Forster – Tuncurry Employment Land Implementation Strategy

PREPARED FOR

Great Lakes Council

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Terminology

Name	Abbreviation
Australian and New Zealand Standard Industrial Classification	ANZSIC
Mid-North Coast Regional Strategy 2008	The Regional Strategy
NSW Department of Planning	DoP
Local Environmental Plan	LEP
Local Government Area	LGA
Australian Bureau of Statistics	ABS
Location Quotient	LQ
Transport Data Centre	TDC
Standard Instrument (Local Environmental Plans) Order 2006	Standard LEP Template
Draft Great Lakes Employment Land Strategy 2006	draft GLELS 2006
Urban Density and Design Review 2008	UDDR 2008
Greater Metropolitan Area	GMA
Sydney Statistical Division	Sydney SD
Forster Tuncurry Chamber of Commerce	Chamber of Commerce

1. EXECUTIVE SUMMARY

Forster - Tuncurry has been identified by the NSW Department of Planning as an appropriate centre for *'significant further residential development*[1]*'*. Based on Council's population forecasts[2], Forster - Tuncurry will experience a 45% population increase by 2031 from a base of 18,372[3] in 2006. This would result in an additional 8,300 people living in the study area and increase the resident population to 26,500.

Population growth has a direct relationship with demand for employment and local services. The draft Great Lakes Employment Lands Strategy 2006 recognised this correlation and highlighted that a significant amount of additional retail, commercial and industrial land would be required within the Great Lakes LGA (and in particular Forster- Tuncurry) to meet the needs of the future population.

To better understand the degree and nature of future demand, and adequately plan for this increase, Great Lakes Council commissioned Hill PDA to prepare a more detailed analysis of employment and the supply and demand of employment lands in Forster - Tuncurry. Forster - Tuncurry is the largest centre in Great Lakes LGA generating over 64% of all employment within the LGA. As the LGA's only Major Town[4], Forster - Tuncurry was chosen as the first centre to become the subject of a more detailed Employment Lands Implementation Strategy.

During the preparation of the Implementation Strategy and its recommendations, due consideration has been given to the findings of previous studies. Rather than replicating the research undertaken by these studies, the Implementation Strategy has sought to integrate them and update them with more recent data, and build on their recommendations. The Strategy has also sought to incorporate the principles and concepts identified in the Strategic Plan for the Economic Development of the Great Lakes Area (2003) and the Urban Density and Design Review (2008).

The Implementation Strategy provides Council with a clear framework on which to plan for the provision of retail, commercial, bulky goods and industrial activities, so as to satisfy demand over the next 25 years within Forster - Tuncurry. It accords with the strategies identified by the Mid-North Coast Regional Strategy 2008 and Council's vision to be:

"a leader in the provision of infrastructure and services which sustain and enhance the natural environment and achieve a quality lifestyle for residents and visitors".

The Implementation Strategy seeks to provide greater clarity and detail with respect to:

- the current supply and availability of employment land;
- current and future demand for employment land up to 2031; and
- how much land should be provided for employment purposes, what type, when and where.

[1] Draft Mid-North Coast Regional Strategy 2006 – 2031, NSW DoP
[2] Council population growth rate of 1.5% per annum
[3] ABS Census 2006
[4] Draft Mid-North Coast Regional Strategy 2006 – 2031, NSW DoP

The Strategy also provides recommendations regarding:

- what an appropriate hierarchy of activity centres could be and how the hierarchy could guide business;
- appropriate controls and conditions that should be applied to achieve desired outcomes;
- potential impacts of implementing these recommendations;
- potential impacts of implementing recommendations to current employment precincts; and
- what mechanisms and strategies Council could use to achieve the desired outcomes.

1.1 Existing Labour Force

A number of key social characteristics influence the scale and character of Forster - Tuncurry's labour force. Age is one example of such a characteristic. Forster - Tuncurry has a very high representation (32%) of persons over the age of 65 years. By 2031 it is estimated that this cohort will represent 40% of Great Lakes residents. This socio-demographic profile, coupled with lifestyle characteristics, results in a labour force participation rate for Forster - Tuncurry of 34%. This rate is low when compared to Great Lakes LGA (36%) and even lower when compared to the NSW labour force 2006 participation rate of 47%.

The high rate of part time or casual employment also defines employment in Forster - Tuncurry. In 2006 only 49% of Forster - Tuncurry's labour force was employed full time. For NSW, at that time, the figure was 60%. This employment characteristic may be indicative of 'underemployment' in Forster - Tuncurry or the inability of the labour force to find full time employment. This is an important social issue in light of the comparatively high unemployment rates experienced by Forster - Tuncurry (10.3% as of the 2006 Census night) compared to an average of 5.9% for NSW.

The higher rate of unemployment and potentially underemployment may be a result of a number of business and social factors. One such factor being the education and skills of the local labour force. Forster - Tuncurry also has a low proportion of residents (23%) that have completed schooling to Year 12, or have undertaken post school education, when compared to the Mid North Coast Region (27%) and Sydney Statistical Division (SD) (49%). The importance of an educated and skilled labour force is becoming increasingly apparent with the growth of the 'New Economy' and its emphasis on the knowledge worker, innovation and research for successful business development.

1.2 Existing Employment & Industry

9,087 jobs were provided in Great Lakes LGA as of the 2006 Census[5]. The LGA however, had a labour force of 10,600 people[6]. A high proportion (84%) of the Great Lakes labour force was employed in local jobs representing a very high job containment rate. The high containment rate is desirable as it reduces the need for residents to

[5] Journey to Work Data, TDC 2006

[6] ABS Census 2006

travel and therefore place greater strain on infrastructure and the environment. It also indicates that labour force skills suitably match job provision.

The remaining 28% of the Great Lakes labour force travelled outside of the LGA to alterative workplace destinations. The bulk of this category (7%) travelled to Greater Taree for employment. Conversely 1,500 workers travelled from areas outside of Great Lakes to the LGA for employment.

As of 2006, Forster - Tuncurry generated 5,777 jobs representing 64% of all jobs in Great Lakes. The main employment generating industries were:

- Retail Trade (1,038 jobs or 19% of jobs);
- Accommodation and Food Services (704 or 12% of jobs);
- Health Care and Social Assistance (885 or 13% of jobs);
- Construction (416 or 7% of jobs);
- Education and Training (437 or 7% of jobs); and
- Public Administration and Safety (380 or 7% of jobs)[7].

With respect to job distribution, 61% of all jobs in Forster – Tuncurry (hereafter referred to as the Study Area) were generated in Forster, 31% in Tuncurry and 8% in Forster Keys[8].

1.3 Existing Employment Land Supply

In order to inform the Strategy's supply and demand projections, detailed floorspace surveys were undertaken of Forster - Tuncurry's centres. Analysis was also undertaken of Forster - Tuncurry's existing employment lands and their tenants.

As of 2008[9] Forster - Tuncurry provided approximately 68,750sqm of occupied retail floorspace and 4,380sqm of vacant shop front space. The largest share (68% or 47,000sqm) of occupied space was provided within the Breese Parade Town Centre (located at the corner of Breese Parade and The Lakes Way).

Wharf Street, Forster provided 10,000sqm of occupied retail floorspace at the time of survey with a further 2,100sqm of vacant shopfront space (17%). Manning Street, Tuncurry provided a strikingly similar portion of occupied space (10,000sqm) and 2,000sqm of vacant space again representing 17% of the total centre.

Over 1,600sqm of retail floorspace was provided in smaller centres such as Forster Keys, Fairways and Lake Street.

At the time of survey, the Breese Parade Town Centre also provided 7,200sqm of commercial floorspace. A large portion of this figure includes the Council premises, yet the calculations exclude civic buildings in the centre such as the library. Wharf Street, Forster provided 5,900sqm of commercial floor space and Manning Street, Tuncurry 6,350sqm.

[7] ABS Census 2006

[8] ABS Census 2006

[9] Based on retail survey conducted by Hill PDA and Great Lakes Council in July 2008

The provision of bulky goods premises has grown within recent years in the Study Area with a sizeable cluster in the Breese Parade Town Centre. The Study Area has 17 bulky goods premises in total providing over 18,000sqm of floorspace.

The Study Area also provides 54ha of zoned industrial land. This land area incorporates the aforementioned bulky goods floorspace. There are two primary or strategic industrial precincts in the locality known as Forster Industrial Area (located within the Breese Parade Town Centre) and Tuncurry Industrial Area (located north of the Manning Street, Tuncurry Centre).

Forster Industrial Area is estimated to have a total site area of 20.3ha. The Forster Industrial Area had a low vacancy rate at the time of survey of 13.6%, indicating a relatively strong business preference and demand for locating within the precinct.

The Tuncurry Industrial Area covers 26.4ha. It had a higher vacancy level than the Forster Industrial Area (46%) at the time of survey. This high vacancy rate is skewed however by one large vacant lot within the precinct that is in single ownership. Excluding this 11ha site from the calculations, the vacancy rate would decrease to 9.5%.

A secondary industrial precinct is known as the Sweet Pea Road Industrial Area. It is estimated that the undeveloped industrial zone covers an area of approximately 7.3ha.

1.4 Employment Forecasts

In order to estimate potential employment growth within Forster - Tuncurry between 2006 and 2031, Hill PDA applied three different forecasting methods. These methods were based on:

1. an aspirational target based on population growth;
2. the continuation of historical employment trends and industry market shares; and
3. an aspirational target based on a comprehensive review of the Study Area's strengths, opportunities, weaknesses and threats in view of wider economic and employment trends.

The latter method was identified as the most detailed and tailored approach for Forster - Tuncurry. It found that the Study Area could experience employment growth in the order of 3,300 jobs by 2031. This represents a 57% increase on existing jobs.

The table below shows the projected growth in jobs by industry over the study period. The table has applied various assumptions for the forecasts. These assumptions have been made on an industry by industry basis, dependant on economic trend forecasts associated with the given industry, the industry's correlation to population growth and / or analysis of what would be an appropriate market share.

Table 1 - Preferred Job Growth Scenario for Forster – Tuncurry 2006 – 2031

Industry Category	2006	2016	2031	Shift 06 - 31	Market Share 2031
Agriculture, Forestry and Fishing	113	125	145	32	1.6%
Mining	-	-	-	-	0.0%
Manufacturing	297	297	297	-	3.3%
Electricity, Gas, Water, Waste	144	167	209	65	2.3%
Construction	416	460	533	117	5.9%
Wholesale Trade	87	91	99	12	1.1%
Retail Trade	1,038	1,355	2,020	982	22.3%
Accommodation and Food Services	704	919	1,370	666	15.1%
Transport, Postal and Warehousing	145	168	210	65	2.3%
Information Media Tele - comms	41	48	59	18	0.7%
Financial and Insurance Services	142	165	206	64	2.3%
Rental, Hiring & Real Estate	181	210	263	82	2.9%
Professional, Scientific, Technical	232	269	337	105	3.7%
Administrative and Support Services	112	130	163	51	1.8%
Public Administration and Safety	380	441	551	171	6.1%
Education and Training	437	507	634	197	7.0%
Health Care & Social Assistance	885	1,027	1,284	399	14.2%
Arts and Recreation Services	124	162	241	117	2.7%
Other Services	269	312	390	121	4.3%
Inadequately described	30	35	44	14	0.5%
Total Job Growth	**5,777**	**6,888**	**9,056**	**3,279**	

Source: TDC 2006, Hill PDA

As the preferred approach, the results of this method and the employment forecasts shown in Table 1 above were applied to all land and floorspace demand assessments.

