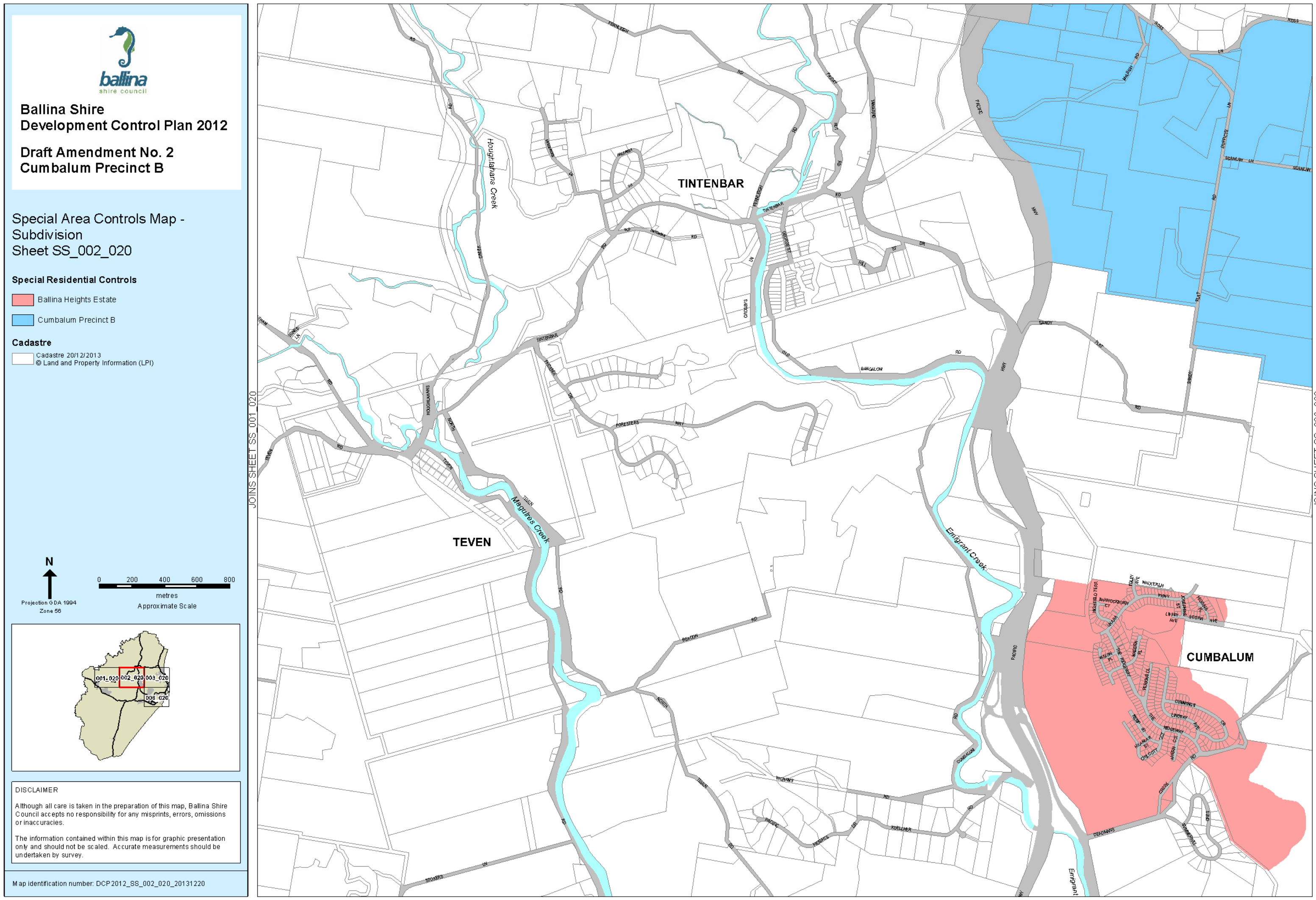
ballina
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Ballina Shire
Development Control Plan 2012
Draft Amendment No. 2
Cumbalum Precinct B
Special Area Controls Map -
Subdivision
Sheet SS_002_020
Special Residential Controls
Ballina Heights Estate
Cumbalum Precinct B
Cadastre
Cadastre 20/12/2013
© Land and Property Information (LPI)
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Zone 56
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DISCLAIMER
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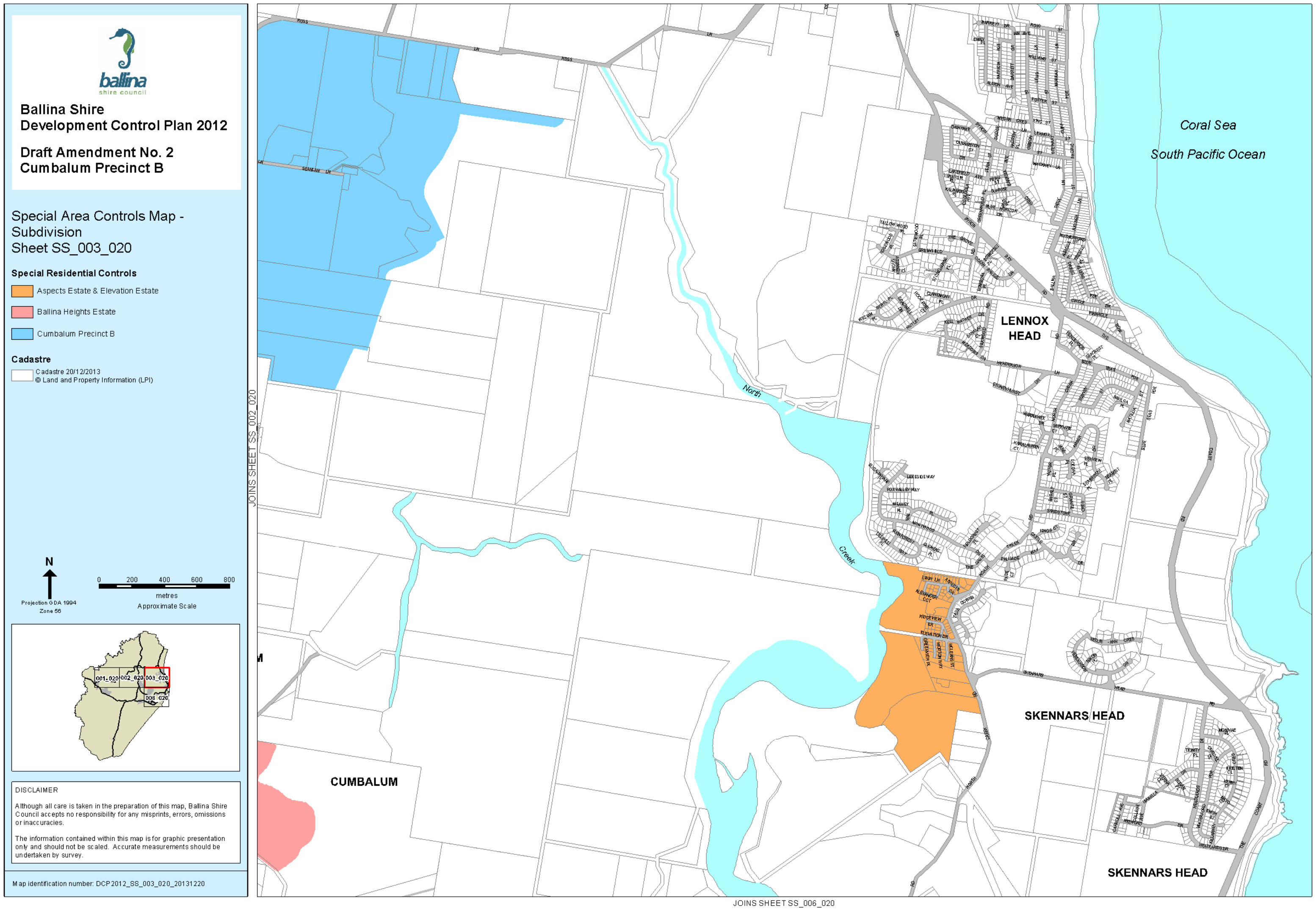
CUMBALUM
Houghlahans Creek
Maguires Creek
Emigrant Creek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Development Control Plan 2012
Draft Amendment No. 2
Cumbalum Precinct B
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Ballina Heights Estate
Cumbalum Precinct B
Cadastre
Cadastre 20/12/2013
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DISCLAIMER
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Map identification number: DCP2012_SS_003_020_20131220
Coral Sea
South Pacific Ocean
LENNOX HEAD
SKENNARS HEAD
CUMBALUM
North Creek
JOINS SHEET SS_002_020
JOINS SHEET SS_006_020

