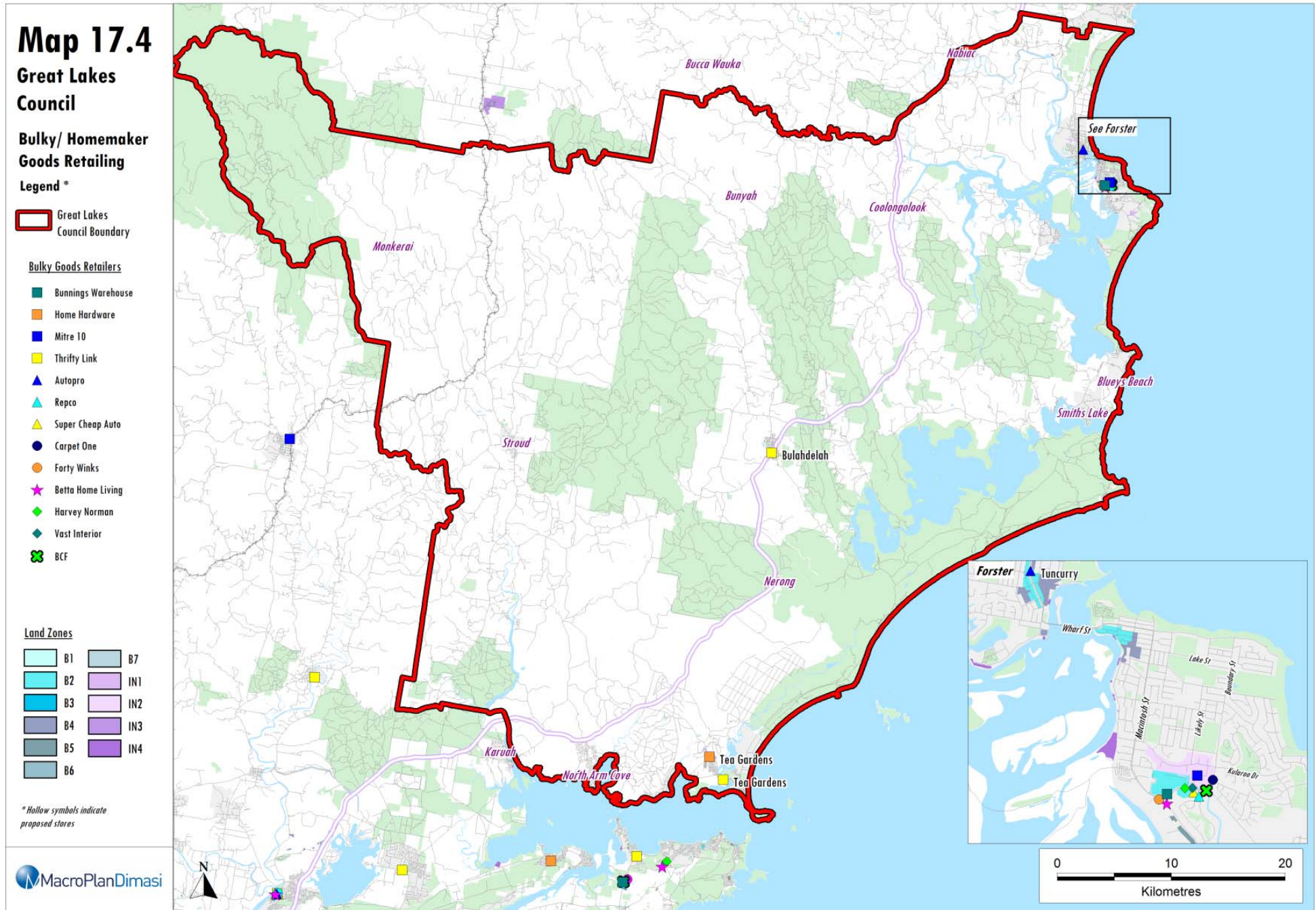
#### Retail Competition

-  Sub-Regional Centre
-  Kmart
-  Target Country
-  Woolworths
-  Coles/Bi-Lo
-  Aldi
-  Supa IGA / IGA
-  Other Smkt (inc. Foodworks, IGA Express etc.)
-  Potential Smkt

\* Hollow symbols indicate proposed stores







### **Business zoned land capacity for retail and commercial development**

Table 17.11 presents an overview of the existing business zoned land supply across the LGA and the capacity of this land supply to accommodate retail and commercial floorspace.

- In total, there are approximately **73.3 ha of business zoned land**, including 8.1 ha of B1 zoned land, 39.0 ha of B2 zoned land, 22.9 ha of B4 zoned land and 3.4 ha of B5 zoned land.
- In regional locations B1, B2 and B3 zoned land generally accommodates most of the retail floorspace.
- We have applied FSRs for each business zone type from the Great Lakes LEP 2014 and for sites where FSRs are not provided. We have relied on an average FSR for these zone types across the North Coast region.
- Having regard to the above, we estimate the indicative retail/commercial floorspace capacity of existing business zones in the Great Lakes LGA to be in the order of 938,210 sq.m.
- We estimate that there is net leakage from the LGA in the order of about 20%, given the relatively limited provision of higher order retail facilities. In order to gain an understanding of the suitability, and capacity, of the current provision of business zoned land to meet future demand we have compared the estimated 'net retail demand' now, and in 2031. It has been estimated 5.3 hectares of business zoned land will be required over the forecast period.



**Table 17.11**  
Great Lakes LGA - Business zoned land capacity (sq.m)

	Area (ha)	FSR	Total (sq.m)
<u>By Zone</u>			
Total B1	8.1	1.0	81,060
Total B2*	39.0	1.2	448,061
Total B4	22.9	1.6	375,520
Total B5	<u>3.4</u>	<u>1.0</u>	<u>33,568</u>
<b>Total LGA</b>	<b>73.3</b>		<b>938,210</b>

*\*NSW North Coast region average for zone type  
Source: MapInfo; NSW Govt; MacroPlan Dimasi*

### 17.5.5 Retail & Commercial – Future supply

Development approval has been given for a 2,240 sq.m retail development on Wallis Street in Forster, the centre is proposed to include an 800 sq.m supermarket and is currently for sale.

### 17.5.6 Special Uses – Existing supply

- As per the Great Lakes LEP 2014, the LGA has two land use zones associated with the category 'special use'; SP2 Infrastructure and SP3 Tourist.
- Classified roads, sewerage systems, waste management facilities, water supply systems and other miscellaneous uses have been removed from our estimates of urban employment land for this category.
- This Special Uses category encompasses a total of 18.9 hectares, of which 16.4 hectares is dedicated to tourism related activities (i.e. Riverside and North Shearwater) and 2.5 hectares for hospitals (SP2). The Riverside SP3 precinct currently comprises of undeveloped land. The land zoned SP3 in North Shearwater is occupied by 'Club Forster'.
- The largest allocation (1.3 hectares) for 'hospital' purposes is the Forster Private Hospital. Of the total allocation, it is estimated 0.96 hectares is developed and 0.34 hectares is available for future development. Located on

South Street, this hospital provides acute medical, surgical and rehabilitation services, primarily to the people of the Great Lakes.