1.5 How Much Land should be Provided, Where and When?

Based on the forecast growth in employment for Forster - Tuncurry over the study period demand for retail, commercial and industrial land and floorspace was calculated. This analysis was also informed by the findings of past relevant studies in addition to community and stakeholder consultation.

With respect to retail, it was found that by 2031 there would be demand for an additional 22,500sqm of retail floorspace. For the purposes of this study, retail demand relates to the amount of floorspace required in the Study Area to meet the full range of shopping needs of residents and visitors. This includes supermarket and grocery retail, clothing, gifts, household goods and personal services.

The surveyed figure of 22,500sqm takes into consideration existing supply, expenditure generated from tourism as well as expenditure lost / gained from surrounding areas. As shown below, assuming no additional supply, the Study Area will need additional supermarket and grocery space, specialty food stores, catered foods, bulky goods and department / discount department stores by 2031.

Table 2 below shows forecast demand for retail by retail category at key milestones (2006, 2016 and 2031) over the study period. Demand is then cross referenced with existing supply to find additional floorspace required. The figures highlighted in red subsequently represent an undersupply, whilst the blue colour represents an oversupply, or that there is sufficient floorspace provision to meet the demand generated in the given category at that time.

Table 2 - Forecast Change in Demand for Retail Floorspace by Category 2006 – 2031(sqm)

Retail Category	2006 Demand	Additional Required	2016 Demand	Additional Required	2031 Demand	Additional Required
Supermarkets & Grocery Stores	9,220	2,780	11,226	774	15,317	- 3,317
Specialty Food Stores	4,333	- 873	5,276	- 1,816	7,199	- 3,739
Catered Food	7,610	440	9,246	- 1,196	12,569	- 4,519
Department Stores	7,764	- 424	9,379	- 2,039	12,567	- 5,227
Apparel	3,137	2,383	3,801	1,719	5,121	399
Bulky Goods Stores	4,406	3,344	18,072	- 322	25,319	- 7,569
Other Non-Food Retail	5,135	4,765	6,272	3,628	8,557	1,343
Selected Personal Services	2,345	2,025	2,987	1,383	4,284	86
Total Retailing	**53,952**	**14,438**	**66,257**	**2,133**	**90,931**	**- 22,541**

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

Note: red colour indicates undersupply or unmet demand, blue indicates oversupply

This Strategy does not recommend the provision of 22,500sqm of retail floorspace within any one centre or a single new centre. Rather new floorspace and associated tenants should be directed across centres, with priority given to Manning Street, Tuncurry given its need to provide a greater range of goods to residents in Tuncurry. Manning Street, Tuncurry would also benefit from a new (or extended) anchor store to enhance its economic viability and support its growth into a Town Centre for Tuncurry over the study period.

The potential for a small village within the proposed urban release area (North Tuncurry Crown Land Site) has also been highlighted should a major mixed use development be permitted and developed on the site. A small village in this location would assist in providing sustainable living and shopping options. A new centre on the North Tuncurry Crown Land Site should however, be subservient in scale and role to the existing Manning Street, Tuncurry Centre.

Consistent with emerging trends in the New Economy, Forster - Tuncurry will experience a significant growth in demand for commercial floorspace over the study period. As shown in Table 3 below, it is estimated that this growth will translate into demand for an additional 19,500sqm of commercial floorspace by 2031. We have applied an FSR of 1:1 consistent with the recommendations of the Urban Design and Density Review 2008 to convert commercial floorspace into demand for land area (as shown in red in the far right hand column).

Table 3 - Forecast Change in Demand for Commercial Floorspace by Category 2006 – 2031 (sqm)

Commercial	Yield*	2006	2016	2031	Additional Floorspace 2031	Additional Land FSR 1:1
Financial & Insurance Services	30	4,260	4,944	6,181	1,921	1,921
Rental, Hiring & Real Estate	40	7,240	8,402	10,505	3,265	3,265
Professional, Scientific, Technical	40	9,280	10,770	13,465	4,185	4,185
Administrative & Support	30	3,360	3,899	4,875	1,515	1,515
Public Administration & Safety	50	9,000	22,050	27,568	8,568	8,568
Total		**43,140**	**50,066**	**62,594**	**19,454**	**19,454**

Source: Hill PDA, TDC 2006

*Sqm / Person

Note: red colour indicates undersupply or unmet demand

The main commercial category of growth will be public administration and safety. This industry relates to a range of personal and business services (i.e. solicitors, financial consultants etc). This industry is experiencing rapid growth across NSW with changes in how we work and live. This use is well suited to town centres such as Tuncurry that are centrally located and accessible to the community as part of a wider household shopping trip.

The second largest commercial category of growth is forecast to be professional, scientific and technical services. The growth of this industry is a result of global trends as well as aspirations for Forster - Tuncurry to become a regional focus for innovation, research and sustainability. The majority of these jobs should be located within the Study Area's centres such as Tuncurry to reinforce their commercial roles however it may be prudent to allow a component of this floorspace to form a cluster with the TAFE. This cluster must not however adversely affect the economic function of the Manning Street, Tuncurry centre.

Another sizeable growth industry will be rental, hiring and real estate services. The growth of this industry corresponds with the tourist industry as well as the development industry. Both of which are forecasted to grow over the study period. A minor component of this commercial floorspace may be required as ancillary space to transport and distribution facilities located within industrial lands.

Based on our employment projections, we estimate Forster - Tuncurry will require an additional 17,900sqm of industrial floorspace over the study period. At an FSR of 0.5:1 this translates into demand for approximately 4ha of additional industrial land over the study period. At a lower FSR of 0.35:1, this site area required increases to 5ha.

Forster - Tuncurry currently has 54.09ha of zoned industrial land of which approximately 15ha is vacant[10]. Tuncurry Industrial Area currently provides over 12ha of this vacant land. Accordingly, in principle the additional industrial site area (4 - 5ha) required over the study period could be accommodated within existing industrial zones.

Notwithstanding this however, the predominant portion of vacant land is within single private ownership (over 11ha). The development of the majority of existing vacant industrial lands within the Study Area (for industrial purposes) is therefore contingent on the private market and environmental suitability of the sites.

Should the large, single existing industrial site located in Tuncurry Industrial Area, not be delivered for industrial purposes, additional land (approximately 1 - 2ha) will need to be provided over the study period to meet demand. This however, does not allow for any buffer, should additional demand for industrial floorspace be generated, or allow for an oversupply of industrial land to maintain affordable property prices.

We therefore highlight the primary importance of ensuring that all existing vacant industrial land in Tuncurry Industrial Area is preserved through the application of an Industrial Zone and made available for development. Should all existing vacant land zoned industrial be made available over the study period, there will be sufficient land within Forster – Tuncurry to meet forecast demand and provide a buffer of land for any additional growth.

Should existing vacant industrial zoned land not be made available by private owners over the study period for development, it will be necessary for Council to make alternative land available to meet demand in the medium to long term (i.e. 2016 - 2031). Examples of additional sites that could help to meet this demand include land within the Sweet Pea Road Industrial Area and within and surrounding the existing Council Waste Management Site.

Table 4 below shows by industry category the forecast demand for industrial floorspace at reference points over the study period. Based on estimated existing supply, the net additional floorspace and land has been calculated and shown in red below.

[10] Vacant land excludes Sweet Pea Road

Table 4 - Forecast Change in Demand for Industrial Floorspace and Land by Category 2006 – 2031 (sqm)

Land Use Category	Yield*	2,006	2,016	2,031	Additional Floorspace 2031	Additional Land FSR 0.5:1	Additional Land FSR 0.35:1
Manufacturing	100	29,700	29,700	29,700	-	-	-
Electricity, Gas, Water & Waste	50	7,200	8,356	10,447	3,247	6,494	9,277
Construction	50	20,800	22,976	26,675	5,875	11,749	16,785
Transport, Postal and Warehousing	120	17,400	20,193	25,246	7,846	15,693	22,418
Information Media & Telecommunications	50	2,050	2,379	2,974	924	1,849	2,641
Total		**77,150**	**83,605**	**95,042**	**17,892**	**35,785**	**51,121**

Source: Hill PDA, TDC 2006
*Sqm / Person
Note red colour indicates undersupply or unmet demand

A range of employment generating uses within Forster - Tuncurry do not fall within the retail, commercial or industrial categories. We have therefore grouped these uses together under the term 'Special Uses'. The nature of these uses and their space requirements vary significantly however, across each category.

Special Uses relate to educational institutions (i.e. primary and secondary schools, the TAFE); hospitals; medical centres; community centres; halls and convention spaces. Regrettably, a detailed floorspace survey of existing land occupied by Special Uses in Forster -Tuncurry was not part of the Strategy's brief. Given the important role these uses play in generating employment and their significant demand for land however, we have estimated the growth in demand for floorspace and site area based on forecast job growth and anticipated floorspace yield by employee.

To assist in planning for this land over the study period, we recommend a survey is undertaken of existing land occupied by Special Uses. This will help to identify if there is an existing under / over supply and how this will affect the net growth in land required.

By 2031 it is estimated that Forster - Tuncurry will require an additional 51,000sqm of floorspace relating to these uses. As Special Uses generally have a lower density of development, we have applied an FSR of 0.5:1 to estimate demand for an additional 102,000sqm of site area (or 10ha) by 2031 to accommodate these uses.

Table 5 - Forecast Change in Demand for Special Uses by Category 2006 – 2031 (sqm)

Special Uses	Yield*	2006	2016	2031	Additional Floorspace 2031	Land FSR 0.5:1
Education and Training	80	34,960	40,573	50,725	15,765	31,530
Health Care & Social Assistance	50	44,250	51,354	64,204	19,954	39,909
Arts and Recreation Services	100	12,400	16,186	24,137	11,737	23,474
Other Services	30	8,070	9,366	11,709	3,639	7,278
		99,680	**117,478**	**150,775**	**51,095**	**102,191**

Source: Hill PDA, TDC 2006
*Sqm / Person
Note red colour indicates undersupply or unmet demand

Combining the forecasts together for all employment generating uses within the Study Area, Table 6 provides a summary of additional floorspace and site area required over the study period.

The first column (Existing Floorspace 2006) shows existing estimated supply, the second shows the forecast growth in demand for floorspace across these land uses by 2016 and 2031. The 'Net Floorspace Increase' column shows the difference between supply in 2006 and forecast floorspace demand in 2031.

The last three columns convert the estimated demand for floorspace into site area using an applicable FSR. As a result we estimate that there will be demand for an additional 17.9ha of employment generating floorspace over the study period.

The largest portion of this demand will relate to special uses such as education, health, community services and recreation. The substantial growth forecast in these industries is a direct result of the significant anticipated growth in the population and the high proportion of the population over the age of 65 years.

These uses generally develop at low densities and seek to provide a high proportion of onsite space as amenity space or landscaping. For these reasons it is expected that many of the existing special uses sites (particularly those occupied by lower density medical or community uses) could be rationalised so that they facilitate a greater density of development and therefore help to absorb some of the estimated future floorspace demand.

Whilst health and community related uses should be encouraged within centres to add to their vitality and range of services on offer, another important distinction is that they do not need to strictly locate within employment lands. Special uses in the category defined above, are generally compatible in other zones such as residential. These zones provide greater opportunity to absorb some of the additional demand.