Ballina Shire
Development Control Plan 2012

Draft Amendment No. 2
Cumbalum Precinct B

Natural Areas & Habitat Map
Sheet NH_001_080

- Natural Areas & Habitat
- 50m Buffer - Natural Areas & Habitat
- Cadastre 20/12/2013
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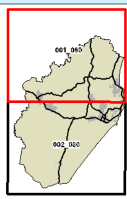

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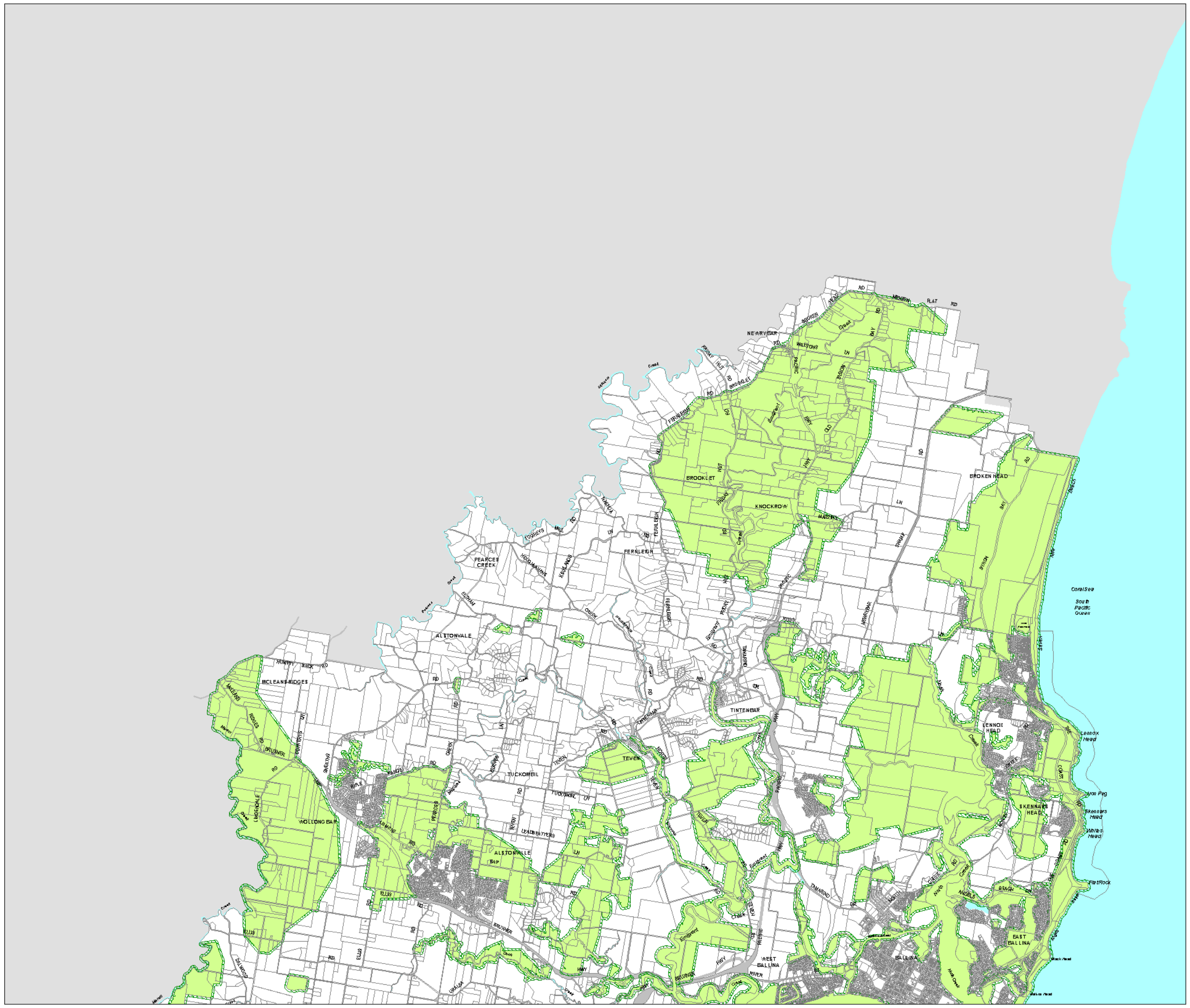

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Cumbalum Precinct B

Economics Needs Assessment

Prepared by:

RPS AUSTRALIA EAST PTY LTD

Robina East Quay Corporate Park
Suite 4, 34-36 Glenferrie Drive
Robina, QLD, Australia, 4226

T: +61 7 5553 6900
E: William.Owen@rpsgroup.com.au

Prepared for:

21ST CENTURY BUILDERS

PO Box 1133
Byron Bay

Client Manager: William Owen
Report Number: PR116647-2
Version / Date: 1 July 2013

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Document Status

Version	Purpose of Document	Orig	Review	Review Date
1.0	Client Exposure Draft	WO	WO	18 June 2013
2.0	Final	WO	WO	1 July 2013

Contents

Tables

Figures

Summary

The subject centre located on Ross Lane at Cumbalum (west of Lennox Heads) in Ballina Shire. The intent of this report is to determine the appropriate scale for the local centre considering the nature of the community and the distribution of existing retail/activity centres.

Demand Assessment

The future demand for local shopping facilities will be shaped by further urban development and the changes to work and shopping trips generated by the establishment of the new community. It is expected that the subject site will have the symbiotic relationship with the release area and it will also service a wider catchment that is currently using Ross Lane on a regular basis.

The local centre should be located in proximity to Ross Lane (with direct access and exposure) in order to fully service the everyday retail needs of the broader catchment (as required by the planning instruments). Without this access of exposure the local centre will struggle to fulfil the daily needs of local residents. An undersized (or unsuccessful) local centre will simply mean that residents of the local area will need to travel to other centres to fulfil their impulse and convenience shopping needs. Such unnecessary trips consume resources (including time and petrol) and do not contribute to the establishment of a viable community.

The tenancy mix of the subject site will likely be dominated by convenience retail and fast food operations. This type of mix will cater to the drop in, passing and top up shopping trip. Convenience and ease of access are important attributes for future patrons that utilise Ross Lane on a regular basis

The subject site will cater to a defined local need that cannot be accommodated in any of the existing centres.