**Figure 5. Satellite Image of Forster Private Hospital**



*Source: SIX maps (NSW Department of Planning and Environment)*

### 17.5.7 Special Uses – Future supply

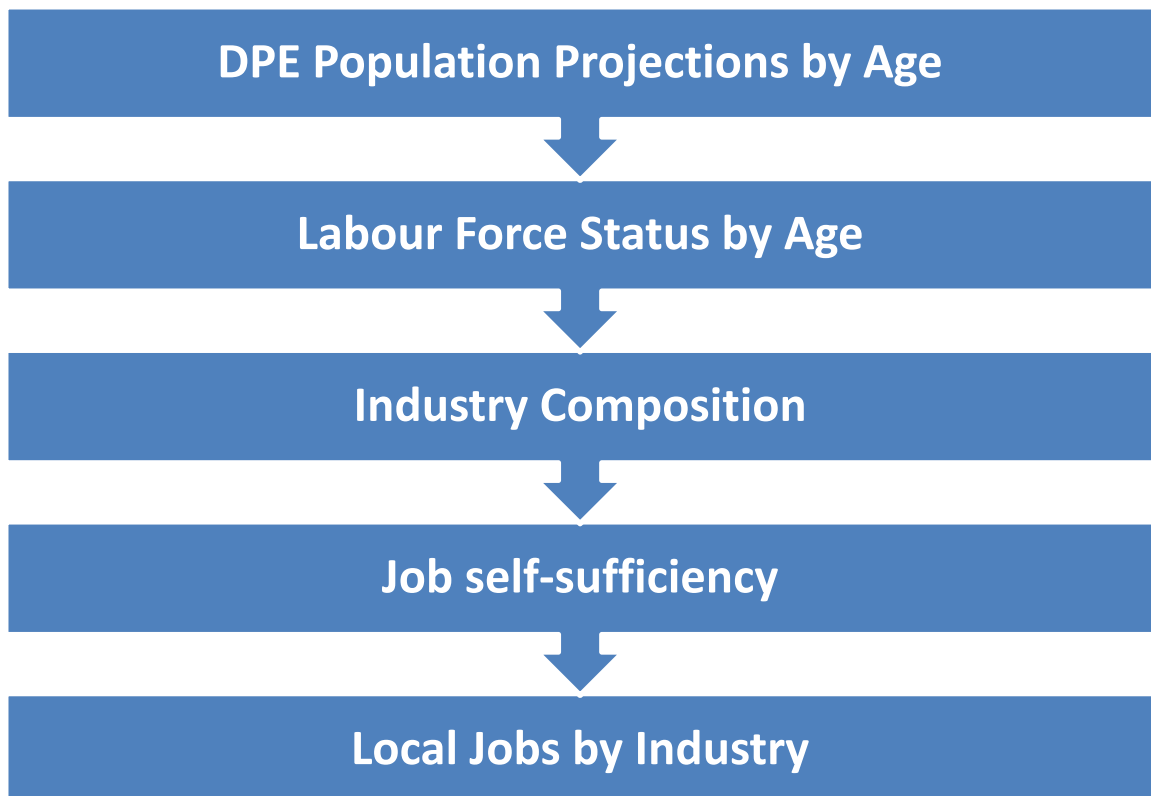
- There are no upgrades or redevelopment projects proposed for the Great Lakes within the Special Use category of zoning.

## 17.6 Demand for employment land

### 17.6.1 Methodology

- In order to ascertain the quantity of commercial, industrial and special use land required, we first generate employment projections for the Great Lakes LGA.

- These projections consider the anticipated demographic and labour market profile of future residents, as well as the ability of industry in Great Lakes LGA to generate employment.
- Informed by trends on employment and industry growth (i.e. investment), with greater weighting behind the most recent five year period, an outlook on future economic and market conditions is implied in these projections.
- The flowchart below depicts the process used to derive employment forecasts for the Great Lakes LGA.



- From these employment projections, we then derive the quantum of floorspace required over the period out to 2031 by:
  - Converting jobs by industry into specific built form types
  - Applying indicative employment densities

- Finally, through observed or weighted average FSRs, we calculate the amount of land required for each land use type.
- Demand for retail floorspace is derived using an alternative approach.

### 17.6.2 Employment Projections

- Following 260 job additions over the 2006 and 2011 period, employment in the Great Lakes LGA is projected to rise over the forecast period. Between 2011 and 2031, it is expected the workforce will expand by 685 jobs (34 per annum).
- Over the decade to 2021, our employment projections imply an additional 323 jobs for the Great Lakes LGA. As at 2021, the LGA is projected to support 9,676 jobs.
- By 2031, employment in the LGA is expected to expand further to 10,038, which represents growth of 362 jobs since 2021.
- By industry, employment growth is expected to be most pronounced within Health Care and Social Assistance (+190), Accommodation and Food Services (+182), Education and Training (+115) and Retail Trade (+87),
- Five industries are anticipated to incur job losses, particularly in traditional industries such as Agriculture, Forestry and Fishing (-70) and Manufacturing (-65).

**Table 17.12**  
**Employment by Industry - Great Lakes LGA (2011, 2021, 2031)**

Industry	2011	2021	2031	Change (2011-2031)
Health Care and Social Assistance	1,396	1,500	1,586	190
Accommodation and Food Services	1,183	1,297	1,365	182
Education and Training	748	823	863	115
Retail Trade	1,509	1,520	1,596	87
Construction	791	823	853	62
Other Services	403	436	462	59
Electricity, Gas, Water and Waste Services	192	219	248	56
Transport, Postal and Warehousing	264	300	311	47
Professional, Scientific and Technical Services	363	387	402	39
Wholesale Trade	147	176	176	29
Administrative and Support Services	247	257	276	29
Financial and Insurance Services	141	159	165	24
Mining	125	139	144	19
Rental, Hiring and Real Estate Services	241	252	251	10
Information Media and Telecommunications	68	58	60	-8
Public Administration and Safety	445	436	432	-13
Arts and Recreation Services	199	209	177	-22
Manufacturing	436	387	371	-65
Agriculture, Forestry and Fishing	371	300	301	-70
Other*	84	0	0	-84
<b>Total</b>	<b>9,353</b>	<b>9,676</b>	<b>10,038</b>	<b>685</b>

\* Other includes inadequately described or not stated  
Source: ABS, MacroPlan Dimasi

- We now categorise these projections according to the type of built form required by each industry.
- The following table presents the concordance used to convert ABS ANSZIC employment industry figures into land use type.