Table 6 - Summary of Forecast Increase in Demand for Employment Generating Floorspace & Site Area

	Existing Floorspace 2008 (sqm)	Floorspace Required 2016 (sqm)	Floorspace Required 2031 (sqm)	Net Floorspace Increase Required (sqm)	FSR 1:1 (sqm)	FSR 0.5:1 (sqm)	Total Site Area (ha)
Retail	68,750	68,750**	90,931	22,181	22,181		2.22
Commercial	43,140	50,066	62,594	19,454	19,454		1.95
Industrial	77,150	83,605	95,042	17,892		35,785	3.58
Special Uses	99,680*	117,478	150,775	51,095		102,191	10.22
	288,720	**319,899**	**399,342**	**110,622**			**179,611 (17.9ha)**

Source: Hill PDA & Council Land Use Surveys 2008, TDC Employment Estimates 2006
Blue colour shows net increase in demand
* Note: Existing floorspace based on land use surveys with the exception of Special Uses category which was calculated using employment density yields
** Note: Supply will still exceed overall retail demand generated by 2016

1.6 Recommended Hierarchy of Centres & Employment Lands, Conditions and Planning Controls

Whilst the combined Forster-Tuncurry Study Area has been defined as a Major Town within the Mid North Coast Region, the Study Area comprises of a number of smaller centres and employment precincts. In accordance with the Strategy brief, the role and function of these employment precincts, both at present and in the future, have been assessed and defined using the terminology applied by the Mid-North Coast Regional Strategy.

In order to meet the growth in demand for land described above, Hill PDA has identified appropriate existing employment precincts and centres for growth and consolidation. Precincts for future employment generating development and the potential role of these precincts within the Employment Land / Centre Hierarchy have also been identified. The staging of these recommendations has been provided as follows:

- Short Term – from 2008 to 2016

- Medium Term – from 2016 to 2021
- Long Term - from 2021 to 2031

These details are summarised in the table below and depicted in the accompanying plan.

Table 7 - Summary of Proposed Employment Land / Centre Hierarchy, Visions and Controls

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM HEIGHT	VISION	STAGING
Forster – Tuncurry	Major Town	Various	Various	A major centre that meets a broad range of retail, business and community needs for the Forster – Tuncurry community and the wider Region.	Short Term
Breese Parade	Town Centre	B3 Commercial Core	3:1 Max H: 20m - 30m	A range of employment - generating opportunities, retail and civic services to meet the needs of local residents. A mix of employment generating uses that maximise the sites' merits with respect to water views and road access. Employment lands that support the role and function of the Breese Parade Town Centre.	Short Term
	Existing Bulky Goods in Breese Parade	B5 Business Development	2.5:1 Max H: 20m		Short Term
	Pipers Creek Site	TBD	TBD		Medium term
	Existing Bulky Goods on Pipers Creek Site	B5 Business Development			Short Term
Manning Street, Tuncurry	Town Centre	B2 Local Centre	2.5:1 with minimum 1:1 retail / commercial & bonus 3.5:1 for commercial only Max H: 20m - 30m	Centre grows from existing role as a Village Centre into a Town Centre for Tuncurry. The centre also becomes the main commercial centre for Forster - Tuncurry that provides an attractive working environment. A retail centre that meets the grocery service and wider retail needs of the Tuncurry community.	Short Term
		B4 Mixed Use	2:1 Max H: 12 -17m		Short Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM HEIGHT	VISION	STAGING
Wharf Street, Forster	Village	B2 Local Centre B4 Mixed Use	2:1 – 3:1 Max H: 13m - 33m 2:1 Max H: 13 -33m	An attractive centre with a range of boutique retailers, leisure and convenience services for local residents and visitors. A centre that capitalises on its waterfront location and associated uses.	Short Term
Fairways	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
Forster Keys	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
South Forster	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A new centre that meets the convenience needs of local residents minimising the need to travel by car.	Medium Term
North Tuncurry Crown Land	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m Subject to Master Plan	A new centre to meet the convenience needs of future residents of the North Tuncurry Crown Land site. The centre will be of a scale that ensures no conflict with the role of the Manning Street, Tuncurry Town Centre or its economic viability.	Medium Term
North Tuncurry Crown Land	TBD	TBD	TBD but Indicative 1:1 Max H: 8.5m	Additional employment generating uses to be determined subject to master plan and environmental assessment.	Medium Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM HEIGHT	VISION	STAGING
Lake Street, Forster	Neighbourhood	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
Forster Industrial Area	Primary Industrial Lands, of Strategic Importance and Part of the Breese Parade Centre	IN2 Light Industrial	1:1 Max H: 10m	A mix of employment generating opportunities that support the function of the town centre and do not conflict with sensitive surrounding uses. A range of businesses and services that meet the needs of local residents, trades and businesses.	Short Term
Tuncurry Industrial Area	Primary Industrial Lands of Strategic Importance	IN2 Light Industrial	1:1 Max H: 10m	Primary industrial lands for Forster - Tuncurry. Industrial lands that provide a mix of site sizes that facilitate clusters of industry and good access to Greater Taree and the Pacific Highway.	Short Term
Sweet Pea Road	Secondary Industrial Lands of Local Importance	IN2 Light Industrial	TBD but indicative 1:1 Max H: 10m	Industrial lands that are buffered from surrounding residential uses and that provide local employment / business location options for light industries and manufacturers.	Medium Term
Tuncurry Working Waterfront	Primary Working Waterfront Lands	IN4 Working Waterfront	1:1 Max H: 8.5m	A mix of employment generating uses and facilities related to waterfront industrial and maritime activities that require direct access to the water. An employment generating zone that will not adversely affect the visual character of the foreshore and will support the viability and function of the	Short Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM HEIGHT	VISION	STAGING
				Manning Street, Tuncurry Centre.	
Forster Working Waterfront	Primary Working Waterfront Lands	IN4 Working Waterfront	1:1 Max H: 8.5m	A mix of employment generating uses and facilities related to waterfront industrial and maritime activities that require direct access to the water. An employment generating zone that will not adversely affect the visual character of the foreshore and will support the viability and function of the Wharf Street, Forster Centre.	Short Term
Breckenridge Channel (excluding Oyster Farm)	Natural Waterways with recreational boating and tourism facilities	W1 Natural Waterways	0.5:1 Max H: 8.5m	A zone of significant natural value that facilitates recreational boating, tourist activity and outdoor recreational activities without adversely affecting the environmental quality of the waterways.	Short Tem
Medical Precinct	Specialised Centre	In accordance with surrounding uses	1:1 Max H: 8.5m	A specialised centre focused around the existing hospital that meets the health and community needs of the local population. A centre of excellence for sustainable ageing that does not conflict with surrounding uses.	Short Term
North Tuncurry Waste Management Centre	TBD	IN2 Light Industrial	TBD but Indicative 1:1 Max H: 8.5m	To be determined subject to master plan and environmental assessment.	Long Term

TBD: To be determined subject to master plan and environmental assessment

* Subject to development and retail impact assessment

Figure 1 - Plan of Proposed Future Centre and Employment Land Hierarchy

Source: Hill PDA / Red Square

1.7 Recommendation – A Sustainable Point of Difference

A key recommendation of this Strategy is to create a point of difference for the Forster – Tuncurry Study Area. We recommend an exciting brand for Forster - Tuncurry is created that distinguishes it from other coastal centres and tourist locations. The objective of the brand or point of difference would be to raise renewed interest in Forster - Tuncurry to attract new tourists, draw former visitors back, attract new businesses and encourage the growth of existing ones whilst creating a more balanced community with respect to age and family type.

During the Strategy's consultation process, a high level of interest and excitement was raised in relation to the concept of sustainability. The importance of economic, social and environmental sustainability is an increasingly recognised global issue. There is growing awareness that we need to amend the way we live our lives today in order to preserve the quality of our children's lives in the future. Whilst the importance of this issue is becoming apparent, there is great uncertainty as to how we achieve this change without compromising our quality of living.

As part of the Strategy we recommend that Forster - Tuncurry develops a bold vision to become a centre of excellence for sustainability. The centre would become a focal point for research and innovation that showcases best practice methods to achieve sustainable living alternatives without hindering business development or the quality of residents' lifestyles.

The concept of sustainability has a broad range of meanings and methods of interpretation. The breadth of the concept could work to Forster - Tuncurry's benefit however as it creates an overarching vision for the Study Area that draws together a range of industry, community and lifestyle components within one positive framework.

Examples of some of the industries which could benefit from Forster - Tuncurry's Sustainability Point of Difference include:

- Tourism – through the preservation and enhancement of the natural environment and tours, eco tours as well as eco friendly accommodation options that make their visitors feel good about being on holiday;
- Agriculture and Aquaculture – through the promotion of sustainable and healthy eating options and the benefits of local produce;
- Health and Lifestyle – through the promotion of quality living opportunities in Forster - Tuncurry for all age groups. This concept could be supported by the range of conventional and alternative health and employment options provided within the Study Area, together with the benefits of the natural environment, to create healthy lifestyle options for families and retirees away from the 'rat race';
- The Natural Environment – by promoting Great Lakes LGA's success with repairing ecosystems (such as Wallis Lake) and preserving and enhancing the natural environment;
- The Built Environment – through the creation of environmentally friendly buildings, centres and working environments that minimise the need to travel by private vehicle, minimise energy usage and create attractive and enjoyable places to be;

- Industry – through the attraction and clustering of light industries relating to sustainable living research and innovation in appropriate locations such as the Forster Industrial Area, the Sweet Pea Road Industrial Area or potential employment sites such as the North Tuncurry Waste Management Centre Site identified by this Strategy; and
- Education – through the growth of post secondary school institutions that educate the local community from youths to elders about the concept of science and technology and the growing role it will play in the future economy.

Of critical importance to the success of this vision will be the community's commitment to its implementation and development. Community in this respect relates to all stakeholders in Forster - Tuncurry including residents, businesses, landlords, the Council, State Government Organisations and future generations. Also of great importance will be the need to sell the message of what is happening in Forster - Tuncurry and why it would interest others to move to the area to live, work or learn more about what is happening.

The theme of sustainability should also be one that attracts rather than hinders business. It should be one that gives cost savings to businesses through greater efficiencies and improves staff working environments through design. Sustainability is an industry within itself and its implementation as a vision will attract businesses to cluster with like businesses in the Study Area.

The overarching role that the brand or theme of 'Sustainability' could play as a point of difference for Forster - Tuncurry has been discussed in relation to the thirteen mechanisms recommended by this Strategy to attract businesses to the area.

1.8 Recommendations - Mechanisms to Achieve Outcomes

A key objective of the Strategy has been to identify and suggest mechanisms that could be used to achieve the visions and objectives for Forster – Tuncurry identified in the Strategy. These mechanisms should aim to attract a diverse range of employment generating businesses to the Study Area to meet the needs of the population as it grows. Furthermore, as forecasting job growth does not necessarily translate directly into reality, the implementation of the mechanisms discussed below should be encouraged to ensure that the correct economic environment (and other factors) are created to realise Forster-Tuncurry's potential as a Major Town Centre.

The strategy has suggested thirteen potential mechanisms to facilitate an environment in Forster - Tuncurry that will attract, support and nurture desirable employment growth. The Strategy has also identified appropriate organisations to lead on the implementation of the mechanisms along with key partners and recommended timeframes for commencement.

A summary of the thirteen mechanisms and their objectives are provided below.