Recommended Inclusions

Issues	Inclusions	Site Size
What retail and related uses should be accommodated on site? (Including the size and function of the supermarket).	A 3,000 Sq M local centre is recommended. This will consist of : • A convenience supermarket (max GFA of 1,400 Sq M) • 1,600 Sq M of specialty retail (convenience, impulse, food services and professional/personnel services)	A 1Ha site is recommended.
Should the centre contain a child care centre?	The catchment has a potential demand of between 100 and 175 child care places (at capacity). It is recommended that allowance be made for two child-care centres (to allow for staging) with a potential total capacity of 175 children.	A 2,500 Sq M (total) site is recommended for the two centres.
What other uses could be included in the local centre?	• Service station on a 4,000 Sq M site • Community hall (on a 2,000 sq M site) • 6 to 12 SOHO dwellings – on the fringe of the centre and each offering about 150 Sq M to 180 Sq M of built area. • Open space (parks and linkages)	The retail, commercial and community components could be established on a 6,000 Sq M site. The SOHO units would be developed on adjacent land and are not included in this calculation. This additional area does not include open space, parks or linkages.

Issues	Inclusions	Site Size
What is the short, medium and long term demand for the centre taking into account the subject development and nearby release areas? Is a 3 Ha site the appropriate size? If not, what site size is required?	The centre will need to be developed in stages in line with the population growth of the community. It is estimated that the first stage of the retail component will be 1,000 Sq M GFA anchored by a small (500 Sq M) convenience supermarket. It is important that the supermarket has the capacity to expand over time.	If tightly planned - the retail, child centre, and other elements of built form (not including the SoHo units) could be accommodated on a 2 ha site. This figure does not include open space, connections, district park or other community uses. The 3 ha site would provide a degree of flexibility in the planning and delivery of the local centre. However, it may be excessive for the needs of the community and the planning and layout of the local centre should allow for any surplus land to be developed for residential users.
Is the centre suited to the Ross Lane location? Which development options are suitable from a market perspective?	In order to service the local catchment and the wider community (as required by the relevant planning instruments) it is essential that the local centre be established in proximity to Ross Lane. This will require a high degree of visibility and legibility for the main entrance road with the scale and inclusions in the centre (particularly the service station) being readily apparent to passing traffic.	A centre located away from Ross Lane will fail to fulfil the community service objectives required by the planning scheme. Additionally, it is likely that only some core retail uses will be viable and a number of retail/commercial uses will not become established. This will have a flow on effect of reducing the appeal of the centre and limiting the capacity of the precinct to develop nonretail sources of appeal such as SOHO, child care and the service station.

Need and Demand

- The population about 2,700 households (at capacity) will have a significant call for convenience retail products.
- The Trade Area is likely to continue to exhibit a demographic profile of lower income households and families with children. This demographic is often time constrained and will benefit from the proximity and accessibility of a local shopping centre with a convenience store (particularly for impulse shopping on the homebound trip).
- The proposed centre will have no impact on the viability or role and function of any other centre or precinct in the Ballina Shire.
- The provision of 3,000 Sq M of new retail and food services floor space, child care centres, service station and SOHO units will generate an estimated 120 to 160 equivalent full-time jobs. These jobs will provide opportunities for local residents, particularly working mothers, who might otherwise have to travel some distance to gain employment.
- There will be no material impacts generated by the proposed centre on any other centre or precinct.
- The level of services provided to local residents will be enhanced by the proposed centre.

Consequently, the provision of a new local centre at Ross Lane will not negatively impact the nature of the Ballina Shire retail hierarchy. Further, the centre will provide a significant range of benefits for local residents.

1.0 Introduction

The subject centre located on Ross Lane at Cumbalum (west of Lennox Heads) in Ballina Shire. The intent of this report is to determine the appropriate scale for the local centre considering the nature of the community and the distribution of existing retail/activity centres.

A subsequent task will be to consider economic impact implications of the centre in the Ross Lane location. This economic assessment will form part of the application to Council.

It is likely that the retail uses will consist of a range of food service, personal service, professional service and other convenience retail. The scale and assumed inclusions will be determined as part of this reporting process.

The retail centre will trade to the local area and the passing traffic on Ross Lane

Methodology

This economic impact statement responds to a range of issues with respect to the hierarchy of centres, impact on other retail and the benefits to the community.

The methodology for undertaking this economic impact statement is as follows:

- Site and regional assessment - to determine the suitability of the site to host the proposed use and the implications derived from existing and proposed regional land uses.
- Retail infrastructure–an analysis of the existing retail infrastructure in the region.
- Trade area, demographic, expenditure and market share analysis.
- Impact analysis - a discussion of likely impacts, community need and community benefits.

2.0 Site and Regional Assessment

2.1 Introduction

The subject site is located on Ross Lane in the northern portion of the Cambalum Ridge Urban Release area.

A local centre in this locality is anticipated by the Cumbalum Ridge (precinct B) planning proposal dated November 2011. The intent is for this centre to service the local and wider community and to complement (but not compromise) the existing retail hierarchy or higher order commercial facilities in the remainder of the shire.

The strategy identifies that 3 ha of land is appropriate as a future local commercial centre to provide for the daily needs of future residents.

The urban land form in this part of Ballina Shire area is strongly influenced by vegetation, rivers, creeks and the coastline. This has shaped the urban development footprint and created a series of urban areas defined by the coast and creek lines. The overall implication is the dominance of the major roads in the area which has attracted all commercial and retail activities.

2.2 Implications

The future demand for local shopping facilities will be shaped by further urban development and the changes to work and shopping trips generated by the establishment of the new community. It is expected that the subject site will have the symbiotic relationship with the release area and it will also service a wider catchment that is currently using Ross Lane on a regular basis.

The local centre should be located in proximity to Ross Lane (with direct access and exposure) in order to fully service the everyday retail needs of the broader catchment (as required by the planning instruments). Without this access of exposure the local centre will struggle to fulfil the daily needs of local residents. An undersized (or unsuccessful) local centre will simply mean that residents of the local area will need to travel to other centres to fulfil their impulse and convenience shopping needs. Such unnecessary trips consume resources (including time and petrol) and do not contribute to the establishment of a viable community.

The tenancy mix of the subject site will likely be dominated by convenience retail and fast food operations. This type of mix will cater to the drop in, passing and top up shopping trip. Convenience and ease of access are important attributes for future patrons that utilise Ross Lane on a regular basis

The subject site will service the local and wider area, this will include residents that typically use Ross Lane on a regular basis.

Lennox Head provides a broad range of services and facilities that will complement the smaller Ross Lane Centre.

Major retail (including full line supermarkets and higher order shopping) is located in Ballina. The Ross Lane Centre is significantly smaller than these higher order precincts and local residents will travel to Ballina on a regular basis to undertake higher order supermarket and comparison shopping.

The Ross Lane Centre will service a generalised catchment consisting of the proposed urban release area, residents of the surrounding area and traffic that utilises Ross Lane on a regular basis.

Figure 1 - Site and Regional Assessment

3.0 Retail and Centres

3.1 Introduction

The trading potential and community need for the subject site will be shaped by the demands of local residents and the presence of other retail, community and service centres in the region

The retail infrastructure is detailed in the following table and figure (see following section).