**Table 17.13**  
Industry and Land Use Conversion Matrix - Great Lakes LGA

Industry	Non-urban	Commercial/ business	Industrial	Special Uses	Total
Agriculture, Forestry and Fishing	100%	0%	0%	0%	100%
Mining	90%	0%	10%	0%	100%
Manufacturing	0%	0%	100%	0%	100%
Electricity, Gas, Water and Waste Services	0%	10%	90%	0%	100%
Construction	0%	10%	90%	0%	100%
Wholesale Trade	0%	80%	20%	0%	100%
Retail Trade	0%	95%	5%	0%	100%
Accommodation and Food Services	0%	70%	30%	0%	100%
Transport, Postal and Warehousing	0%	20%	80%	0%	100%
Information Media and Telecommunications	0%	100%	0%	0%	100%
Financial and Insurance Services	0%	100%	0%	0%	100%
Rental, Hiring and Real Estate Services	0%	100%	0%	0%	100%
Professional, Scientific and Technical Services	0%	100%	0%	0%	100%
Administrative and Support Services	0%	100%	0%	0%	100%
Public Administration and Safety	0%	100%	0%	0%	100%
Education and Training	0%	10%	0%	90%	100%
Health Care and Social Assistance	0%	10%	0%	90%	100%
Arts and Recreation Services	0%	100%	0%	0%	100%
Other Services	0%	100%	0%	0%	100%

*Source: MacroPlan Dimasi*

- From these ratios, we derive employment projections by land use, as presented in the following table.

**Table 17.14**  
Employment Additions by Land Use Type - Great Lakes LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	1	1	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	3	3	25	25	0	0
Construction	3	3	28	28	0	0
Wholesale Trade	24	0	6	0	0	0
Retail Trade	11	72	1	4	0	0
Accommodation and Food Services	80	48	34	20	0	0
Transport, Postal and Warehousing	7	2	29	9	0	0
Information Media and Telecommunications	0	2	0	0	0	0
Financial and Insurance Services	18	6	0	0	0	0
Rental, Hiring and Real Estate Services	11	0	0	0	0	0
Professional, Scientific and Technical Services	24	14	0	0	0	0
Administrative and Support Services	10	20	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	7	4	0	0	67	37
Health Care and Social Assistance	10	9	0	0	94	77
Arts and Recreation Services	10	0	0	0	0	0
Other Services	33	26	0	0	0	0

*Note: These figures may be subject to rounding*  
*Source: MacroPlan Dimasi*

### 17.6.3 Employment Floorspace Demand

- MacroPlan Dimasi has prepared two floorspace demand scenarios. Each scenario portrays varying degrees of interaction between new jobs and additional floorspace requirements.
- Indicative employment densities are applied to employment by industry projections to derive the quantum of future floorspace required in the Great Lakes LGA (presented in Table 17.15)

**Table 17.15**

**Indicative Employment Density by Industry and Land Use Type - Great Lakes LGA**

Industry	Non-urban	Commercial/ business	Industrial	Special Uses
Agriculture, Forestry and Fishing	0	0	0	0
Mining	0	0	200	0
Manufacturing	0	0	250	0
Electricity, Gas, Water and Waste Services	0	40	250	0
Construction	0	30	150	0
Wholesale Trade	0	30	200	0
Retail Trade	0	40	140	0
Accommodation and Food Services	0	50	150	0
Transport, Postal and Warehousing	0	30	200	0
Information Media and Telecommunications	0	30	350	0
Financial and Insurance Services	0	25	0	0
Rental, Hiring and Real Estate Services	0	25	0	0
Professional, Scientific and Technical Services	0	25	0	0
Administrative and Support Services	0	25	0	0
Public Administration and Safety	0	25	0	0
Education and Training	0	40	0	50
Health Care and Social Assistance	0	40	0	60
Arts and Recreation Services	0	40	0	0
Other Services	0	40	0	0

Source: MacroPlan Dimasi

- The first scenario (Base Case) assumes a 'one-for-one' relationship exists between new jobs and indicative floorspace need. That is, every new job results in additional floorspace demand (equivalent to the indicative employment density for that particular industry). Results for this scenario are presented in the following table.



**Table 17.16**  
**Additional Floorspace by Industry under the Base Scenario (sqm) - Great Lakes LGA**

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	280	100	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	110	110	6,160	6,350	0	0
Construction	90	90	4,270	4,130	0	0
Wholesale Trade	710	0	1,180	0	0	0
Retail Trade	420	2,880	80	530	0	0
Accommodation and Food Services	3,990	2,390	5,120	3,070	0	0
Transport, Postal and Warehousing	220	70	5,760	1,780	0	0
Information Media and Telecommunications	0	60	0	0	0	0
Financial and Insurance Services	450	150	0	0	0	0
Rental, Hiring and Real Estate Services	270	0	0	0	0	0
Professional, Scientific and Technical Services	600	360	0	0	0	0
Administrative and Support Services	240	490	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	300	160	0	0	3,360	1,830
Health Care and Social Assistance	420	340	0	0	5,620	4,640
Arts and Recreation Services	400	0	0	0	0	0
Other Services	1,300	1,050	0	0	0	0
<b>Total</b>	<b>9,520</b>	<b>8,150</b>	<b>22,850</b>	<b>15,960</b>	<b>8,980</b>	<b>6,470</b>

Source: MacroPlan Dimasi

- Under the Base Case, it is estimated approximately **9,520 sq.m of commercial, 22,850 sq.m of industrial and 8,980 sq.m of special use** floorspace will be required by 2021.
- Between 2021 and 2031, demand for approximately **8,150 sq.m of commercial, 15,960 sq.m of industrial and 6,470 sq.m of special uses** floorspace is expected to arise under the Base Case.
- The 'Alternative' scenario presents a situation by which a *diluted* floorspace addition results from new employment.
- Under this scenario, each new job is assumed to result in a floorspace addition equivalent to 75% of the prescribed employment density. By implication, it presumes a proportion of new jobs will be absorbed through greater utilisation of existing premises. Results are presented in Table 17.17.



- The rationale behind the diluted scenario is logical. It considers the situation in which an additional worker is 'absorbed' within an existing floorplate. In effect, demand for floorspace remains unchanged.
- MacroPlan Dimasi considers the diluted scenario a better depiction of likely actions and decisions made by businesses.

**Table 17.17**  
Additional Floorspace by Industry under the Alternative Scenario (sqm) - Great Lakes LGA

Industry	Commercial/business		Industrial		Special Uses	
	2021	2031	2021	2031	2021	2031
Agriculture, Forestry and Fishing	0	0	0	0	0	0
Mining	0	0	210	80	0	0
Manufacturing	0	0	0	0	0	0
Electricity, Gas, Water and Waste Services	80	80	4,620	4,760	0	0
Construction	70	70	3,200	3,090	0	0
Wholesale Trade	530	0	880	0	0	0
Retail Trade	320	2,160	60	400	0	0
Accommodation and Food Services	2,990	1,790	3,840	2,300	0	0
Transport, Postal and Warehousing	160	50	4,320	1,340	0	0
Information Media and Telecommunications	0	50	0	0	0	0
Financial and Insurance Services	340	110	0	0	0	0
Rental, Hiring and Real Estate Services	200	0	0	0	0	0
Professional, Scientific and Technical Services	450	270	0	0	0	0
Administrative and Support Services	180	370	0	0	0	0
Public Administration and Safety	0	0	0	0	0	0
Education and Training	220	120	0	0	2,520	1,370
Health Care and Social Assistance	310	260	0	0	4,220	3,480
Arts and Recreation Services	300	0	0	0	0	0
Other Services	980	790	0	0	0	0
<b>Total</b>	<b>7,130</b>	<b>6,120</b>	<b>17,130</b>	<b>11,970</b>	<b>6,740</b>	<b>4,850</b>

Source: MacroPlan Dimasi

- Under the Alternative scenario, it is estimated **7,130 sq.m of commercial, 17,130 sq.m of industrial** and **6,740 sq.m of special use** floorspace will be required by 2021.
- Over the following ten years to 2031, an additional **6,120 sq.m of commercial, 11,970 sq.m of industrial** and **4,850 sq.m of special uses** floorspace is expected to materialise.