Mechanism 1 Develop a Point of Difference: *create a point of difference for Forster - Tuncurry that distinguishes it from other coastal centres and attracts desirable businesses.*

Outcome: *the creation of a unique selling point for Forster - Tuncurry that attracts desirable business clusters.*

Mechanism 2 Sustainable Health and Living: *balance the concept of sustainability so that it includes lifestyle and healthy living options in addition to the environment and economy.*

Outcome: *a healthy and happy community that attracts businesses as a result of the health of the local labour force and quality of the living and working environment.*

Mechanism 3 Broaden the Tourist Industry: *extend the tourist season so that it can attract a broader range of visitors and spread the economic flow on benefits to associated industries over a greater period each year.*

Outcome: *an extended tourist season with a range of activities and attractions that encourages new visitors and a greater number of visitors and repeat visitors through the course of the year.*

Mechanism 4 Access: *enhance the perception of unconstrained access within Forster - Tuncurry and to surrounding centres.*

Outcome: *suitable local and regional access that minimises business costs and maximises business opportunity.*

Mechanism 5 Education and Training: *enhance opportunities for younger residents to continue living in Forster-Tuncurry whilst progressing their education and expanding their skill set. Promote life-long learning opportunities and re-skilling for existing residents.*

Outcome: *Forster - Tuncurry becomes a focal point in the Great Lakes LGA and the Mid North Coast for education and training in relation to environmental, economic and social sustainability with future employment prospects.*

Mechanism 6 Government Support for Forster - Tuncurry: *promote government support for services in Forster - Tuncurry in light of its designation as a place of significant urban growth.*

Outcome: *Forster - Tuncurry maintains its "Market Share" of state and local government services with respect to its population share.*

Mechanism 7 Subsidised Workspace: *provide a diverse range of employment generating floorspace in Forster - Tuncurry including subsidised or sub market rent.*

Outcome: *a culture of support for starter businesses that attracts new businesses and in turn leads to local business and employment growth.*

Mechanism 8 Business Precinct Plans: *support the long term economic sustainability of Forster and Tuncurry Centres.*

Outcome: *a range of healthy and sustainable retail and commercial centres that meet the needs of local residents, employees and visitors to Forster - Tuncurry.*

Mechanism 9 Fiscal Incentives: *provide fiscal incentives to attract businesses to Forster - Tuncurry or the expansion of existing businesses.*

Outcome: *a package of benefits (both fiscal & nonfiscal) that attract desirable businesses to Forster - Tuncurry.*

Mechanism 10 A Supportive Development Process: *enhance the perception of, and certainty in, the local development assessment process to encourage business confidence and reduce relocation and expansion risks / delays.*

Outcome: *enhanced joint working with businesses and greater attraction to doing business with Great Lakes Council and investing in Forster - Tuncurry.*

Mechanism 11 Make Forster - Tuncurry 'Urban Chic': *enhance the cultural and recreational appeal of Forster - Tuncurry to a range of age groups.*

Outcome: a *greater number of tourists with a broader range of activities as well as reinvigorated interest in living and working in the area by a range of age groups.*

Mechanism 12 Tell the World: *prepare and implement a tailored marketing and advertising campaign for Forster - Tuncurry*.

Outcome: *increased awareness across NSW of the benefits of not only holidaying in Forster - Tuncurry but also living, working and operating a successful business.*

Mechanism 13 Monitor and Review: *monitor and review the mechanisms, forecasts and outcomes of the Employment Lands Implementation Strategy and amend where appropriate*.

Outcome: *an effective and up to date Implementation Strategy that anticipates and plans for desirable change rather than reacting to it.*

2. INTRODUCTION

In 2006 Great Lakes Council commissioned the Great Lakes Employment Land Strategy (draft GLELS 2006). The draft GLELS 2006 concluded that Great Lakes LGA would experience a challenge in the future as a result of the forecast growth and ageing of its population. The scale of population growth was estimated to increase demand for between 2,691 and 3,068 jobs across the LGA by 2021 as well as a range of retail, industrial and commercial services. Population growth would in turn fuel demand for additional employment lands and the extension of centres. The Great Lakes Council (hereafter referred to as the Council) would need to plan for the generation of these jobs and determine a suitable rate of supply of land over the next 15 years.

Council recognises this growth in demand for employment generating opportunities across the LGA. It also recognises the need to plan more specifically as to where, how and when this land should be provided in order to protect and enhance the local economy and natural environment. Accordingly Council commissioned an 'Employment Lands Implementation Strategy' to investigate the practicalities of providing suitable employment generating space and facilitating employment growth, commensurate with demand.

In order to facilitate a more detailed look at the issue, and to complement the overarching work undertaken by the draft GLELS 2006, Council has chosen to initially focus on the key employment generating and economic centres of the LGA. Forster - Tuncurry is the largest centre in Great Lakes LGA generating over 64% of all employment. Forster - Tuncurry also accommodates 56% of Great Lake's residents. As the LGAs' only Major Town Centre, Forster - Tuncurry was nominated as the first locality to be addressed in greater detail. Forster - Tuncurry is therefore the focus of this report and defined as the Study Area.

2.1 Study Brief & Objectives

Hill PDA was commissioned by Great Lakes Council to prepare a retail, commercial and industrial Land Implementation Strategy for Forster - Tuncurry. The Strategy was commissioned to review and build on the draft GLELS 2006 and incorporate the principles and concepts identified in the Strategic Plan for the Economic Development of the Great Lakes Area (2003) in addition to the Urban Density and Design Review 2008.

The Strategy will provide Council with a clear framework on which to plan the provision of optimal areas for retail, commercial, bulky goods and industrial activities so as to satisfy demand over the next 25 years within Forster - Tuncurry. It accords with the strategies identified by the Mid-North Coast Regional Strategy 2008 and Councils vision to be:

"a leader in the provision of infrastructure and services which sustain and enhance the natural environment and achieve a quality lifestyle for residents and visitors".

The Implementation Strategy also seeks to provide greater clarity and detail with respect to:

- the current supply and availability of employment land;
- existing and future demand for employment land up to 2031; and
- how much land should be provided for employment purposes, what type, when and where.

The Strategy also provides recommendations regarding:

- what an appropriate hierarchy of activity centres could be and how the hierarchy could guide business;
- appropriate controls and conditions that should be applied to achieve desired outcomes;
- potential impacts of implementing these recommendations;
- potential impacts of implementing recommendations to current employment precincts; and
- what mechanisms and strategies Council could use to achieve the desired outcomes.

The study has a 25 year timeframe to accord with the Mid-North Coast Regional Strategy 2008.

2.2 Report Methodology

The Strategy has adopted a broad range of research and consultation methods in order to provide detailed information to Council and to inform the report's recommendations. The Strategy's methodology has included:

- a detailed floorspace survey of commercial centres;
- a survey of industrial lands;
- a survey of existing businesses;
- a review of existing Council studies and policies;
- a review of other relevant studies, government policies and strategies;
- site visits;
- a business workshop;
- workshops with Council's Economic Development Advisory Committee;
- discussions with Council Officers;
- discussions with local stakeholders and landowners; and
- discussions with relevant State Government representatives including the Department of Planning and Department of State and Regional Development.

2.3 Report Structure

For ease of communication and review, the report has been structured into four key components as follows:

Part A – Introduction: this section provides an introduction to the study and its objectives;

Part B – Forster - Tuncurry in Context: this section reviews and explores the existing strategic, social and economic climate of Forster - Tuncurry. It reviews the characteristics of the existing population and labour force as well as the lifestyle and economic trends affecting them. This context is discussed in light of the existing relevant planning considerations, strategies and policies and the quantum and type of retail, industrial and commercial floorspace provided in Forster - Tuncurry;

Part C – Forecasted Changes in Forster - Tuncurry: this section builds on the information provided in Part B by analysing the forecasted growth of population and employment in the LGA and Study Area in addition to the effect this will have on demand for retail and other employment generating floorspace. The amount of retail floorspace required within centres across the Study Area is estimated along with the growth in demand for commercial and industrial floorspace; and

Part D – Implementation Strategy: this section provides a summary of the key issues identified by the study's research and translates them into visions and recommendations for the Study Area's centres and employment lands. It provides recommendations as to an appropriate retail hierarchy for Forster - Tuncurry's centres and employment lands over the study period. The recommendations are communicated as planning strategies and zones for each centre and employment precinct. Detailed recommendations are also provided in relation to mechanisms to attract business to Forster - Tuncurry. To conclude a comprehensive summary is provided of recommendations and mechanisms and an appropriate plan for implementation.

2.4 Study Background

In 2002 the Council adopted the Strategic Plan for the Economic Development of the Great Lakes Area (2003). The plan sought to strengthen the local economic base and reduce the high rate of unemployment. Since the Strategy's adoption, unemployment in the LGA has decreased however it remains noticeably higher than the mean for the Mid North Coast Region.

Further to reductions in the rate of unemployment, the 2002 Strategy recommended that a comprehensive retail strategy be developed for Forster - Tuncurry to ensure that a retail centres hierarchy is established that can meet the expanding needs of the local and visiting population. A key objective that was identified was to enable the local capture of retail spending, avoiding leakage to centres outside of the LGA.

In 2003 Council adopted the Forster - Tuncurry Conservation and Development Strategy. It was found that more work was needed however to determine whether additional land was required for industrial purposes. The 2003 Strategy also recommended that a retail centres strategy be produced.

In 2005 Council engaged consultants to prepare an Employment Land Strategy for the Great Lakes LGA. It involved a review of the supply and demand for employment land within Great Lakes and an assessment of the need and potential for development of further land in the area to generate future employment generating activities. The draft GLELS 2006 has not been adopted by Council.

Recently Forster - Tuncurry has seen a significant expansion in retail with the completion of the Stockland Shopping Centre. Further to this, Council has received a considerable number of enquiries from developers / major retailers in relation to the rezoning of employment and non urban lands for retail.

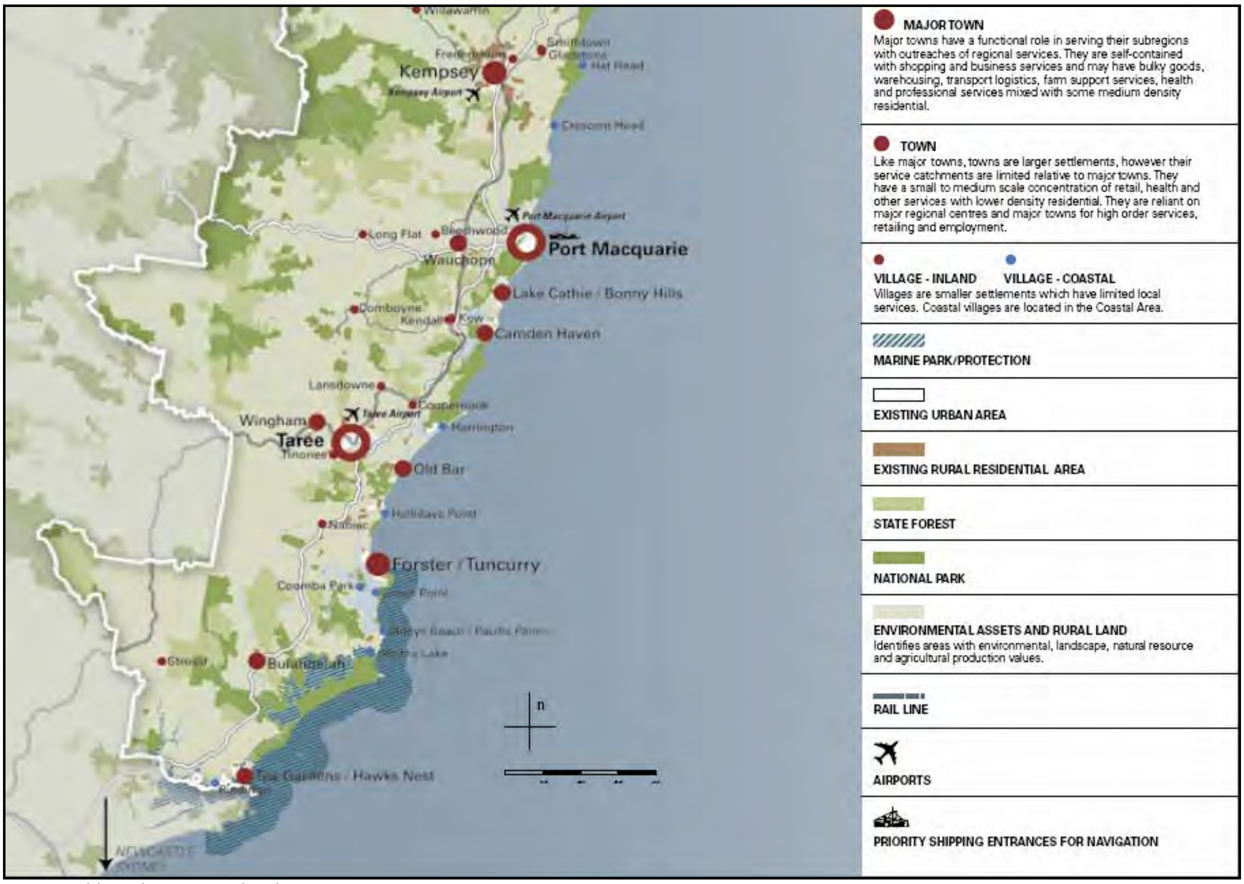
A more detailed Implementation Strategy has therefore been identified as necessary specifically for Forster - Tuncurry to guide Council in the provision of adequate land for retail, commercial, bulky goods and industrial activities in Forster - Tuncurry over the next 25 years.