Table 1 Existing Retail Infrastructure

Name	Location	Size	Main Tenants
Ballina Central	44 Bangalow Road, Ballina	14,183 Sq M	Big W (7,412 Sq M) Ritchies IGA Supermarket & Liquor (3,761 Sq M)
Ballina Fair Shopping Centre	Corner Fox and Kerr Streets, Ballina	16,434 Sq M	Woolworths (3,600 Sq M) Target (2,979 Sq M) Best & Less (1,150 Sq M)
Kmart Centre	Kerr Street, Ballina	9,000 Sq M	Kmart (6,000 Sq M) Coles (3,000 Sq M)
ALDI Ballina	Corner North Creek Road and Pacific Highway, Ballina	1,360 Sq M	ALDI (1,360 Sq M)
Byron Plaza	Jonson Street, Byron Bay	3,000 Sq M	Woolworths (2,058 Sq M)
ALDI Byron Bay	Corner Byron and Fletcher Streets, Byron Bay	1,500 Sq M	ALDI (1,500 Sq M)
Byron West Shopping Fair	Corner Bayshore Drive and Sunrise Boulevard, Byron Bay	2,772 Sq M	Supa IGA (1,791 Sq M)
Lennox Head Main Street	Ballina Street, Lennox Head	6,860 Sq M of retail	IGA (600 Sq M)
East Ballina Shopping Centre	Links Avenue, East Ballina	1,500 Sq M	FoodWorks (300 Sq M)
FoodWorks Bangalow	Shop 2, 2 Byron Street, Bangalow	200 Sq M	FoodWorks (200 Sq M)
SPAR Ballina	Shop 17, 101-105 Kalinga Street, Ballina	200 Sq M	SPAR (200 Sq M)
SPAR Suffolk Park	Clifford Street, Suffolk Park	1200 Sq M	Spar (400 Sq M)

Source: Property Council of Australia 2012/13 NSW and ACT Shopping Centre Directory, RPS

Table 2 Planned Retail Infrastructure

Name	Address	Size	Description
Woolworths	River Street, Ballina	1,600 Sq M	Original Woolworths on site burnt down in December 2011. New Woolworths being built in its place.
Retail Centre	Pacific Pines Estate, Lennox Head	3,000 Sq M of retail, 800 Sq M of commercial office space	Approved

3.2 Other Uses

These centres, and adjacent precincts also contain a range of uses that complement a local centre. These include service stations, hotels, bottle shops, child-care centres and professional/personal services. It is recognised that the provision of these services will be reliant upon the demographic profile and community needs of the future population. Therefore, it is important to build in a degree of flexibility as to how the centre evolves over time.

3.3 Implications

Residents in the vicinity of the subject site currently have access to a limited range of local convenience retail. This is expected given the current small population base and low levels of residential density.

A 3 ha local centre has the capacity to provide a range of retail and related services that will satisfy the everyday needs of local residents. This is likely to include:

- a small convenience supermarket
- a service station (possibly associated with the convenience supermarket)
- impulse and convenience retailers including food service, restaurant, takeaway and bottle shop
- services such as hairdressers, real estate, pool supplies and the like
- child care centre

Residents of the local area will find it most convenient to shop in the Lennox Heads Main Street until such times as the proposed centre is established on site. Consequently, the subject Centre will have a close relationship with Lennox Heads and will need to be scaled appropriately to avoid undue impact.

The larger retail offerings in Ballina are effectively immune from impact given the small scale of this centre. Retail centres in other localities will continue to trade to their existing catchments with the proposed centre scale to meet the needs primarily of future expansion area residents.

4.0 Trade Area Delineation

4.1 Trade Area Delineation

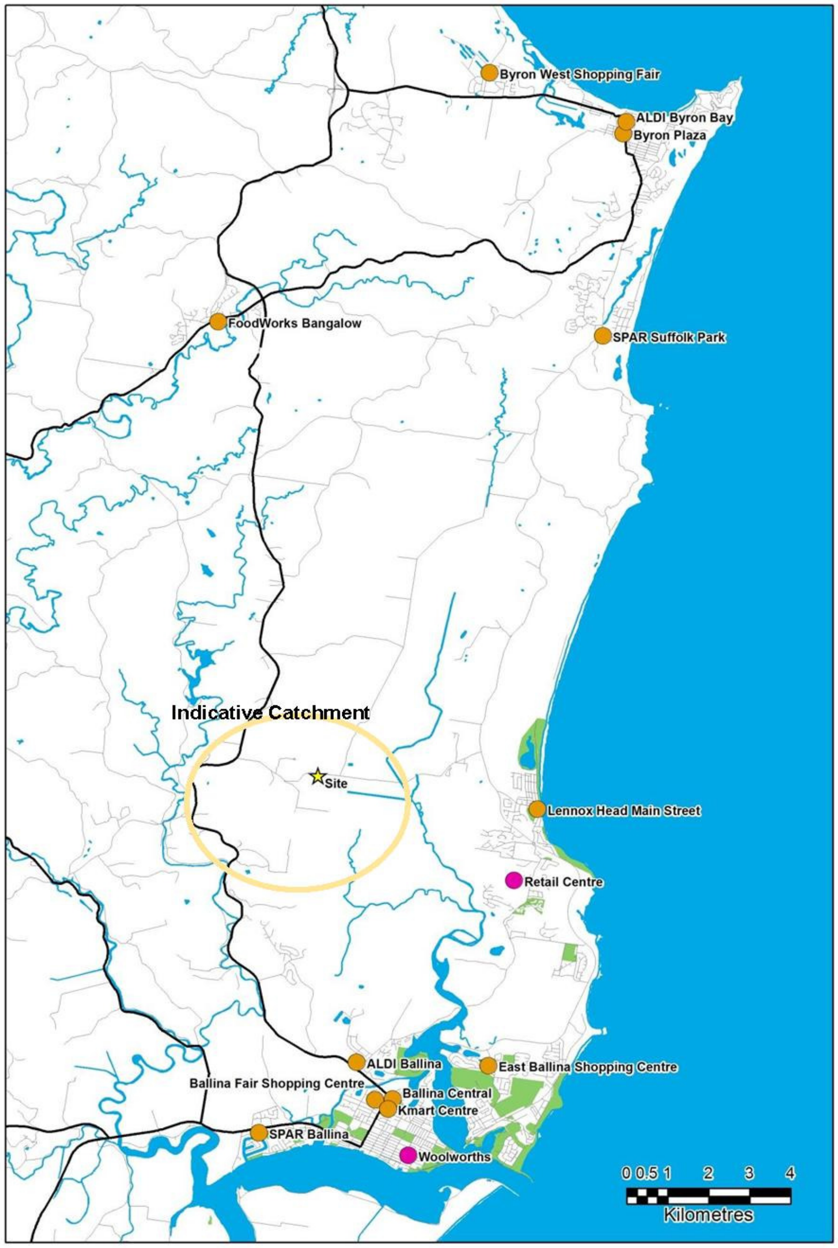
The trade area for the subject site is defined by a number of physical and psychological boundaries, including normal travel patterns and the scale and appeal of comparable and competitive retail precincts located at Lennox Heads and elsewhere in Ballina Shire.

The trade area is defined as the future release area, plans of which are included as an appendix, and the current and future residents that surround this precinct.

The trade area is indicative only, and based on the Australian Bureau of Statistics (ABS) Statistical Area 1 (SA1) boundaries. The catchment is assessed to include two SA1 (1123721 and 1123723). These boundaries are somewhat extensive and reflect the low population density in the area. They have been selected as the catchment as these 500 residents will be benefited by the subject proposal and utilise the Ross Lane Centre as their local shopping precinct (as anticipated in the planning instruments).

The subject site will generate a strong local market share from a well-defined (narrow) catchment with an extensive amount of out of catchment expenditure directed towards higher-order centres located at Lennox Heads and Ballina.

Figure 2 Retail Infrastructure and Catchment



5.0 Demographic and Expenditure Profile

5.1 Introduction

This section provides an assessment of the population projections, demographic and expenditure characteristics of the defined catchment.

5.2 Demographic Characteristics

The demographic profile for the trade area has been derived from 2011 Australian Bureau of Statistics (ABS) Census data. The demographic characteristics have been compared against those of the Ballina Shire and New South Wales. A full demographic profile is listed in Appendix A.