#### 17.6.4 Demand for Employment Land

- A floorspace ratio (FSR) is applied to the floorspace demand projections (derived in the previous section) to calculate potential demand for employment land.
- FSR data for Great Lakes LGA was obtained from July 2014 Department of Planning and Environment GIS layers.
- Observed FSRs include:
  - B1 Neighbourhood Centre 1:1
  - B4 Mixed Use 1.0-3.0:1 and
  - B5 Business Development 1:1
  - IN1 General Industrial 1:1
  - IN2 Light Industrial 1:1
  - IN4 Working Waterfront 1:1
- As such, a FSR of 1:1 has been applied across all business zones, 1:1 for industrial uses and 1:1 for Special Uses.
- Based on derived floorspace requirements and average floor space ratios, MacroPlan Dimasi estimates around an additional **1.3–1.8 hectares of commercial**, **2.9–3.9 hectares of industrial** and **1.2–1.5 hectares of special uses** land will be required by 2031.

**Table 17.18**  
Demand for Employment Land (2031) - Great Lakes LGA

Land Use Category	Floorspace Demand (hectares)	Average FSR	Land Required (hectares)
Commercial	1.3 - 1.8	1.0	1.3 - 1.8
Industrial	2.9 - 3.9	1.0	2.9 - 3.9
Special Uses	1.2 - 1.5	1.0	1.2 - 1.5

Source: MacroPlan Dimasi

### 17.6.5 Demand for retail floorspace

In the Great Lakes LGA, the potential drivers of future demand for retail floorspace are summarised below:

- Population growth – which is expected to be relatively low (i.e. less than 1% growth).
- Growth in real wages and subsequent growth in average real retail expenditure – which is expected to average 1.2% per annum.
- Tourism visitation – which is assumed to grow in at a rate generally consistent with population growth. Tourism demand tends to ebb and flow from year to year. It is driven by a variety of influencing variables, including the Australian dollar, interest rates, the global economy, availability and pricing of flights and global/national events. We have therefore assumed the share of tourism visitation (as an equivalent share of resident population) remains constant over the forecast period to 2031.

#### Quantification of demand

Table 17.19 outlines the retail floorspace expenditure and equivalent retail floorspace demand generated by the population within the Great Lakes LGA, presently, and at five yearly intervals to 2031. This table also presents the demand generated by the annual tourist/visitor market, for the year to March 2014. Table 17.19 shows the following:

- As at 2014, the residential population of the Great Lakes LGA generates nearly **80,000 sq.m** of retail floorspace demand, which is equivalent to a provision rate of approximately **2.0 sq.m per capita**.
- By 2031, the total residential retail floorspace demand is estimated to grow by nearly **15,900 sq.m**, which is an increase of about **22%** over this timeframe.
- Estimated retail floorspace demand generated by tourists equates to more than **13,000 sq.m**, and is expected to increase by approximately **2,800 sq.m** by 2031.

- Assuming an average floorspace ratio (FSR) of 0.5, the total growth in demand for retail floorspace, of nearly **18,700 sq.m**, equates to an equivalent land requirement of **3.7 hectares**.

**Table 17.19**  
Great Lakes LGA - Retail expenditure (\$M) and floorspace demand (sq.m), 2014-2031\*

	Forecast retail spend (\$M)					Avg. ann.
	2014	2016	2021	2026	2031	growth 2014-31 (%)
Population	36,320	36,700	37,450	38,100	38,500	0.3%
Tourism equiv. pop	6,403	6,470	6,602	6,717	6,787	0.3%
<u>Retail exp. (\$M)</u>						
Food & liquor	207	212	226	241	256	1.3%
Food catering	49	50	54	59	63	1.5%
Apparel	36	37	38	40	41	0.8%
Household	77	78	81	84	87	0.8%
Leisure	21	22	23	24	25	1.0%
General	36	37	40	43	46	1.4%
Retail services	<u>12</u>	<u>13</u>	<u>13</u>	<u>14</u>	<u>15</u>	<u>1.0%</u>
<b>Total</b>	<b>439</b>	<b>449</b>	<b>476</b>	<b>505</b>	<b>533</b>	<b>1.2%</b>
<u>Category RTD (\$/sq.m)</u>						
Food & liquor	9,000	9,000	9,000	9,000	9,000	0.0%
Food catering	6,000	6,000	6,000	6,000	6,000	0.0%
Apparel	5,500	5,500	5,500	5,500	5,500	0.0%
Household	3,000	3,000	3,000	3,000	3,000	0.0%
Leisure	6,000	6,000	6,000	6,000	6,000	0.0%
General	6,000	6,000	6,000	6,000	6,000	0.0%
Retail services	6,000	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>0.0%</u>
<b>Average</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>5,929</b>	<b>0.0%</b>
<u>Floorspace demand (sq.m)</u>						
Food & liquor	23,003	23,595	25,132	26,814	28,427	1.3%
Food catering	8,156	8,407	9,067	9,794	10,512	1.5%
Apparel	6,593	6,695	6,957	7,240	7,487	0.8%
Household	25,560	25,958	26,971	28,070	29,029	0.8%
Leisure	3,546	3,619	3,808	4,012	4,201	1.0%
General	6,009	6,182	6,634	7,131	7,616	1.4%
Retail services	<u>2,058</u>	<u>2,100</u>	<u>2,210</u>	<u>2,328</u>	<u>2,438</u>	<u>1.0%</u>
<b>Total</b>	<b>73,978</b>	<b>75,718</b>	<b>80,233</b>	<b>85,173</b>	<b>89,855</b>	<b>1.4%</b>
Floorspace per capita	2.04	2.06	2.14	2.24	2.33	0.8%
<u>Tourism demand</u>						
Equiv. tourism pop.	6,403	6,470	6,602	6,717	6,787	0.3%
Floorspace per capita	<u>2.04</u>	<u>2.06</u>	<u>2.14</u>	<u>2.24</u>	<u>2.33</u>	0.8%
<b>Tourism floorspace (sq.m)</b>	<b>13,041</b>	<b>13,348</b>	<b>14,144</b>	<b>15,015</b>	<b>15,840</b>	<b>1.2%</b>
<b>Total retail demand (sq.m)</b>	<b>87,019</b>	<b>89,067</b>	<b>94,377</b>	<b>100,187</b>	<b>105,695</b>	<b>1.2%</b>
<b>Demand growth (14-31)</b>					<b>18,675</b>	
<b>Estimated land take (ha)</b>					<b>3.7</b>	

\*Constant 2013/14 dollars & including GST  
Source: MarketInfo; MacroPlan Dimasi

## 17.7 Market Gap

MacroPlan Dimasi has undertaken a market 'gap' analysis of employment land for the Great Lakes LGA. The market position has been derived having regard for the stock of undeveloped zoned land capacity, future precincts and projected demand or take-up of employment land in the Great Lakes LGA.