2.5 Study Area Description

Forster - Tuncurry is located on the East Coast of NSW at the entrance to Wallis Lake. Tuncurry is situated on the northern side of the entrance to the lake and Forster to the south. The area is located within the Great Lakes LGA which sits within the Mid North Coast Region of NSW.

The Forster - Tuncurry Major Town Centre along with the Great Lakes LGA are shown in the figure below as part of the wider Mid North Coast Region.

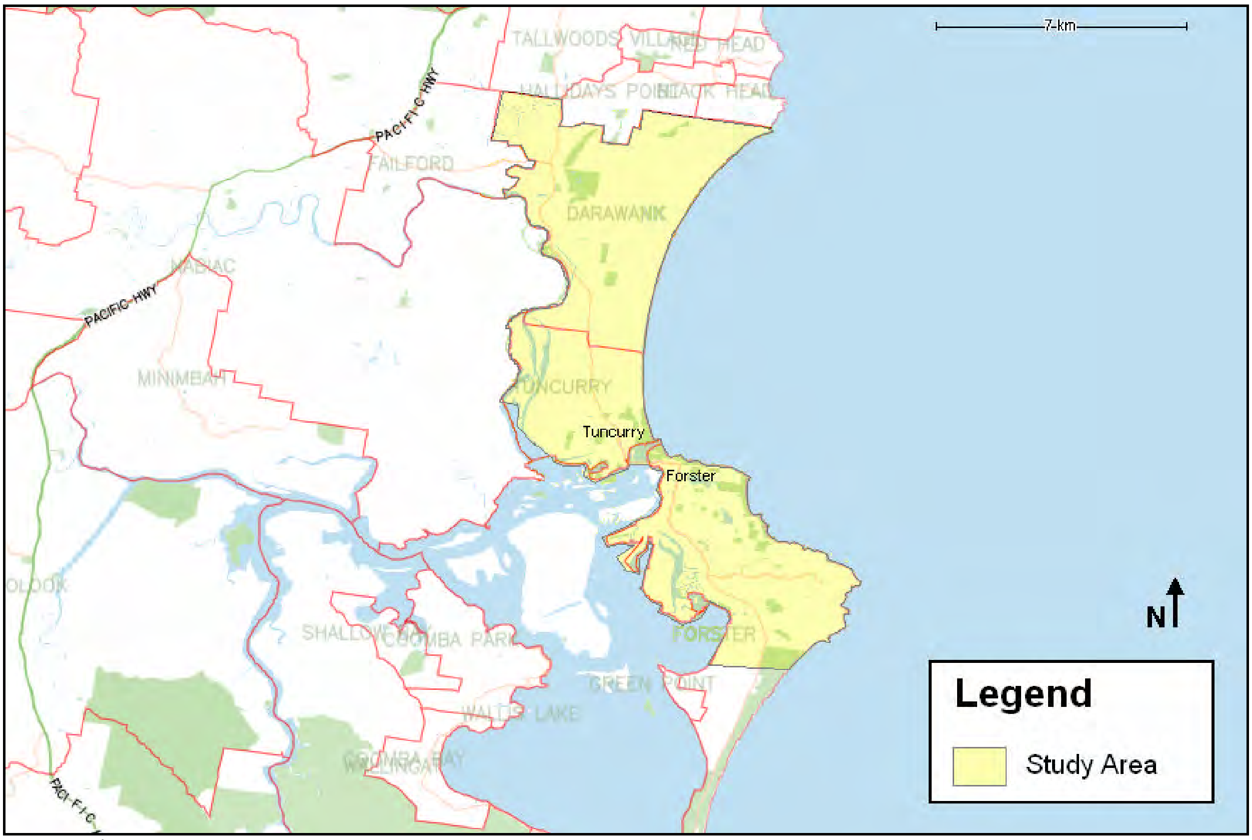
Figure 2 - Forster - Tuncurry in Context of the Mid North Coast Region



Source: Mid-North Coast Regional Strategy, DoP

The Study Area assessed by the Implementation Strategy predominantly included the suburbs of Forster and Tuncurry but also took into consideration land located within the suburb of Darawank to the north. The general Study Area is shown shaded in yellow in the below figure.

Figure 3 - Forster – Tuncurry Study Area



Source: Red Square

Part B - Forster-Tuncurry in Context

3. DEMOGRAPHIC SNAPSHOT

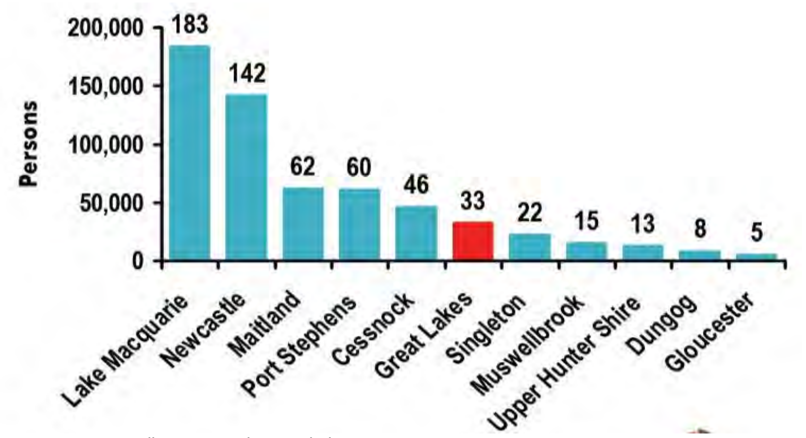
The following section reviews the existing demographic profile of Forster - Tuncurry in relation to the wider Great Lakes LGA, NSW and Non Metropolitan NSW. It highlights key social characteristics and trends that influence the labour force and that are relevant to employment demands. Each of the factors discussed below have in turn been considered in the preparation of this Strategy.

3.1 Population Growth

The Mid North Coast Region has experienced significant population growth over the past 25 years. The Mid-North Coast Regional Strategy identifies that population growth has been particularly strong in Forster - Tuncurry. It also anticipates a further 27% population growth (90,000 people) in the Region between 2006 and 2031 to a population of 424,000.

As of the 2006 Census, Forster - Tuncurry had a population of 18,372 people. Despite strong growth over the past 25 years and recent development activity, between 2001 and 2006 the permanent resident population only increased by 372 people (or 0.2%). Notwithstanding the small net increase over the census period, the Study Area accommodates the vast majority (56%) of the Great Lake's resident population[11].

Figure 4 - Great Lakes Population (000's) compared to the Hunter Region as of 2006



Source: Hunter Valley Research Foundation 2008

For the purposes of our assessment, it has been agreed with Council that a growth rate of 1.5% per annum will be adopted for Forster - Tuncurry over the study period. This assumption includes the release of major sites for urban development including Crown Land at North Tuncurry during the study period. A 1.5% growth rate is strong and exceeds the average anticipated growth rate for the Mid North Coast Region of 1%.[12]

[11] 32,764 as of 2006 Census

[12] draft Mid-North Coast Regional Strategy, DoP

A 1.5% growth rate would result in a population increase from 18,372 in 2006 to 26,650 by 2031. This growth represents a net increase of approximately 8,300 people in the Study Area or 9% of all growth forecasted for the Mid North Coast Region.

Population growth has a direct relationship with demand for employment as well as local services. Accordingly this significant growth will have an important influence on demand for employment lands and the type of employment lands required. An under representation of residents within the 18 – 34 and 35 – 49 age groups may also hinder the range of employment options and businesses attracted to locate within Forster - Tuncurry owing to the reduced availability of residents in the middle age groups of the labour force.

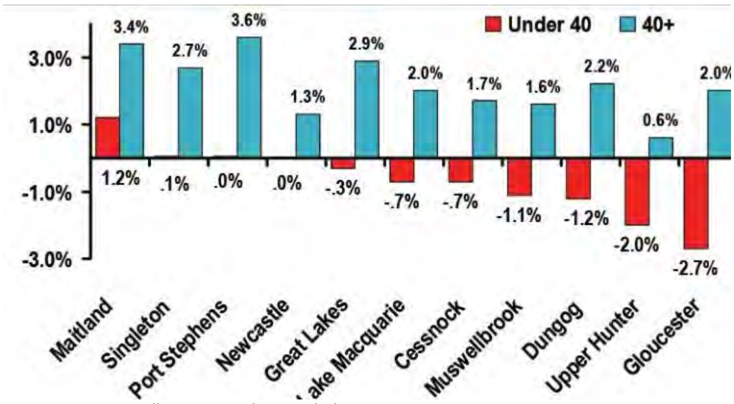
3.2 An Ageing Population

Whilst the decline in fertility rates and the growing proportion of persons over the age of 65 years is a consistent trend across NSW, the LGA of Great Lakes currently has proportionally twice as many residents (32.5%) over the age of 65 years than NSW (13.8%). Compared to the Great Lakes LGA, Forster - Tuncurry in fact has a higher proportion of residents (27.8%) with this age group.

The graph below breaks down the resident populations of various LGAs in the Hunter Region into two categories - over and under 40 years – and shows their respective growth rates between 1996 and 2006.

Whilst Great Lakes does not show the greatest rate of decline in persons aged under 40 years or the greatest rate of increase for people over 40, the relative starting point (existing high proportion of aged persons) means that it will have one of the oldest populations in the Region and in fact NSW proportionally by 2031.

Figure 5 - Population Growth Rates Over / Under 40 years 1996 - 2006



Source: Hunter Valley Research Foundation 2008

The NSW Statistical Local Area (SLA) Population Projections 2001 – 2031, prepared by the Transport Data Centre (TDC) in 2005 affirms this position. The projections anticipate that of all SLA's in NSW, Great Lakes is forecasted to experience the highest median age (59 years) by 2031. Great Lakes is followed by Gwydir (58 years); Clarence Valley (58 years); Eurobodalla, Mid Western Regional NSW and Nambucca each with a median age of 57 years.