Key demographic features include:

Age Distribution

- The proportion of children aged 0 to 19 years within the Trade Area (29%) is higher than Ballina (24%) and NSW (26%).
- The proportion of people aged 55 years and older in the Trade Area (28%) is lower than Ballina (37%) and comparable to NSW (27%).
- Factors such as those stated above, indicate that the Trade Area consists of a broad demographic mix but with a concentration of households with dependent children.

Dwelling Type

- The proportion of separate dwellings in the Trade Area (100%) is higher than Ballina (71%), and NSW (70%).

Household Structure

- The proportion of couple families with children is higher within the Trade Area (40%) in comparison to Ballina (36%), but lower than NSW (46%).
- The Trade Area has a higher proportion of one parent families (22%) than Ballina (18%), and NSW (16%).

Household Size and Home Ownership

- The average household size of 2.75 persons per household within the Trade Area is larger than the average household size of 2.36 in Ballina and 2.59 in NSW.
- The proportion of dwellings that are rented in the Trade Area (29%) is similar to Ballina (29%) and NSW (30%).

Average Household Income

- The average annual household income of $65,000 in the Trade Area is similar to Ballina ($63,250) but lower than the state average ($80,600).

- A higher proportion of single parent families, families with children and moderate income earners indicate that trade area residents will benefit from a complete range of convenient local retail facilities that offer alternatives to a longer shopping trip to a larger retail centre.

The current Ballina community is indicative of a skew towards middle aged couples and retirees earning below average incomes. As the release area develops, the demographic characteristics of the future population will be linked to the dwelling yield and built form. The development of the Cumbalum precinct will see a more diverse housing product than is currently available, thereby attracting a more diverse population to the area.

This diversity is expected to take the form of a demographic profile that is similar to the current trade area but with fewer numbers of people per household.

5.3 Capacity for Growth

The subject site is located within the urban expansion area that is located primarily to the south of Ross Lane. This area is expected to be dominated by residential development at higher densities than currently exhibited in the area. The remainder of the trade area will is expected to host some additional residential development.Population Projections

Tables 3 and 4 outlines the anticipated population growth within the Trade Area (high and low growth scenarios - based on possible density options). The population projections have been based on the 2011 ABS Census and the planning intent for the area. The projections contain estimates of on-site population for the period to 2021, however, it is the population at capacity that will drive the need for local services and is the key factor in this assessment. Simply put, the quicker the area develops the sooner the need is in place for the retail and activity centre functions.

Table 3 Trade Area Population Projections – Low Scenario

	2013	2016	2021	Capacity
Population				
Trade Area	511	550	1,039	5,477
Household Size				
Trade Area	2.75	2.55	2.50	2.50
Households				
Trade Area	186	216	416	2,191

Source: 2011 ABS Census, RPS

Table 4 Trade Area Population Projections – High Scenario

	2013	2016	2021	Capacity
Population				
Trade Area	511	627	1,239	6,735
Household Size				
Trade Area	2.75	2.55	2.50	2.50
Households				
Trade Area	186	246	496	2,694

Source: 2011 ABS Census, RPS

5.4 Expenditure Characteristics

The following calculations are based on the average household expenditure of trade area residents derived from the 2011 census and the 2009/10 ABS Household Expenditure Survey. The average annual household retail expenditure in the Trade Area is estimated to be $26,600 per annum, this is detailed in Appendix B.

6.0 Market Share Analysis

6.1 Supportable Retail Floorspace

The retail floorspace supportable on the subject site and its identified trade area will be dependent upon the market share it will capture. Based on previous experience RPS considers the following ranges to be generally indicative of current shopping patterns and their capture of available retail expenditure:

- CBD and Main Street – 10% to 30%
- Regional Centres – 8% to 15%
- Sub-Regional Centres – 13% to 18%
- Supermarket Anchored Centres – 20% to 30%
- Convenience Centres – 8% to 15%
- Bulky Goods (precinct and centres) – 20% to 30%

Tables 5 and 6 provides a market share and floorspace analysis to assess the need and demand generated by residents of the defined trade area. Key features and findings include:

- A market share of 15% of total retail expenditure from the defined trade area has been selected as it represents a realistic market share associated with centres of this size (taking into account current and likely future retail/centres infrastructure). The ease of accessibility provided by Ross Lane has been balanced against the demographic needs of the catchment and other centres in the region.
- Inflow patronage (or patronage derived from Ross Lane vehicular traffic not resident in the trade area) is estimated at a modest 5%.
- The estimated market shares are also supported by the following:
  - Future growth in local traffic
  - Ease of access
  - Complementary role and function to other (existing and proposed) centres including Lennox Head and Ballina.
- The total estimated turnover for the centre (foodservice and retail) is $8.5 million at capacity for the low population scenario and $10.5 million for the high population scenario.
- At an average turnover (productivity rate) of $4,500 per square metre, this indicates that the floorspace proposed will be justifiable at capacity will be 2,300 Sq M (low scenario) and 2,850 Sq M (high scenario)
- The retail component of the local centre could be accommodated on a 1Ha site.
- The subject site will be complementary to all existing and proposed centres in Ballina Shire. At capacity, the residents of trade area will direct between $45 million and $56 million of retail expenditure to higher order centres, with the Ballina centres being the prime recipients. This expenditure will generate between 300 and 400 retail jobs in these other centres.

Table 5 Market Share and Retail Floorspace Analysis – Low Growth Scenario

	2013	2016	2021	Capacity
Households	186	216	416	2,191
Household Exp	$24,648	$24,648	$24,648	$24,648
Total Hhold Expenditure	$4,578,983	$5,318,425	$10,248,038	$53,998,980
Market Share	15%	15%	15%	15%
Trade Area Expenditure	$686,847	$797,764	$1,537,206	$8,099,847
Inflow and passing traffic	5%	5%	5%	5%
Inflow and passing Expenditure	$36,150	$41,988	$80,906	$426,308
Total Turnover Potential	$722,997	$839,751	$1,618,111	$8,526,155
Productivity Rate	$4,500	$4,500	$4,500	$4,500
Justifiable Retail Floorspace	161	187	360	1,895
Other Floorspace	35	41	79	417
Total Floorspace	196	228	439	2,312

Source: RPS

Table 6 Market Share and Retail Floorspace Analysis – High Growth Scenario

	2013	2016	2021	Capacity
Households	186	246	496	2,694
Household Exp	$24,648	$24,648	$24,648	$24,648
Total Hhold Expenditure	$4,578,983	$6,057,867	$12,219,883	$66,401,887
Market Share	15%	15%	15%	15%
Trade Area Expenditure	$686,847	$908,680	$1,832,982	$9,960,283
Inflow and passing traffic	5%	5%	5%	5%
Inflow and passing Expenditure	$36,150	$47,825	$96,473	$524,225
Total Turnover Potential	$722,997	$956,505	$1,929,455	$10,484,508
Productivity Rate	$4,500	$4,500	$4,500	$4,500
Justifiable Retail Floorspace	161	213	429	2,330
Other Floorspace	35	47	94	513
Total Floorspace	196	259	523	2,842

Source: RPS

6.2 Child Care

At capacity, the Cumbalum Precinct B is anticipated to comprise approximately 2,200 to 2,700 dwellings, equating to 5,500 to 6,700 residents depending on the housing mix. This population is expected to comprise of approximately:

- 5% to 7% preschoolers;
- 7% to 9% primary school age children;
- 6% to 8% high school age children; and
- 15% to 17% retirees (over 65 years of age).

6.2.1 Trends in Child Care

In 2011 the ABS released child care utilisation rates for various types of child care[1]. This publication presents estimates of child care arrangements and early childhood education and learning, compiled from the June 2011 Childhood Education and Care Survey (CEaCS) which is the most recent data available on the child care industry.