Key findings pertaining to our gap assessment are presented in Table 17.20.

Land Use	Total Zoned Capacity (ha)	Estimated Capacity (zoned)	Future Supply	Total Supply	Demand (ha)	Balance (ha)
Business	73.3	15.0	0.2	15.2	5.2	10.0
Industrial	100.0	34.7	37.0	71.7	3.4	68.3
Special Uses	18.9	10.6	0.0	10.6	1.4	9.2

Source: MacroPlan Dimasi

- Overall, there is sufficient land available in the Great Lakes LGA to accommodate future employment needs over the forecast period.
- Specifically, it is estimated:
  - *Supply of business land will exceed demand by 10.0 hectares*
  - *Supply of industrial land will exceed demand by 68.3 hectares*
  - *Supply of special uses land will exceed demand by 9.2 hectares*
- Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Great Lakes LGA.
- Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

- As a result of locational and environmental constraints, more employment land may be required in Great Lakes LGA than that suggested by our land assessment, particularly for emerging businesses and industries.
- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) represents a practical approach to delivering more 'employment' land in the Great Lakes LGA.

## 17.8 Conclusions

### 17.8.1 Commercial, Industrial and Special Uses

Over the five years to 2011, the resident population of Great Lakes LGA grew by just 2,161 persons – at an average rate of 1.3% per annum. This rate of growth represented the fourth largest of all LGAs in the North Coast.

By age, the greatest increase to the local population came from retirees (65+), with a net addition of 1,651 persons. This reflects the LGA's popularity for retirees, with persons aged 65+ representing 30% of the local population – the highest of all North Coast LGAs. Similarly, the net migration gain over the 2006 to 2011 period was greatest amongst persons aged 50+ (gain of 1,643 persons).

The rapid expansion in senior age cohorts has amplified demand for health and social services within the LGA. As at 2011, Health Care and Social Assistance was the second largest employing industry (14.9%), while jobs growth in this industry outstripped that observed for the entire LGA (+285 jobs).

Employment growth was also observed in service denominated industries, which directly benefit from a rising resident population. Retail Trade (+84 jobs) and Education and Training (+54 jobs) registered solid growth over the five years to 2011.

Traditional industries such as Manufacturing, Agriculture, Forestry and Fishing and Construction have not shared the same success, with job losses in these industries amount to 263 jobs.

Given the pronounced skew to an aged population within the Great Lakes LGA, it is likely that retirement amongst local workers will increase over time. Consequently, the retention of young working adults will become central to providing health and other services over the forecast period.

Given that the Great Lakes LGA has an association with the tourism industry, it has been adversely impacted by a high Australian Dollar. However, the long term outlook suggests the Australian Dollar will return to more conducive levels, which will assist in boosting visitation from local and international tourists.

Key economic and demographic drivers which are expected to influence the Great Lakes LGA include:

- DPE projections suggest the resident population of Great Lakes LGA will increase to 38,500 persons – at an average rate of 0.4% per annum out to 2031. Population growth is anticipated to be greatest within retiree age cohorts (a combination of inward migration and ageing in place phenomenon)
- Depreciating Australian Dollar to elevate visitation over the forecast period.
- Less price competition in the international aviation market

These trends are implied in our employment projections:

- Aged population will elevate demand for health and social services – superior employment growth in Health Care and Social Assistance services.
- A growing local population will support more population driven industries - evidenced by jobs growth in Education and Training, Professional, Scientific and Technical Services, Retail Trade and Construction industries which will lead to increased demand for commercial, special use and industrial premises.

Our estimates of demand indicate **13,250–17,670 sq.m of commercial**, **18,675 sq.m of retail**, **29,100–38,810 sq.m of industrial** and **11,590–15,450 sq.m of special use** floorspace will be required by 2031.

Based on derived floorspace requirements and average floorspace ratios, MacroPlan Dimasi estimates a further **1.3–1.8 hectares of commercial, 3.7 hectares of retail, 2.9–3.9 hectares of industrial** and **1.2–1.5 hectares of special uses** zoned land will be required by 2031. However, there is currently a sufficient amount of zoned land to accommodate these projected floorspace requirements.

Overall, there is sufficient land available in the Great Lakes LGA to accommodate future employment needs over the forecast period. It is estimated:

- *Supply of business land will exceed demand by 10.0 hectares*
- *Supply of industrial land will exceed demand by 68.3 hectares*
- *Supply of special uses land will exceed demand by 9.2 hectares*

Local environmental and general development constraints such as flooding, topography, difficulties associated with redeveloping existing urban lands and the cost of delivering services may reduce the quantum of land available for future development in the Great Lakes LGA.

Additionally, the location of zoned land may not be appropriate or consistent with market need, which may also reduce the amount of employment land available for future needs.

As a result of locational and environmental constraints, more employment land may be required in Great Lakes LGA than that suggested by our land assessment, particularly for emerging businesses and industries.

Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) represents a practical approach to delivering more 'employment' land in the Great Lakes LGA.

### **17.8.2 Retail**

We make the following preliminary comments in relation to retail market conditions within the Great Lakes LGA:



- Future growth in the residential population and tourism visitation is expected to be moderate, with retail floorspace demand estimated to grow by nearly 18,700 sq.m by 2031, equating to an estimated land requirement of 3.7 hectares.
- Existing retail demand is estimated at more than 87,000 sq.m and we estimate the retail capacity of the existing business zoned land in the LGA to be about 938,210 sq.m. However, because the retail offer in the Great Lakes LGA is relatively self-sufficient, we estimate leakage of about 20% beyond the LGA to centres such as Newcastle and Taree. This means net demand is currently about 69,600 sq.m, increasing to more than 84,500 sq.m by 2031.
- Our preliminary analysis tends to indicate that the existing business land stock will generally **be broadly sufficient to support the future retail demand growth across the LGA, but with little flexibility remaining towards the end of the forecast period.**
- Having regard to the capacity within the existing centres, we recommend that future retail development activity be focused in the existing business zoned land, wherever possible but that over the longer term some additional land will need to be identified to accommodate future retail and commercial demand.

## Section 18: Appendices

### 18.1 Tweed LGA Appendix – Major Industrial Precincts Summary

#### Ozone Street Industrial Precinct



(Source DPE 2014 – Planning Viewer)

**Overview:** Located 3 minutes from the Pacific Highway, easily accessible by both north and south bound traffic. The area is flat and existing stock is ageing. A large area of vegetated land remains undeveloped surrounding the precinct.