Approaching the matter of age from a different angle, the proportion of persons residing within Great Lakes by 2031 over the age of 65 years is anticipated to be 40.3%. This proportion represents the highest rate of all SLAs in

NSW. It significantly exceeds Tweed that is projected to have 38.2% of its population over 65 years by 2031, Gwydir (38%) and Nambucca (37.8%).

The ageing of a larger portion of the population, relative to younger age groups, will have a significant impact on the appropriate type of employment to be targeted for Forster - Tuncurry. This is because the age of the population and their lifestyle choices has an influence on not only work capability but also the type of services and goods required and therefore the type of employment generated. A higher proportion of persons over the age of 65 years will also influence the ratio of the resident workforce compared to population. These issues and implications are discussed further below.

3.3 General Characteristics

Reviewing general ABS 2006 Census Data for the Forster - Tuncurry Urban Locality in comparison to NSW and Non Metro NSW in the tables below, identifies the following characteristics of Forster - Tuncurry's resident population:

- a lower household occupancy rate (2.1 compared to the NSW average of 2.6);
- a significantly greater median age of 59 years compared to 36 – 37 years;
- a higher proportion of people born in Australia and Oceania;
- a lower proportion of family households and couples with children. A corresponding greater proportion of lone person households and couples without children;
- slightly greater levels of home ownership and lower levels of rental than NSW and Non Metro NSW;
- a higher proportion of town houses and 'other' housing types;
- a lower proportion of residents employed as managers or professionals (25%) compared to NSW (33%) and Non Metro NSW (34%). Great Lakes also has fewer people employed in manufacturing related trades such as machinery operators and drivers as well as clerical and administrative workers;
- a higher proportion of community and personal service workers, sales workers, technicians and trades persons; and
- a greater proportion of households within lower income bands compared to NSW and Non Metro NSW.

The characteristics listed above represent an older, more established community. It is indicative of the greater number of retirees or persons moving to the area after raising their children. The Study Area has a higher proportion of medium density housing in the form of townhouses yet a lower proportion of units compared to NSW. It also provides alternative forms of accommodation such as caravans given the availability of suitable sites and the need to accommodate a range of household incomes.

A range of housing options is important in Forster - Tuncurry owing to the high proportion of households in the lower household income bands. In fact 63% of households have a weekly income of less than $1000. This compares to 43% of households across NSW and 41% of households in Non Metro NSW. Further only 17% of households earn over $1000 per week compared to 20% and 22% for NSW and Non Metro NSW respectively.

The employment profile based on ABS Census data highlights the greater propensity of Forster - Tuncurry's residents to work in the retail, construction or health industry (sales workers, labourers, community and personal service workers). It also shows the limited range of job opportunities provided in manufacturing industries (machinery operators and drivers) as well as commercial businesses (professionals, clerical and administrative workers).

Table 8 - General Population Characteristics

	Forster - Tuncurry 2006	NSW 2006	Non-Metro NSW
Population and Dwellings			
Total Population	18,372	6,549,177	2,429,987
Total Dwellings	7,789	2,728,719	1,085,044
Occupied Private Dwellings	5,259	2,470,451	948,986
Occupied Private Dwellings (%)	67.5%	90.5%	87.5%
Average Household Size	*2.1*	*2.6*	*2.6*
Age Distribution			
0-14	14.5%	19.8%	19.7%
15-29	12.3%	19.8%	20.3%
30-44	13.8%	21.8%	22.3%
45-59	19.2%	19.9%	19.7%
60-74	23.3%	12.0%	11.4%
75+	17.0%	6.7%	6.5%
Total	100.0%	100.0%	100.0%
Median Age	*52*	*37*	*36*
Place of Birth			
Australia & Oceania	85.7%	71.2%	68.1%
Europe	6.0%	7.8%	8.2%
North Africa and Middle East	0.1%	1.6%	2.0%
Asia	0.6%	7.1%	8.4%
Americas	0.3%	0.5%	0.5%
Sub-Saharan Africa	0.1%	0.5%	0.6%
Other	7.2%	11.4%	12.3%
Total	100.0%	100.0%	100.0%

Source: ABS Census 2006

Table 9 - Population Characteristics: Dwelling and Household Type

	Forster – Tuncurry 2006	NSW 2006	Non-Metro NSW
Home Ownership			
Owned or Being Purchased	67.5%	66.7%	66.1%
Rented	27.5%	29.5%	30.2%
Other/Not Stated	5.0%	3.8%	3.7%
Total	100.0%	100.0%	100.0%
Household Structure			
Family Households	66%	72.1%	72.3%
Lone Person Households	31%	24.2%	23.7%
Group Households	3%	3.7%	3.9%
Total	100%	100.0%	100.0%
Family Type			
Couple family w. children	27.3%	46.2%	47.4%
Couple family w/o children	56.1%	36.0%	34.9%
One parent family	15.5%	16.1%	15.9%
Other family	1.1%	1.7%	1.8%
Total	100.0%	100.0%	100.0%
Dwelling Type			
Separate house	66%	71.4%	68.4%
Townhouse	18%	9.7%	10.5%
Flat-Unit-Apartment	13%	17.7%	20.1%
Other dwelling	3%	1.1%	0.9%
Not stated	0%	0.1%	0.1%
Total	100.0%	100.0%	100.0%

Source: ABS Census 2006

Table 10 - Population Characteristics: Employment and Income

	Forster - Tuncurry 2006	NSW 2006	Non-Metro NSW
Labour Force			
Managers	11.8%	12.8%	12.7%
Professionals	13.3%	19.9%	20.9%
Community & Personal Services Workers	10.4%	8.1%	7.9%
Clerical and Administrative Workers	11.0%	14.5%	15.0%
Sales Workers	12.1%	9.1%	9.1%
Technicians & Trade Workers	13.6%	12.8%	12.5%
Machinery Operators & Drivers	4.1%	6.1%	5.9%
Labourers & Related Workers	12.0%	9.0%	8.5%
Inadequately described or N.S.	1.4%	1.8%	1.9%
Unemployed	10.3%	5.9%	5.7%
Total	100.0%	100.0%	100.0%
Weekly Household Income			
Negative/Nil income	0.7%	14.9%	14.1%
$1-499	32.9%	21.2%	19.9%
$500-$999	30.7%	21.5%	21.3%
$1000-$1999	21.4%	19.1%	19.9%
$2000 or More	5.6%	12.0%	13.6%
Partial income stated(c)	6.1%	8.3%	8.4%
All incomes not stated(d)	4.0%	2.9%	2.8%
Total	100.0%	100.0%	100.0%
Median Weekly Household Income	*597*	*1036*	*1082*

Source: ABS Census 2006

3.4 Labour Force Participation Rate

The availability of workers has a large impact on the attractiveness of a location for new businesses. As of 2006, 6,242 of Forster - Tuncurry's 18,372 residents were in the labour force. This figure includes persons employed or seeking employment and represents a labour force participation rate of 34%. It shows a modest increase (302 persons) from the 2001 census whereby 33% of residents at that time were in the labour force.

Notwithstanding the increase over the Census period, Forster - Tuncurry's labour force participation rate is low compared to the labour force participation rate of NSW as of 2006 (47%). It is also lower than the participation rate for Great Lakes LGA of 36%. The low labour force participation rate can be explained in part by the significant proportion of the resident population who have retired in addition to the lifestyle characteristics of the Study Area that attracts residents seeking a 'Sea Change' and to move away from the workforce.

3.5 Unemployment & Underemployment

In 2006 3,042 people in the workforce (49%) were in full time employment. This represents a 1% increase in full time workers from 2001. It is still noticeably lower however than the NSW average whereby 60% of employed persons worked full time. This characteristic could be a reflection of the older community and lifestyle choices of Forster - Tuncurry residents to work part time. However it may also be representative of a more concerning social trend relating to underemployment.

Underemployment relates to a predicament where a worker has employment, yet not to the extent required. For example, they may have a causal position, part time position or a periodic contract yet seek a full time position. It is understood that this situation is experienced by residents of Forster - Tuncurry as a result of the seasonal tourist industry and the associated periodic change in demand for staff (particularly in the retail, accommodation, food and rental services) to meet the needs of visitors.

Unemployment levels have been traditionally high in Forster - Tuncurry. As of 2006 641 persons or 10.3% of the labour force was unemployed. At the same time NSW had an unemployment rate of 5.9%. The 2006 rate for Forster - Tuncurry represents however a noticeable reduction from the 2001 reported ABS figure of 706 persons or 11.9% of the labour force.

3.6 Skills and Education

With the growth of the New Economy and the Global Economy, employee education and professional skills are becoming important employee commodities. The increasing importance of education is apparent across NSW where there has been a 5% increase in the number of people with a university degree between 1996 and 2006.

For the purposes of this Strategy, the highest level of school education attained by residents of Forster - Tuncurry has been compared to the same figure for the Mid North Coast and the Sydney SD. The Sydney SD has been chosen as a high end indication of skill base given Sydney's role as a Global City.

The table below shows that Forster - Tuncurry has experienced an increase from 20% to 23% of residents attaining a year 12 level of education (or higher) since 2001. This level compares unfavourably however with the Mid North Coast Region average of 27% and the Sydney SD of 49%.

In part the lower level of educational attainment may be a result of the proportion of the population in older age brackets. Notwithstanding this however it is indicative of the skill base of the existing resident population and has implications to employment opportunities. The relationship of education to employment opportunities will be discussed in greater detail below.

Table 11 - Highest Year of School Education 2001 - 2006

Level of Education	F / T 2001	F / T 2006	Mid North Coast	Sydney SD
Year 12 or equivalent	20%	23%	27%	49%
Year 11 or equivalent	6%	7%	7%	5%
Year 10 or equivalent	35%	36%	35%	22%
Year 9 or equivalent	15%	14%	12%	6%
Year 8 or below	13%	9%	9%	6%
Did not go to school	0%	0%	0%	11%
Highest year of school not stated	9%	11%	9%	100%

Source: ABS 2001; 2006, Hill PDA

3.7 How Have Resident Jobs Changed?

The draft GLELS 2006 anticipated growth would occur in the resident workforce in the tertiary industry and that there would be an ongoing decline in primary and secondary industries over the study period (up to 2021). These trends are widely accepted and acknowledged across Australia as the economy focuses more on 'value add' and 'knowledge industries' and traditional manufacturing becomes more efficient. These trends, and their implications to Forster - Tuncurry, are discussed further in Section 6 of this Strategy.

The following outlines how the effect of these trends has come to transpire in Forster - Tuncurry in the early part of the current century. ABS Census 2001 and 2006 data has been used to track the growth and decline of the industries residents were employed in. Regrettably this comparison has been complicated by the addition / amendment of ABS industry categories between census years. Where possible the table below has matched 2006 categories with those that were used in 2001 and calculated the shift change in resident employment.

The tables below shows that between the 2001 and 2006 Census years the trends discussed above were becoming evident. There was a decline experienced in Forster - Tuncurry in residents employed in the Agriculture, Forestry and Fishing Industry. This could be a result of the greater use of primary land for housing development or be reflective of challenges experienced in the Oyster industry over that period. It may also be reflective of the greater efficiencies of these industries and therefore the reduced need for workers.

Manufacturing and mining also showed a decline. The reduction in manufacturing may be a result of constrained land, greater competition or greater efficiencies gained reducing the need for employees.