- The child care usage rate in 2011 for 0 to 5 year olds in NSW was 35%, which includes formal child care services such as long day care, before and after school care, and other formal care services.
- The child care usage rate in 2011 for 0 to 5 year olds in Australia was also 35% for formal child care services.
- The national average for 0 to 5 year old long day child care in 2011 was 28%, compared with 27% in NSW.
- The national average for 0 to 4 year old child care usage in 2011 was 32%.

6.2.2 Child Care Demand

An increase in demand for child care facilities across NSW is a result of the emerging social trends and changes in the demographics of the state.

- There has been an increase in part time work, casual and flexible working hours resulting in a rise in the number of women with young children re-entering the work force and utilising child care facilities.
- A shift has also occurred in household structure as there are an increasing number of lone-parent households as well as dual income households. Single parents and working parents require formal and informal child care services in order to care for their child/children whilst at work.

The catchment population will generate demand for between 100 and 175 child care places. The actual demand will depend on the demographic and workface profile of the community. It is recommended that the local centre include 2 child care centres with a combined capacity of 175 places. A total land size of 2,500 Sq M is recommended.

In practice, the two child care centres (with up to 175 places) would be located on adjacent sites and would be managed by the same operator to provide economics of scale. An alternative is to plan for a single 80-100 place child care centre in local centre with another site identified for the second child care centre. The second option provides the benefits of choice and competition (with the introduction of a new operator) but

[1] ABS Childhood Education and Care 4402.0 June 2011

producing a viable second site can be difficult if the population does not reach the upper limit of the projections. The co-located centres option is preferred as it allows the combined facility to be scaled to the needs of the community.

6.3 Other Uses

6.3.1 Small Office Home Office (SOHO)

Approximately half of the 6,750 future residents of the catchment will be engaged in the workforce on a full-time or part-time basis. It is estimated that approximately 12% of this workforce will work from home or work at home. This can vary from a tradesperson working one day a week from home to professional and personal services actively engaged with the community from a home setting and generating specific work-related visits.

It is estimated that approximately 400 people will be working from the community when the population reaches capacity. In the order of 1.5% to 3% of these will likely desire a SOHO type location near the local centre and offering distinct work and home components of the building. It is recommended that allowance be made for 6 to 12 SOHO style dwellings in proximity to the local centre and offering dual access. In this case, the front of the SOHO could be designated as the work entrance while the rear of the dwelling (off a laneway etc) could be the everyday (residential) access. The remaining people that work from home and live in the community will do so in a standard dwelling with little or no negative amenity impacts on their neighbours.

The market opportunity for the SOHO dwellings will be directly linked to the overall appeal of the community and the appeal and role of the local centre. An attractive and vibrant local centre that is the hub of community activity will generate demand for SOHO dwellings. A small, isolated functional shopping centre will not underpin the emergence of this form of residential/commercial product.

Traditional market resistance to this product means that a small number of units (perhaps two or three) should be built in the initial stages as demonstration product with a capacity of being utilised for short-term uses such as sales offices.

6.3.2 Service Station

The catchment population required to support a service station is in the order of 5,000 people. Consequently the subject catchment will be able to support a suitably scaled service station. This could take the form of a stand-alone service station or a series of petrol pumps controlled from one of the retail stores. For planning purposes, we recommend that the site be flexible enough to accommodate a stand-alone service station on a 4000 Sq M site.

6.3.3 Medical Centre

A community of up to 6,700 people will have a requirement for medical services and facilities; this would commonly be delivered in the form of a medical centre staffed by a number of general practitioners. A medical centre is not recommended for the subject site as the scale of the catchment will make it difficult to obtain a pharmacy licence. A catchment of 8,000 people and compliance with a number of other rules and conditions is generally required to attract a pharmacy to a new residential growth area.

Contemporary medical centres require the presence of a pharmacy in order to provide the range of services typically demanded by the consumer base.

Residents of the catchment will need to visit higher order centres at Lennox Heads and Ballina in order to obtain medical services and pharmaceutical products.

6.4 Location

The current plan (see Appendix C) shows the local centre on the south west corner of Ross Lane and the estate entrance road. From a market/consumer perspective a location on the south east corner is preferred. The south east corner allows patrons turning from Ross Lane to undertake a simple left in – left out manoeuvre in order to 'drop into' the shops on the way home. This shopping trip (dropping in on the way home) typically accounts for 60% to 75% of the turnover for this type of centre. The importance of this convenience cannot be overstated with straightforward traffic access underpinning the viability of the majority of likely tenants.

6.5 Summary and Conclusion

Issues	Inclusions	Site Size
What retail and related uses should be accommodated on site? (Including the size and function of the supermarket).	A 3,000 Sq M local centre is recommended. This will consist of : • A convenience supermarket (max GFA of 1,400 Sq M) • 1.600 Sq M of specialty retail (convenience, impulse, food services and professional/personnel services)	A 1Ha site is recommended.
Should the centre contain a child care centre?	The catchment has a potential demand of between 100 and 175 child care places (at capacity). It is recommended that allowance be made for two child-care centres (to allow for staging) with a potential total capacity of 175 children.	A 2,500 Sq M (total) site is recommended for the two centres.
What other uses could be included in the local centre?	• Service station on a 4,000 Sq M site • Community hall (on a 2,000 sq M site) • 6 to 12 SOHO dwellings – on the fringe of the centre and each offering about 150 Sq M to 180 Sq M of built araa. • Open space (parks and linkages)	The retail, commercial and community components could be established on a 6,000 Sq M site. The SOHO units would be developed on adjacent land and are not included in this calculation. This additional area does not include open space, parks or linkages.

Issues	Inclusions	Site Size
What is the short, medium and long term demand for the centre taking into account the subject development and nearby release areas? Is a 3 Ha site the appropriate size? If not, what site size is required?	The centre will need to be developed in stages in line with the population growth of the community. It is estimated that the first stage of the retail component will be 1000 Sq M GFA anchored by a small (500 Sq M) convenience supermarket. It is important that the supermarket has the capacity to expand over time.	If tightly planned - the retail, child centre, and other elements of built form (not including the SoHo units) could be accommodated on a 2 ha site. This figure does not include open space, connections, district park or other community uses. The 3 ha site would provide a degree of flexibility in the planning and delivery of the local centre. However, it may be excessive for the needs of the community and the planning and layout of the local centre should allow for any surplus land to be developed for residential users.
Is the centre suited to the Ross Lane location? Which development options are suitable from a market perspective?	In order to service the local catchment and the wider community (as required by the relevant planning instruments) it is essential that the local centre be established in proximity to Ross Lane. This will require a high degree of visibility and legibility for the main entrance road with the scale and inclusions in the centre (particularly the service station) being readily apparent to passing traffic.	A centre located away from Ross Lane will fail to fulfil the community service objectives required by the planning scheme. Additionally, it is likely that only some core retail uses will be viable and a number of retail/commercial uses will not become established. This will have a flow on effect of reducing the appeal of the centre and limiting the capacity of the precinct to develop nonretail sources of appeal such as SOHO, child care and the service station.

7.0 Impact Assessment

7.1 Introduction

This section assesses the economic need and impact for the proposed local centre at Ross Lane. This centre will cater to a local catchment of approximately 2,700 households at capacity as well as a portion of passing traffic along Ross Lane. Residents and inflow traffic will be attracted to the site by ease of access to the convenience retail, takeaway restaurant and the expected range of service, convenience and other retail uses.

7.2 Need and Impact Assessment

The following questions and answers address these issues as well as the need and impact of the proposed shopping centre.