**Size:** 70 hectares

**Estimated Developed Land:** 18 hectares (25.7%)

**Zoning:** IN1 General Industrial

**Existing Uses:** A sewerage treatment plant, Boral concrete, Marshal Timber Traders and other local orientated businesses (e.g. Kingscliff Hire and Landscape supplies, Tweed Coast Glass Tweed Wreckers, etc).

**Observed constraints:** Due to the land being relatively low and flat there is risk of flooding



(Source: MacroPlan Dimasi 2014)

## 18.2 Byron LGA Appendix – Major Industrial Precincts Summary

### Centennial Circuit Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

- **Overview:** Located a 10 minute drive from the Pacific Highway, along Ewingsdale Road the main road into the centre of Byron. The site is relatively flat.
- **Size:** 50 hectares
- **Estimated Developed Land:** 40 hectares (80%)
- **Zoning:** IN1 General Industrial

**Existing uses:** Manufacturers (Byron Bay Cookie Company, McTavish Surfboards), self- storage, CSR Gyprock, wholesalers (e.g. Santos Trading), and other local orientated businesses (e.g. Bonnlee Printing, All Glass Byron Bay, Luxury Paints, etc).



(Source: Realestateview.com.au, 2014)



## 18.3 Ballina LGA Appendix – Major Industrial Precincts Summary

### Southern Cross Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** The site has good quality roads, and has a mix of both new and established stock. It is located approximately 20 minutes off the Pacific Highway and a 5 minute drive from the main retail strip in Ballina. The tenancy uptake is good, with most lots and buildings currently leased. The site is bounded by both Ballina/Byron Airport and Homemaker Centre.

**Size:** 61 hectares

**Estimated Developed Land:** 58 hectares (95%)

**Zoning:** IN1 General Industrial

**Existing uses:** Manufacturers (OEM Dynamics, Triple X Wetsuits, Make-it Shutters and shades and Creative blinds and awnings), self- storage, Harvey Norman, wholesalers (e.g. B&E Blanch) and other local orientated businesses (e.g. Byron Bay Glass and Aluminium, Dave Bazar Plumbing, North Coast Wedding & Party Hire etc.). There is a focus on boat/car and caravan related industries.

**Observed Constraints:** Nearby residential development, as well as the adjoining airport lands, may constrain further growth.



(Source: MacroPlan Dimasi 2014)

### Russellton Drive Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** Located 2 minutes from the Bruxner highway near the towns of Wollongbar and Alstonville, the precinct is located at the top of a hill. Most of the industrial stock is well established, with one or two lots currently being prepared for new development.

**Size:** 44 hectares

**Estimated Developed Land:** 28.4 hectares (64.5%)

**Zoning:** IN1 General Industrial

**Existing Uses:** Local Manufacturers (Macadamia Oils of Australia, Koala Tea Company), self-storage, Boral Country-Concrete and quarries, other local oriented businesses (e.g. Rob's Mowers, Richmond Ceramics, Alstonville Kitchens)

**Observed constraints:** The topography of the site is a constraint for future expansion. Access from Bruxner Highway for east bound travellers is via a sharp left turn.



(Source: MacroPlan Dimasi 2014)



## 18.4 Lismore LGA Appendix – Major Industrial Precincts

### South Lismore Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** Located just off Bruxner Highway, the precinct is well serviced with road infrastructure that supports heavy vehicle movement. The area is an approximate 3 minute drive from the Lismore town centre. The site is bounded by the airport immediately to the south and the bulky goods strip along Bruxner highway. The area is flat with some older industrial stock remaining, but space for further expansion.

**Size:** 140 hectares

**Estimated Developed Land:** 110.6 hectares (79%)

**Zoning:** IN1 General Industrial

**Existing uses:** construction supplies, local manufacturers and warehouses.

**Observed Constraints:** The area is flat and at risk of flooding. Heavy vehicles travelling north along Bruxner Highway travel through the centre of Lismore.



(Source: MacroPlan Dimasi 2014)

**North Lismore Industrial Precinct**



(Source: DPE 2014 – Planning Viewer)

**Overview:** The North Lismore Industrial precinct is a small industrial area located in North Lismore. The area is approximately 10 minutes from Lismore Centre and the Bruxner Highway. There industrial site is interspersed with residential dwellings.

**Size:** 33 hectares

**Estimated Developed Land:** 14.9 hectares (45%)

**Zoning:** IN1 General Industrial & IN2 Light Industrial

**Existing uses:** Boral Country Concrete Plant, North East cranes, AJ Magnay Building Materials and hardware, farm machinery.



(Source: Google Maps 2014)



## 18.5 Kyogle LGA Appendix – Major Industrial Precincts Summary

### Kyogle Road Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** Located approximately 15 minutes from the town of Kyogle, the industrial area is fairly isolated.

**Size:** 46 hectares

**Estimated Developed Land:** 8.2 hectares (18%)

**Zoning:** IN1 General Industrial

**Existing uses:** Plywood Australia (manufacturer)



(Source: Google Maps 2014)

### Craig Street Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** Located off Summerland Way, which connects Kyogle with Casino. The area is relatively flat and surrounded by rural and residential land.

**Size:** 32 hectares

**Estimated Developed Land:** 12.2 (38%)

**Zoning:** IN2 Light Industrial

**Existing uses:** Grahams Concrete and other local orientated businesses such as Andersons Engineering and Glowtech Services.



(Source: Google Maps 2014)



## 18.6 Richmond Valley Appendix – Major Industrial Precincts Summary

### Reynolds Road Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** The estate is located 10 minutes north of Casino, starting at the intersection of Reynolds Road and Summerland Way.

**Size:** 166 hectares

**Estimated Developed Land:** 70 hectares (42%)

**Zoning:** IN1 General Industrial

**Existing uses:** Boral Pole Plant, Riverina Stockfeed, Cattle Sale Yards Complex and the Northern Co-op Meat Company Abattoir.



(Source: Google Maps 2014)

## Queensland Road Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** Located just south of Reynolds Road industrial area, this precinct is on the outer edge of Casino. The site has good heavy vehicle access from Summerland Way.

**Size:** 45 hectares

**Estimated Developed Land:** 30 hectares (67%)

**Zoning:** IN1 General Industrial

**Existing uses:** Northern Co-Operative Meat

**Observed constraints:** flood prone land



## 18.7 Clarence Valley LGA Appendix – Major Industrial Precincts Summary

### South Grafton Industrial Park



(Source: DPE 2014 – Planning Viewer)

**Overview:** The precinct spans a large area, however it is fragmented. There are substantial amounts of vacant land, with well-established industrial development closer to Grafton. The precinct is accessible off the Pacific Highway and approximately 15 minutes from Grafton town centre.

**Size:** 185.5 hectares

**Estimated Developed Land:** 149.7 hectares (81%)

**Zoning:** IN1 – General Industrial

**Existing uses:** a saw mill and associated product manufacturing, an abattoir and meat sale yards, a functioning brickwork site, as well as freight forwarding companies and other smaller service industries

**Observed Constraints:** The precinct is fragmented and disconnected. Whilst some roads cater to heavy vehicles other roads are not appropriate. There are steep slopes within the southernmost part of the precinct.