Interestingly the number of jobs in retail and wholesale trade showed a decline. There are a number of possible causes of this including constrained land for the large retail formats required by wholesale traders and the depression of the tourist industry and therefore reduced demand for retail. The most likely reason however relates to the greater number of workers travelling from surrounding LGAs (such as Greater Taree) to jobs)such as those in the retail industry) in Great Lakes.

Consistent with wider economic trends, employment growth occurred in the information and communications industry; education and training; health care and personal services; financial and insurance services and construction.

Table 12 - Change in Resident Workforce Jobs by Industry 2001 to 2006 Census Years

2001 Industry Categories	2001 Total Jobs	2006 Industry Categories	2006 Total Jobs	Change 2001 -2006
Agriculture, Forestry and Fishing	168	Agriculture, forestry & fishing	152	-10%
Mining	22	Mining	16	-27%
Manufacturing	301	Manufacturing	287	-5%
Electricity, Gas and Water Supply	50	Electricity, gas, water & waste services	89	78%
Construction	508	Construction	643	27%
Wholesale Trade	169	Wholesale trade	102	-40%
Retail Trade	1,116	Retail trade	890	-20%
Accommodation, Cafes, Restaurants	521	Accommodation & food services	650	25%
Transport and Storage	131	Transport, postal & warehousing	188	44%
Communication Services	36	Information & telecommunications	41	14%
Finance and Insurance	125	Financial & insurance services	127	2%
Property and Business Services	453	Rental, hiring & real estate services	163	
Government Administration / Defence	224	Professional, scientific & technical services	193	
		Administrative & support services	136	
		Public administration & safety	332	-42%
Education	345	Education & training	383	217%
Health and Community Services	572	Health care & social assistance	749	191%
Cultural and Recreational Services	121	Arts & recreation services	117	
Personal and Other Services	257	Other services	213	
Not stated / Non-classifiable economic units	97	Inadequately described/Not stated	129	33%
Total	**5,226**	**Total**	**5,600**	

Source: ABS Census Data, Hill PDA

4. Existing Workforce & Employment Profile

This section reviews the existing profile of employment generated within Forster - Tuncurry. It compares the characteristics of the labour force, key industries and employment trends to those experienced across NSW and the Mid North Coast Region.

Two main sources of data have been used, ABS Census Data for 2001 and 2006 and the Transport Data Centre's (TDC) Journey to Work Data 2006. The ABS Census collects data by household as to what occupation and industry its residents are employed. It also collects data concerning where people work and how they travel to work.

The TDC configures the ABS' Journey to Work data to identify the number of jobs within a region by industry and the number of residents within a region travelling to other locations for work in given industries. It is important to note that the TDC figures can differ from ABS data to a small degree as it accounts for errors and undercounts that may have occurred at the time of survey.

The size of the resident workforce refers to the number of people living in an area that work in or outside of that area. Jobs or employment by area on the other hand refers to the number of people stating they work in that given area. They may live in, or outside of that area.

The matching of 'place of work' by residents who live and work in that LGA or defined area with work generated in that area defines job containment.

4.1 Existing Employment Generated in Great Lakes LGA

Based on TDC Journey to Work Data, as of 2006 9,087 jobs were generated within the Great Lakes LGA. The top five industries related to Retail Trade (1,430 jobs or 16% of all jobs); Accommodation and Food Services (1,186 jobs or 13%); Health Care and Social Assistance (1,099 or 12%); Construction (869 jobs or 10%) and Education and Training (692 jobs or 8%).

The table below differs from the figures provided by the draft Great Lakes Employment Lands Strategy 2006 (draft GLELS 2006). The draft GLELS 2006 estimated jobs within the LGA as of 2001 to be in the order of 9,459. Consequently at first glance it would appear that the 2006 figure of 9,087 represents a net decline over the census period. This is not the case however as the source data differs.

Whilst both sets of figures are based on the ABS Census, as described above, Hill PDA's figures have been derived from the Journey to Work figures which show actual jobs generated or provided within the LGA. The figures applied by the draft GLELS 2006 showed the number of people residing within the LGA and the industries they were employed in irrespective of where they travelled to work (i.e. either within or outside of the LGA). Accordingly the latter represents a slight over count as it includes residents that work in alternative locations (i.e. outside of Great Lakes).

Table 13 - Jobs generated within Great Lakes LGA 2006

Industry Category	Jobs	% of total
Agriculture, Forestry and Fishing	480	5%
Mining	40	0%
Manufacturing	512	6%
Electricity, Gas, Water and Waste Services	172	2%
Construction	869	10%
Wholesale Trade	164	2%
Retail Trade	1,430	16%
Accommodation and Food Services	1,186	13%
Transport, Postal and Warehousing	268	3%
Information Media and Telecommunications	67	1%
Financial and Insurance Services	178	2%
Rental, Hiring and Real Estate Services	296	3%
Professional, Scientific and Technical Services	331	4%
Administrative and Support Services	214	2%
Public Administration and Safety	468	5%
Education and Training	692	8%
Health Care and Social Assistance	1,099	12%
Arts and Recreation Services	180	2%
Other Services	349	4%
Inadequately described	62	1%
Not stated	30	0%
	9,087	**100%**

Source: TDC 2006, Hill PDA

* Yellow highlight indicates top 5 industries

4.2 Where do Great Lakes Residents Work?

Using the TDC Journey to Work Data it is possible to clarify the number of Great Lakes residents who work in the LGA and the number who must travel outside of the LGA for employment. It is also possible to identify how they travel to work.

Analysis of the table below shows that the largest portion of Great Lake's residents work within the LGA (72%). This means that of the 10,600 Great Lake's residents who work (i.e. who are in the labour force) 7,605 are employed in the LGA.

Whilst Great Lakes has a high job containment rate (there are a high proportion of Great Lakes residents who work in the LGA) the vast majority (63%) travel to work by car. Whilst only 2% of workers rode a bicycle to their workplace destination and 7% walked, less than 1% recorded using public transport. This may indicate the limited availability or suitability of public transport for travel to work and distances required to travel.

The remaining 28% of residents travel outside of the LGA to workplace destinations. The bulk of this category (7%) travel to Greater Taree owing to its close proximity to the largest portion of the population (Forster - Tuncurry) in the north of the LGA. A further 2% travel to Port Stephens, 2% to Newcastle and 2% to Sydney. The vast majority of these workers travelled to these alternative destinations by car either as a driver or as a passenger. This modal choice is a likely reflection of the convenience of the private car and the lack of convenient interregional public transport alternatives.

Table 14 - Work Destinations for Great Lakes Residents

	Great Lakes	Sydney	Newcastle	Greater Taree	Lake Macquarie	Maitland	Port Stephens	Gloucester	Other	Total
Train	0	8	0	0	0	0	0	0	4	12
Bus	32	12	0	0	0	0	4	0	6	54
Ferry	3	0	0	0	0	0	0	3	0	6
Tram	0	0	0	0	0	0	0	0	3	3
Taxi	7	0	0	5	0	0	0	3	0	15
Car driver	4235	104	161	611	39	56	183	40	760	6,189
Car passenger	558	6	13	59	3	0	11	0	110	760
Truck	155	9	4	6	0	4	3	0	114	295
Motorbike/scooter	39	0	0	16	0	0	6	0	0	61
Bicycle	122	0	0	0	3	0	0	0	11	136
Other and Not stated	163	7	0	12	0	0	5	0	129	316
Walked only	564	6	0	3	0	0	4	0	29	606
Worked at home	688	9	0	8	0	0	6	3	36	750
Did not go to work	1039	19	32	68	10	8	38	10	179	1,403
	7605	**180**	**210**	**788**	**55**	**68**	**260**	**59**	**1,381**	**10,606**

Source: TDC 2006, Hill PDA

4.3 Who Travels to Great Lakes to Work?

An alternative method of assessing employment provision is a review of job containment. This method looks at the number of local people employed in a given area compared to the number of jobs generated within that area. In the Great Lakes case, 7,605 local residents are employed by the 9,095 jobs generated within the LGA or 84%.

An 84% containment rate is considered high. It exceeds the containment rates of all LGAs in the Sydney Metropolitan Region. A higher containment rate may however be expected for a regional LGA that has greater travel distances to alternative places of work. It may also be expected for an LGA that does not have relative proximity to a Major Regional City such as Newcastle or is some distance from Port Macquarie.

A high job containment is considered desirable as it indicates that local job provision matches local skills well. It also indicates the opportunity to reduce travel and for more sustainable methods of travel to work to be encouraged.

Close to 1,500 employees who are not residents of Great Lakes travel to the LGA to work. The vast majority of these workers reside in Greater Taree (67%). A smaller portion of workers travel from Port Stephens, Maitland, Gloucester, Lake Macquarie and Sydney to work in Great Lakes.

Table 15 - Place of Residence for Persons Employed in Great Lakes

	Great Lakes	Sydney	Newcastle	Greater Taree	Lake Macquarie	Maitland	Port Stephens	Gloucester	Hastings	Other	Total
Train	0	0	0	0	0	0	0	0	0	0	0
Bus	32	0	0	8	0	0	0	3	0	0	43
Ferry	3	0	0	0	0	0	3	0	0	0	6
Tram	0	0	0	0	0	0	0	0	0	0	0
Taxi	7	0	3	0	0	0	0	0	3	0	13
Car driver	4,235	29	34	748	34	19	61	33	20	75	5,288
Car passenger	558	0	8	63	3	0	4	8	4	13	661
Truck	155	6	3	14	0	0	0	0	4	6	188
Motorbike/scooter	39	0	0	10	0	4	0	0	0	0	53
Bicycle	122	0	0	0	0	0	0	0	0	0	122
Other / Not stated	163	0	0	19	0	0	3	3	0	7	195
Walked only	564	0	0	8	0	0	0	0	0	13	585
Worked at home	688	3	0	9	0	0	3	0	0	18	721
Did not go to work	1,039	6	15	119	8	0	8	6	0	19	1,220
	7,605	**44**	**63**	**998**	**45**	**23**	**82**	**53**	**31**	**151**	**9,095**

Source: TDC 2006, Hill PDA

4.4 Forster - Tuncurry's Employment Generating Industries

In order to provide a sound basis for the strategy, Hill PDA commissioned the ABS to provide employment data by industry category for each 'Place of Work' or 'Work Zone' in Great Lakes LGA. This data is derived from the ABS Census Data 2006 and the question *"Where do you work"*. It is a more detailed estimate of jobs generated within centres in Forster - Tuncurry. Hill PDA has manipulated the raw data for the Forster, Tuncurry and Forster Keys Work Zones into tables that can be used to inform this Strategy.

Analysing the results of the research data shown in the table below, 5,777 jobs were generated in Forster - Tuncurry as of 2006. This represents 64% of all jobs in the Great Lakes LGA. The main jobs were generated in the following industries:

- Retail Trade (1,038 jobs or 19% of jobs);
- Accommodation and Food Services (704 or 12% of jobs);
- Health Care and Social Assistance (885 or 13% of jobs);
- Construction (416 or 7% of jobs);
- Education and Training (437 or 7% of jobs); and
- Public Administration and Safety (380 or 7% of jobs).

The predominance of jobs in the top six industries listed above can be clearly explained by:

- Forster - Tuncurry's tourist focus and therefore supply of visitor accommodation;
- the town's role as a major centre and therefore its high provision of retail and commercial floorspace in comparison to other centres including the largest shopping precinct (Breese Parade) in the LGA;

- the high rate of retirement and aged care facilities being developed to meet demands of one of the proportionally oldest communities in NSW in addition to the associated support industries;
- the location of schools and the TAFE; and
- the location of Council's offices and depots within Forster - Tuncurry.