7.2.1 Is there economic need for the proposed centre on the subject site?

Yes. The economic need for the proposed centre is generated by the following:

- The population about 2,700 households (at capacity) will have a significant call for convenience retail products.
- The Trade Area is likely to continue to exhibit a demographic profile of lower income households and families with children. This demographic is often time constrained and will benefit from the proximity and accessibility of a local shopping centre with a convenience store (particularly for impulse shopping on the homebound trip).
- The proposed centre will have no impact on the viability or role and function of any other centre or precinct in the Ballina Shire.
- The proposed floorspace is supportable and justifiable when compared with the expenditure profile of trade area residents.

7.2.2 Is the subject site suitable for the proposed expansion?

Yes. The site is suitable as it is proximate to the expansion population and provides the only viable opportunity to establish a viable local centre.

7.2.3 Will the proposed development on the subject site benefit the community?

Yes. The benefits will include the following:

- The addition of a convenience store and specialty stores in the centre will provide competition and choice for trade area residents. This will be particularly beneficial for working families and residents who have low household incomes.
- The enhanced competition and choice provided by the proposed centre will mean that fewer local residents will need to travel to the larger or more distant centres. This will benefit time poor working families and will also generate cost savings in terms of transportation.
- The provision of 3,000 Sq M of new retail and food services floor space, child care centres, service station and SOHO units will generate an estimated 120 to 160 equivalent full-time jobs. These jobs will provide opportunities for local residents, particularly working mothers, who might otherwise have to

travel some distance to gain employment.

7.2.4 Will the proposed development have any unsustainable impacts on existing centres?

No.

- The new catchment population will direct an additional $45million to $56 million of household retail expenditure to Lennox Heads and Ballina. Only 15% of local expenditure will be retained in the local centre.
- The increase in the shires population can only improve the market performance of these areas.
- There will be no material impacts generated by the proposed centre on any other centre or precinct.
- The level of services provided to local residents will be enhanced by the proposed centre.

Consequently the provision of a new local centre at Ross Lane will not negatively impact the nature of the Ballina Shire retail hierarchy. Further, the centre will provide a significant range of benefits for local residents.

Appendix A - Demographic Profile

Demographic Profile	Trade Area		Ballina LGA		NSW	
Total Persons	496		39,274		6,917,658	
Age						
0 to 4	27	5.4%	2,138	5.4%	458,735	6.6%
5 to 14	72	14.5%	4,904	12.5%	873,776	12.6%
15 to 19	43	8.7%	2,396	6.1%	443,416	6.4%
20 to 24	20	4.0%	1,597	4.1%	449,687	6.5%
25 to 34	43	8.7%	3,280	8.4%	941,496	13.6%
35 to 44	66	13.3%	4,889	12.4%	971,629	14.0%
45 to 54	85	17.1%	5,778	14.7%	950,451	13.7%
55 to 64	76	15.3%	5,844	14.9%	810,290	11.7%
65 to 74	34	6.9%	4,120	10.5%	541,687	7.8%
75 to 84	23	4.6%	2,929	7.5%	336,756	4.9%
85 years and over	7	1.4%	1,398	3.6%	139,735	2.0%
Marital Status - Persons						
Married	194	48.3%	16,053	49.8%	2,758,853	49.4%
Separated	14	3.5%	1,044	3.2%	170,429	3.1%
Divorced	32	8.0%	3,507	10.9%	461,146	8.3%
Widowed	14	3.5%	2,620	8.1%	324,517	5.8%
Never Married	148	36.8%	9,008	27.9%	1,870,202	33.5%
Total	402		32,232		5,585,147	
Language Spoken at Home						
English Only	434	94.1%	36,545	96.6%	5,013,344	76.3%
Other	27	5.9%	1,285	3.4%	1,554,333	23.7%
Total	461		37,830		6,567,677	
Relationship in Household						
Husband or wife in registered marriage	166	37.7%	14,573	39.8%	2,514,378	39.2%
Partner in de facto marriage	29	6.6%	2,787	7.6%	418,722	6.5%
Lone parent	32	7.3%	1,935	5.3%	297,904	4.6%
Child under 15	75	17.0%	6,689	18.3%	1,256,031	19.6%
Dependent student (15-24)	31	7.0%	1,616	4.4%	339,163	5.3%
Non-dependent child	31	7.0%	1,813	5.0%	429,512	6.7%
Other related individual	7	1.6%	622	1.7%	152,902	2.4%
Unrelated individual living in family h/hold	3	0.7%	307	0.8%	66,691	1.0%
Group household member	23	5.2%	1,162	3.2%	210,927	3.3%
Lone person	22	5.0%	4,263	11.6%	599,150	9.3%
Visitor (from within Australia)	21	4.8%	848	2.3%	129,681	2.0%
Total	440		36,615		6,415,061	
Household Structure						
Couple with no children	52	38.5%	4,915	44.9%	669,019	36.6%
Couple family with children	54	40.0%	3,978	36.3%	831,850	45.5%
with children under 15	32	23.7%	2,761	25.2%	560,605	30.6%
no children under 15	22	16.3%	1,217	11.1%	271,245	14.8%
One parent family	29	21.5%	1,935	17.7%	297,904	16.3%
Other family	0	0.0%	125	1.1%	30,780	1.7%
Total	135		10,953		1,829,553	
Internet Connection						
None	30	19.0%	3,577	22.9%	495,949	20.1%
Broadband	116	73.4%	10,434	66.9%	1,726,472	69.9%
Dial up or Other	12	7.6%	1,060	6.8%	158,936	6.4%
Total with connection	128	81.0%	11,494	73.7%	1,885,408	76.3%
Not Stated	0	0.0%	525	3.4%	89,940	3.6%
Total	158		15,596		2,471,297	
Average Number of Cars	2.00		1.62		1.59	

Source: ABS 2011 Census, RPS (Current Dollars - Mar 2013)

Demographic Profile	Trade Area		Ballina LGA		NSW	
Dwelling Type (Occupied -private)						
Separate house	160	100.0%	11,096	71.1%	1,717,701	69.5%
Semi-detached and townhouse	0	0.0%	1,997	12.8%	263,926	10.7%
Flat, unit, apartment	0	0.0%	1,998	12.8%	465,188	18.8%
Other dwelling	0	0.0%	501	3.2%	21,141	0.9%
Not stated	0	0.0%	4	0.0%	3,343	0.1%
Total Occupied	160	100.0%	15,596	100.0%	2,471,299	100.0%
Total Occupied Private Dwellings	160	86.0%	15,596	90.4%	2,471,299	90.3%
Unoccupied Private Dwellings	26	14.0%	1,654	9.6%	265,338	9.7%
Total Private Dwellings	186		17,250		2,736,637	
Persons per Household						
Separate house	2.75		2.59		2.83	
Semi-detached and townhouse	NA		1.96		2.31	
Flat, unit, apartment	NA		1.67		1.95	
Other dwelling: Total	NA		1.59		1.78	
Not stated	N/A		4.00		2.10	
Total	2.75		2.36		2.59	
Dwelling Ownership						
Fully owned	63	40.4%	6,274	40.2%	820,006	33.2%
Being purchased directly	42	26.9%	4,169	26.7%	824,293	33.4%
Rented	45	28.8%	4,550	29.2%	743,050	30.1%
Other Tenure	3	1.9%	200	1.3%	20,418	0.8%
Not Stated	3	1.9%	404	2.6%	63,529	2.6%
Total	156		15,597		2,471,296	
Monthly Housing Loan Repayments						
Average Repayment - Sept 2011 $	$1,926		$1,843		$2,132	
Average Repayment - Current $	$1,937		$1,854		$2,145	
Weekly Rent						
Average Rent - Sept 2011 $	$364		$284		$320	
Average Rent - Current $	$366		$286		$322	
Household Income						
Average Weekly - Sept 2011 $	$1,240		$1,206		$1,537	
Average Weekly - Current $	$1,247		$1,213		$1,546	
Average Annual - Sep 2011 $	$64,656		$62,878		$80,120	
Household Income - Current $	$65,041		$63,252		$80,597	