(Source: MacroPlan Dimasi 2014)

## Koolkhan-Trenayr Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 15 minutes north of Grafton, the site spans between Trenayr Road and Summerland Way. The site is interspersed with rural land and is segregated by the rail line passing through the centre.

**Size:** 181.3 hectares

**Estimated Developed Land:** 138.6 hectares (76%)

**Zoning:** IN1 – General Industrial

**Existing Uses:** three large scale timber processing operations and a timber log preservation plant. Other uses comprise engineering works, concrete products manufacture, earthmoving contractors, foundry, vehicle smash repair, nursery, tile display and sales, vehicle wreckers, mini storage and Council depot. Mainly timber oriented industry.

**Observed Constraints:** The site is widespread, heavy vehicle access is poor along Trenayr Road. The site is 25 minutes from the Pacific Highway through the centre of Grafton. Parts of the land are low lying and likely prone to flooding.



(Source: MacroPlan Dimasi 2014)



## 18.8 Coffs Harbour Appendix – Major Industrial Precincts Summary

### Isles Industrial Park



(Source: DPE 2014 – Planning Viewer)

**Overview:** the industrial area is 10 minutes from Coffs Harbour centre, and across from Coffs Medical Precinct. The site is 1 minute from the Pacific highway and is designed to cater to heavy vehicle traffic. The estate is relatively new with a large number of vacant sites and leasable buildings available.

**Size:** 116 hectares

**Estimated Developed Land:** 85 hectares

**Zoning:** IN1 – General Industrial

**Existing Uses:** Waste Services, HQ Concrete

**Observed Constraints:** Future expansion will need to be further from the Pacific Highway due to the existing business zoned lands adjacent.



(Source: MacroPlan Dimasi 2014)



### Cook Drive Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** accessible from the Pacific Highway (1minute), good heavy vehicle access to and from the highway, with bulky goods at the intersection. The precinct has well established stock and there is limited vacant land, with most businesses appearing to be operational. Located 5 minutes from Coffs Harbour centre, 1 min from Isles Industrial and the Coffs Medical precinct and 2 minutes from Hurley Drive industrial precinct.

**Size:** 35 hectares

**Estimated Developed Land:** 34 hectares (97%)

**Zoning:** IN1 – General Industrial

**Existing uses:** manufacturers (BlueScope Lysate), Campbell's Cash and Carry and some 'local' businesses (e.g. Boambee Industrial Supplies, the Paddock Stock Feed and Saddler, Coffs Metal fencing, etc.).

**Observed Constraints:** the precinct is surrounded by vegetation, and is relatively flat (may be flood prone).



(Source: MacroPlan Dimasi 2014)

## High Tech Drive



(Source: DPE 2014 – Planning Viewer)

**Overview:** located off Hogbin Drive, there is suitable access for heavy vehicle traffic. 5 minutes from the Pacific Highway, 2 minutes to Coffs Tertiary Education campus and Coffs Harbour Regional Airport. The precinct is surrounded by dense vegetation and located in close proximity to a high school. There are no vacant lots

**Size:** 20 hectares

**Estimated Developed Land:** 19 hectares (95%)

**Zoning:** IN1 – General Industrial

**Existing uses:** Coffs Document Storage, Tyres4U, Coffs Harbour 4WD Centre, Steel-Line Garage Doors, Door Centre, Genesis Fitness Club, Greg Wilson Smash Repairs, O'brien Built

**Observed Constraints:** The site is surrounded by dense vegetation, heavy vehicle traffic must go past schools and residential areas to return to the Pacific Highway.



(Source: MacroPlan Dimasi 2014)



**Bosworth Drive Industrial Precinct**



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 5 minutes from Woolgoolga town centre and 15 minutes north of Coffs Harbour. Located on the Old Pacific Highway, approximately 10 minutes from the new Pacific Highway route. The industrial precinct has well established businesses with limited vacant land remaining.

**Size:** 35 hectares

**Estimated Developed Land:** 14 hectares (40%)

**Zoning:** IN1 – General Industrial

**Existing uses:** Coffs Coast Glass and Aluminium, North Coast Coffee Roasters, Woolgoolga Mechanic Repairs, Coffs Harbour Workplace Assessments, Boral Concrete, Authentic Automotive, Woolgoolga Motors, Woolgoolga Mitre 10.

**Observed Constraints:** the topography of the precinct (southern end is on a hill), low lying areas may be flood plane.



(Source: MacroPlan Dimasi 2014)

## 18.9 Bellingen LGA Appendix – Major Industrial Precincts Summary

### Short Cut Road Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** located off Short Cut Road, which intersects with the Pacific Highway, the precinct is relatively isolated from any townships and is surrounded by rural residential.

**Size:** 48 hectares

**Estimated Developed Land:** 18 hectares

**Zoning:** IN1 – General Industrial

**Existing uses:** Aussie Loo Portable toilets and Builders Sheds, Outer Islands Surfboards and Full Moon Natural Health Products.



(Source: Google Maps 2014)



**Wattle Street Industrial Precinct**



(Source: DPE 2014 – Planning Viewer)

**Overview:** A small industrial precinct located north of Dorrigo Town. Located adjacent to the Dorrigo Steam and Railway Museum. The road network is not suited to heavy vehicle traffic.

**Size:** 7.2 hectares

**Estimated Developed Land:** 2.8 hectares (40%)

**Zoning:** IN1 – General Industrial

**Existing uses:** n/a

**Observed constraints:** Located close to a creek within potentially flood prone land



(Source: Google Maps 2014)

## 18.10 Nambucca LGA Appendix – Major Industrial Precincts Summary

### Macksville Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 4 minutes from the Pacific Highway off Upper Warrell Road. Heavy vehicles can access the site. The industrial area is relatively new, with many vacant lots towards the north at the bottom of the slope.

**Size:** 50 hectares

**Estimated Developed Land:** 30 hectares (60%)

**Zoning:** IN1 – General Industrial

**Existing uses:** manufacturers (Australian Precast Solutions and PCF industries), self- storage, Boral concrete, wholesalers (e.g. Geoff Andrews direct and Comet Windmills), transport (Classic coaches) and other local orientated businesses (e.g. Elite Pet Care, LSD Automotive, etc.).

**Observed Constraints:** the precinct is located on a steep slope, with some roads not conducive to heavy vehicle traffic. Residential development borders the area to the west.



(Source: MacroPlan Dimasi 2014)



### Nambucca Heads Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 5 minutes from Nambucca Heads town centre the precinct is 2 minutes from the Pacific Highway. Access is not designed for heavy vehicles. Much of the existing stock is established, with some space available for new development.

**Size:** 42 hectares

**Estimated Developed Land:** 28 hectares (67%)

**Zoning:** IN1 – General Industrial

**Existing Uses:** local manufacturing, buildings supplies, automotive repairs and parts, self-storage.

**Observed Constraints:** the industrial precinct is located on sloping land



(Source: MacroPlan Dimasi 2014)



## 18.11 Kempsey LGA Appendix – Major Industrial Precincts Summary

### Akubra Place Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** The site is located 5 minutes from Kempsey Town Centre and 2 minutes from the Pacific Highway. Access is not designed for heavy vehicles. Much of the existing stock is established, with some space available for new development.

**Size:** 170 hectares

**Estimated Developed Land:** 80 hectares (47%)

**Zoning:** IN1 – General Industrial

**Existing Uses:** Akubra Australia and associated product manufacturing and warehouse facilities, Boral concrete, a metal recycler and other smaller service industries.

**Observed Constraints:** The site is restricted by surrounding residential uses and other uses (such as schools). Some lots are low lying and at risk of flooding.



(Source: MacroPlan Dimasi 2014)

### South Kempsey Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** the site is directly accessible off the Kempsey interchange and is suited to heavy vehicles. The site is 6 minutes from Kempsey town centre.

**Size:** 100 hectares

**Estimated Developed Land:** 70 hectares (70%)

**Zoning:** IN1 – General Industrial

**Existing uses:** Bellbrook Water Treatment Plant



(Source: MacroPlan Dimasi 2014)



## 18.12 Port Macquarie-Hastings LGA Appendix – Major Industrial Precincts Summary

### Kings Creek Industrial Precinct (Bago Rd)



(Source: DPE 2014 – Planning Viewer)

**Overview:** the site is accessible via Bago Road, which is winding and narrow. The precinct is located 15 minutes from the Pacific Highway and 10 minutes from the Oxley Highway. The surrounding area is rural and rural residential oriented, and there is limited development within the area.

**Size:** 120 hectares

**Estimated Developed Land:** 87 hectares (72.5%)

**Zoning:** IN1 General Industrial

**Existing uses:** a range of small businesses servicing the local and regional areas (e.g. North Coast Fire Systems, Proudtrans Regional Freight, Kazac Civil, Bago Woodworks, etc.)

**Observed Constraints:** existing road network is not well suited to heavy vehicles.



(Source: MacroPlan Dimasi 2014)

### South Herons Creek Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 5 minutes off the Pacific Highway , it is defined by the Timber Mill. Access from the Pacific Highway is suited to heavy vehicles, redistribution back onto the Highway is via Bago Road. The site is isolated and entry is restricted.

**Size:** 100 hectares

**Estimated Developed Land:** 10 hectares (10%)

**Zoning:** IN1 General Industrial

**Existing uses:** Herons Creek Timber Mill.





(Source: Google Maps 2014)

### Lake Road Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 5 minutes from the Pacific Highway, 5 minutes from Port Macquarie town centre and 2 minutes from the Port Macquarie medical precinct. The area is well established and there is limited capacity for expansion. Lake Road is suited to heavy vehicles and a bulky goods strip is located along Lake Road in front of the industrial land. There are small hills but generally the area is flat.

**Size:** 80 hectares

**Estimated Developed Land:** 76 hectares (95%)

**Zoning:** IN1 General Industrial

**Existing uses:** a prominent bulky goods strip along Lake Road (e.g. Bunnings, Bing Lee, The Good Guys, Sleep City, Super A-Mart, Repco, Doors Plus, SpotLight, etc.), and more traditional 'industrial' businesses and uses such as the private transport depots (e.g. Port Macquarie Taxi Cabs and the Collins Bus Service bases), building suppliers (Boral concrete), steel fabricators, removalists, equipment hire (Kennards Hire), plumbers/electricians, wholesalers, building, engineering, commercial laundry and glass glaziers.

**Observed Constraints:** limited capacity to expand, close to residential development



(Source: MacroPlan Dimasi 2014)1

## 18.13 Greater Taree LGA Appendix – Major Industrial Precincts Summary

### Kolodong Industrial Estate



**Overview:** Located 5 minutes outside of the Taree Town Centre, the precinct has adequate heavy vehicle access along Wingham Road.

**Size:** 67 hectares

**Estimated Developed Land:** 24 hectares (36%), due to heavily constrained land.

**Zoning:** IN1 General Industrial

**Existing uses:** Motor vehicle repairs, self-storage solutions, engineering business and other businesses that trade to a localised business and residential market.



(Source: Google Maps 2014)



### Whitbread Street Industrial Precinct



**Overview:** Located within the township of Taree. This precinct is centrally located with easy access to the Pacific Highway via Muldoon Street and onto Manning River Drive, providing access through to key regional trade locations along the Mid North and Far North Coast.

**Size:** 100 hectares

**Estimated Developed Land:** 80 hectares (80%). This location is constrained by flooding.

**Zoning:** IN2 Light Industrial

**Existing uses:** Motor vehicle repairs, blinds and awnings retailers, glass businesses, Pet Barn, and other businesses that trade to a localised business and residential market.



(Source: Google Maps 2014)

**Beeton Parade Industrial Precinct**



**Overview:** Located just outside the township of Taree. The precinct is relatively central. Access to the Pacific Highway can be gained by Crescent Ave and Manning River Drive.

**Size:** 29 hectares

**Estimated Developed Land:** 10.8 hectares (79%).

**Zoning:** IN2 Light Industrial

**Existing uses:** Towers Smash Repairs, Repco Car Service and Chelmsford Farm Machinery



(Source: Google Maps 2014)



## 18.14 Gloucester LGA Appendix – Major Industrial Precincts Summary

### South Stratford Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 1km south of Stratford town, accessible from Buckets Way. Buckets Way allows access to Tamworth, Taree and Armidale.

**Size:** 135 hectares

**Estimated Developed Land:** 70 hectares (52%)

**Zoning:** IN3 Heavy Industrial



(Source: Google Maps 2014)

### South Gloucester Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** located 2km south of Gloucester the site is accessible via Buckets Way. The site is flat and relatively undeveloped.

**Size:** 120 hectares

**Estimated Developed Land:** 55 hectares (46%)

**Zoning:** IN1 General Industrial

**Existing uses:** manufacturers and other local orientated businesses (e.g. Elite Pet Care, LSD Automotive, etc.).



(Source: Google Maps 2014)



## 18.15 Great Lakes LGA Appendix – Major Industrial Precincts Summary

### Sweet Pea Road Industrial Precinct



(Source: DPE 2014 – Planning Viewer)

**Overview:** located off The Lakes Way, 5 minutes from Forster. The site is isolated and surrounded by vegetation.

**Size:** 40 hectares

**Estimated Developed Land:** 5 hectares (12.5%)

**Zoning:** IN2 Light Industrial

**Existing Uses:** extractive industry

**Observed Constraints:** Road network would need upgrading for frequent heavy vehicle traffic.

## Tuncurry Industrial Estate



(Source: DPE 2014 – Planning Viewer)

**Overview:** located within Tuncurry the site is surrounded by expanding residential development. Access is via Manning Street.

**Size:** 30 hectares

**Estimated Developed Land:** 17 hectares (57%)

**Zoning:** IN2 Light Industrial

**Existing Uses:** Harvey Norman, Forster Concrete

**Observed Constraints:** surrounded by residential development.



(Source: Google Maps 2014)

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