Source: ABS 2011 Census, RPS (Current Dollars - Mar 2013)

Appendix B - Expenditure Profile

Household Expenditure Characteristics		
		Trade Area
Convenience		
Food and non-alcoholic beverages *		$140.37
Alcohol for consumption off licensed premises		$19.05
Books, newspapers, magazines and other printed material		$8.49
Cleaning and Related *		$15.75
Dry cleaning and related		$0.77
Hair and personal services		$8.88
Lottery tickets and lotto		$4.39
Medicines, pharmaceutical products etc		$24.77
Personal care *		$11.95
Stationery equipment		$4.15
Tobacco products *		$15.25
	Weekly Sub Total	$253.83
	Annual Sub Total	$13,234.60
Derived Supermarket Expenditure (categories marked* plus 10% for general merchandise)		
	Weekly Sub Total	*$201.66*
	Annual Sub Total	*$10,514.32*
Clothing and Footwear		
	Weekly Sub Total	$36.34
	Annual Sub Total	$1,895.01
Large Floorspace Comparison/Destination Retailers		
Audio-visual equipment and parts		$12.65
AV Media		$5.90
Household Appliances		$12.79
Home computer equipment (including pre-packaged software)		$7.45
Household furnishings and equipment		$35.52
Motor vehicle parts and accessories		$10.60
Camping and sports		$3.31
Tools and related		$7.81
	Weekly Sub Total	$96.04
	Annual Sub Total	$5,007.32
Other Retail		
Animal Expenses		$7.72
Other recreational and educational equipment		$7.06
Glassware and cutlery		$3.76
Travel goods, handbags and related		$1.86
Watches and jewellery		$3.81
	Weekly Sub Total	$24.20
	Annual Sub Total	$1,261.86
Food and Beverage		
Meals in restaurants, hotels, clubs		$24.29
Fast food and takeaway		$27.87
Alcohol for consumption on licensed premises		$10.16
	Weekly Sub Total	$62.32
	Annual Sub Total	$3,249.28
Weekly Total		$60.55
Annual Total		$3,156.87
Weekly Total Household Retail Expenditure		**$472.73**
Annual Total Houshold Retail Expenditure		**$24,648.06**
Source: RPS Economics ABS		
Note: All figures in March 2013 Dollars		

Appendix C - Site Layout

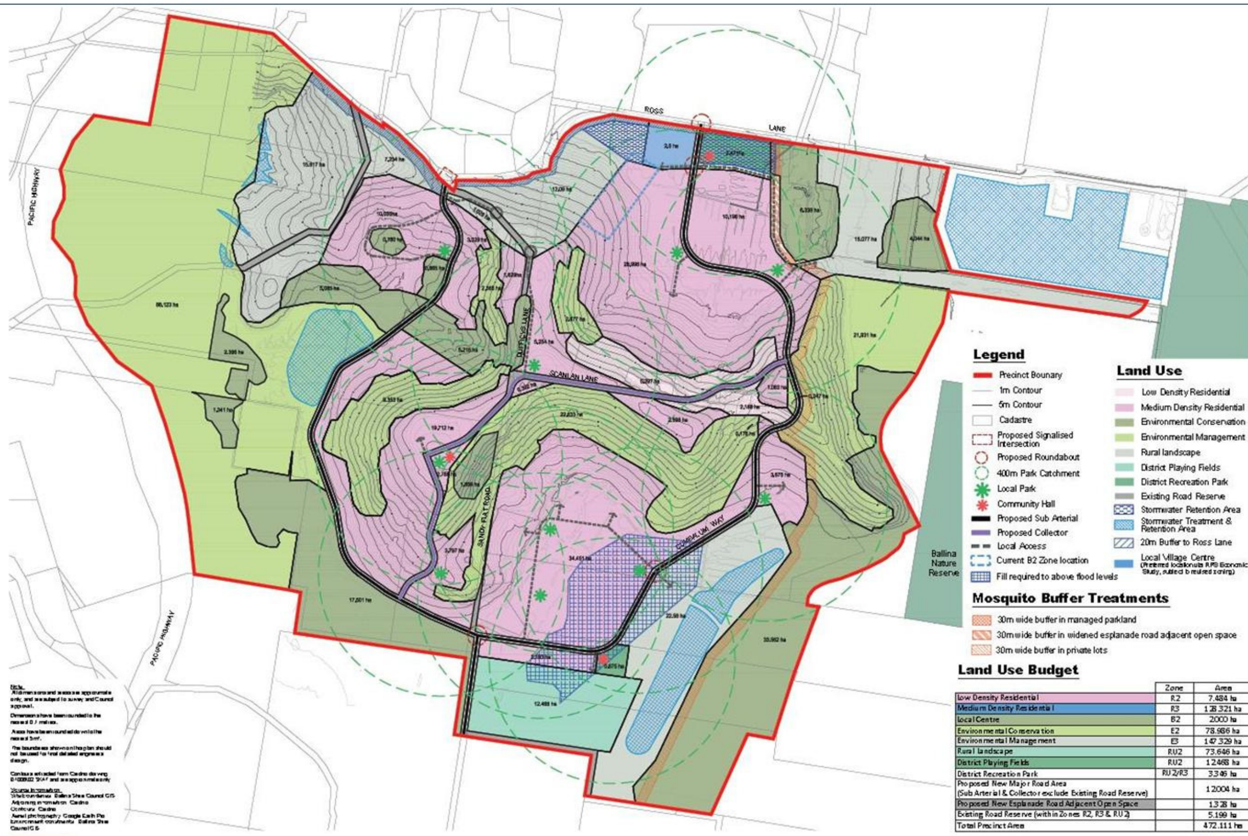


FIGURE 1 - Tintenbar Village Structure Plan

Planning Resolutions

Phone: (02) 66859957
Mobile: 0437 859959
Email: chris@planningresolutions.com.au
Mail: PO Box 1133
Byron Bay

Paul Hickey
General Manager
Ballina Shire Council
PO Box 450
Ballina 2478

Attn Simon Scott

Dear Paul,

Re: Tintenbar – Cumbalum Precinct B – Staged Development Application

I refer to Council's letter dated 4 February 2013 in regard to the Cumbalum Precinct B staged development application and ask that you reconsider your position expressed in that letter in regard to the lodging of a staged development application in terms of Clause 4.5 of the Cumbalum Precinct B Voluntary Planning Agreement.

The Planning Proposal in regard Mr Richard Walsh's holdings has now been sent to the NSW Department of Planning for finalisation. The Preliminary Draft Development Control Plan has now been finalised and has been provided to Council. We have now been advised that this Preliminary Draft Development Control Plan will be presented to Council for adoption for purposes of public exhibition on 20 January 2014.

Therefore pursuant to Clause 4.5 of the Cumbalum Precinct B Voluntary Planning Agreement we formally request Council's written consent to the lodgement of a staged development application on or after 10 February 2014. The staged development application would obviously only apply to those parts of Richard Walsh's holdings that have been zoned for urban development at the time.

I look forward to your favourable reply. Should you require any clarification of the above information please contact me on 66859957.

Yours faithfully
Chris Pratt
Planning Resolutions
26 November 2013