The industries described above reflect the main employment generating industries described for the Great Lakes LGA. This is to be expected as Forster - Tuncurry generates the majority of employment within the LGA.

Table 16 - Jobs by Place of Work by Industry Category – Study Area

Industry Category	Jobs	Share of Total Jobs
Agriculture, Forestry and Fishing	113	2%
Mining	0	0%
Manufacturing	297	5%
Electricity, Gas, Water and Waste Services	144	2%
Construction	416	7%
Wholesale Trade	87	2%
Retail Trade	1038	19%
Accommodation and Food Services	704	12%
Transport, Postal and Warehousing	145	3%
Information Media and Telecommunications	41	1%
Financial and Insurance Services	142	3%
Rental, Hiring and Real Estate Services	181	3%
Professional, Scientific and Technical Services	232	4%
Administrative and Support Services	112	2%
Public Administration and Safety	380	7%
Education and Training	437	7%
Health Care and Social Assistance	885	13%
Arts and Recreation Services	124	2%
Other Services	269	5%
Inadequately described	30	1%
Total	**5,777**	**100%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

* Yellow highlight indicates top 6 employment generating industries

4.5 Job Distribution within Forster - Tuncurry

For a more detailed analysis of job distribution within the Study Area, the tables below show jobs generated by Work Zone by Industry for Forster, Tuncurry and Forster Keys.

In respect to Forster, 3,552 jobs were generated or 61% of all jobs in the Study Area as of 2006. The main employment generating industries were:

- Retail Trade (768 jobs or 22% of jobs);
- Accommodation and Food Services (509 or 14% of jobs);
- Health Care and Social Assistance (420 or 12% of jobs);
- Construction (270 or 8% of jobs); and
- Public Administration and Safety (293 or 8% of jobs).

As of 2006 1,778 jobs were generated in Tuncurry or 31% of all jobs in the Study Area. The main jobs related to:

- Retail Trade (257 jobs or 14% of jobs);
- Accommodation and Food Services (152 or 9% of jobs);
- Health Care and Social Assistance (300 or 17% of jobs); and
- Education and Training (227 or 13% of jobs); and
- Public Administration and Safety (293 or 8% of jobs).

The last column of the table shows percentage points that indicate proportionally how the jobs generated in Forster differ by industry from Tuncurry. It is apparent that Forster has a significantly greater proportion (as well as number) of jobs in retail, accommodation and food services (figures shown in blue). This may be expected as a result of the areas range of tourist accommodation and the presence of the large Stockland shopping centre in the Breese Parade Centre. Forster also has a higher proportion and number of public administration and safety jobs which we attribute to the Council's offices and associated services.

Forster has a lower proportion of jobs in wholesale trade, education and training, however it has a greater number of jobs in both categories – wholesale trade (43 or 1.2% compared to Tuncurry's 40 or 2.2%) and education and training (293 or 8% compared to Tuncurry's 227 or 13%). The latter is a likely result of the TAFE's location in Tuncurry. Interestingly however Tuncurry had a greater proportion of jobs in health care, social assistance, arts and recreation.

Both areas had equal proportions of jobs in manufacturing although the number generated in Forster (190) significantly exceeds the number generated in Tuncurry (95).

Table 17 - Jobs by Place of Work by Industry Category – Forster

Industry Category	Jobs	Proportion	Comparison to Tuncurry
Agriculture, Forestry and Fishing	62	1.7%	-0.6%
Mining	0	0.0%	0.0%
Manufacturing	190	5.3%	0.0%
Electricity, Gas, Water and Waste Services	23	0.6%	-3.8%
Construction	270	7.6%	0.7%
Wholesale Trade	43	1.2%	-1.0%
Retail Trade	768	21.6%	7.2%
Accommodation and Food Services	509	14.3%	5.8%
Transport, Postal and Warehousing	103	2.9%	0.8%
Information Media and Telecommunications	24	0.7%	-0.1%
Financial and Insurance Services	111	3.1%	1.6%
Rental, Hiring and Real Estate Services	132	3.7%	1.1%
Professional, Scientific and Technical Services	152	4.3%	0.4%
Administrative and Support Services	59	1.7%	-0.5%
Public Administration and Safety	293	8.2%	3.7%
Education and Training	143	4.0%	-8.7%
Health Care and Social Assistance	420	11.8%	-5.0%
Arts and Recreation Services	77	2.2%	-0.5%
Other Services	155	4.4%	-1.3%
Inadequately described	18	0.5%	0.0%
Total	**3,552**	**100.0%**	**0.0%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

* Yellow highlight indicates top 5 employment generating industries

Table 18 - Jobs by Place of Work by Industry Category – Tuncurry

Industry Category	Jobs	Proportion	Comparison to Forster
Agriculture, Forestry and Fishing	42	2.3%	0.6%
Mining	0	0.0%	0.0%
Manufacturing	95	5.3%	0.0%
Electricity, Gas, Water and Waste Services	80	4.5%	3.8%
Construction	124	6.9%	-0.7%
Wholesale Trade	40	2.2%	1.0%
Retail Trade	257	14.4%	-7.2%
Accommodation and Food Services	152	8.5%	-5.8%
Transport, Postal and Warehousing	37	2.1%	-0.8%
Information Media and Telecommunications	14	0.8%	0.1%
Financial and Insurance Services	28	1.6%	-1.6%
Rental, Hiring and Real Estate Services	46	2.6%	-1.1%
Professional, Scientific and Technical Services	69	3.9%	-0.4%
Administrative and Support Services	38	2.1%	0.5%
Public Administration and Safety	81	4.5%	-3.7%
Education and Training	227	12.7%	8.7%
Health Care and Social Assistance	300	16.8%	5.0%
Arts and Recreation Services	47	2.6%	0.5%
Other Services	102	5.7%	1.3%
Inadequately described	9	0.5%	0.0%
Total	**1,788**	**100%**	**0.0%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

* Yellow highlight indicates top 5 employment generating industries

With respect to Forster Keys, 437 jobs were generated within this travel zone as of 2006 or 8% of all jobs in the Study Area. Unlike Forster and Tuncurry, retail trade and other tourist related uses were not the main employment generating industries. Rather the main industries were as follows:

- Health Care and Social Assistance (165 or 39% of jobs);
- Education and Training (67 or 15% of jobs);
- Accommodation and Food Services (43 or 10% of jobs);
- Electricity, Gas, Water and Waste Services (41 or 9% of all jobs); and
- Construction (22 or 5% of jobs).

The composition of jobs in Forster Keys, as shown above, is a likely result of the existing school and the retirement services that have been recently developed. The number of electricity, gas, water and waste service related jobs is a result of the Mid Coast Water facility at Sweet Pea Road and indicates the importance of this provider to local job generation.

Table 19 - Jobs by Place of Work by Industry Category – Forster Keys

Industry Category	Jobs	Proportion
Agriculture, Forestry and Fishing	9	2.1%
Mining	0	0.0%
Manufacturing	12	2.7%
Electricity, Gas, Water and Waste Services	41	9.4%
Construction	22	5.0%
Wholesale Trade	4	0.9%
Retail Trade	13	3.0%
Accommodation and Food Services	43	9.8%
Transport, Postal and Warehousing	5	1.1%
Information Media and Telecommunications	3	0.7%
Financial and Insurance Services	3	0.7%
Rental, Hiring and Real Estate Services	3	0.7%
Professional, Scientific and Technical Services	11	2.5%
Administrative and Support Services	15	3.4%
Public Administration and Safety	6	1.4%
Education and Training	67	15.3%
Health Care and Social Assistance	165	37.8%
Arts and Recreation Services	0	0.0%
Other Services	12	2.7%
Inadequately described	3	0.7%
Total	**437**	**100%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

* Yellow highlight indicates top 5 employment generating industries

4.6 How Does Forster - Tuncurry Compare?

In order to better understand how Forster - Tuncurry (including jobs generated in Forster Keys) compares to other centres within the Great Lakes LGA, the following tables have been compiled using the ABS Travel to Work data.

The tables show that the predominant market share of jobs by all industries is located in Forster - Tuncurry. In fact 64% of all jobs generated within Great Lakes are generated within Forster - Tuncurry. This includes 37% of manufacturing jobs; 45% of electricity, gas, water and waste service related jobs; 42% of retail jobs; 45% of financial and insurance jobs as well as 41% of professional, scientific and technical service related jobs.

The Study Area has the greatest share of jobs in Retail Trade (18%) and Health Care and Social Assistance (15.3%) in the LGA. It has the lowest proportional share of jobs in Agriculture, Forestry and Fishing (2%); Mining (0%) and interestingly Construction (7.2%).

Table 20 - Location of Market Share of Jobs by Industry for Forster - Tuncurry compared to other Centres

Industry Category	Nabiac	Study Area	Boomerang Beach	Karuah/Tea Gardens	Bulahdelah	Rural Balance	Total
Agriculture, Forestry, Fishing	6.16%	18.83%	2.87%	5.75%	8.83%	53.18%	100.00%
Mining	12.82%	0.00%	0.00%	7.69%	0.00%	79.49%	100.00%
Manufacturing	5.29%	36.80%	3.92%	6.47%	8.63%	17.45%	100.00%
Electricity, Gas, Water, Waste	0.00%	45.71%	0.00%	2.92%	6.43%	6.43%	100.00%
Construction	10.87%	32.47%	10.98%	16.07%	2.43%	11.56%	100.00%
Wholesale Trade	9.09%	34.52%	6.67%	13.33%	3.03%	15.15%	100. 00%
Retail Trade	4.28%	42.14%	3.58%	9.12%	6.39%	3.79%	100.00%
Accommodation & Food	3.51%	37.07%	10.04%	13.22%	7.11%	7.20%	100.00%
Transport, Postal, Warehousing	4.96%	35.63%	1.15%	10.69%	11.07%	16.79%	100.00%
Information Media and Telecommunications	0.00%	39.81%	4.84%	9.68%	8.06%	11.29%	100.00%
Financial and Insurance Services	0.00%	44.51%	2.26%	8.47%	2.26%	6.78%	100.00%
Rental, Hiring, Real Estate	3.52%	38.92%	8.10%	16.20%	4.93%	3.52%	100.00%
Professional, Scientific & Technical Services	6.53%	40.77%	6.53%	10.98%	1.19%	5.93%	100.00%
Administrative Support Services	9.48%	34.67%	8.06%	14.22%	2.37%	12.80%	100.00%
Public Administration & Safety	1.73%	45.13%	2.60%	4.11%	4.98%	4.33%	100.00%
Education and Training	4.47%	38.67%	5.77%	8.23%	11.83%	6.64%	100.00%
Health Care & Social Assistance	1.26%	44.34%	1.80%	5.40%	9.00%	2.88%	100.00%
Arts & Recreation Services	5.26%	39.49%	11.58%	8.42%	6.84%	2.63%	100.00%
Other Services	6.96%	42.83%	2.51%	7.24%	3.90%	4.46%	100.00%
Inadequately described	5.00%	33.33%	5.00%	11.67%	0.00%	28.33%	100.00%
Total	**4.74%**	**63.73%**	**5.39%**	**9.54%**	**6.54%**	**10.05%**	**100.00%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

Table 21 - Percentage Share of Jobs by Industry for Forster - Tuncurry compared to other Centres

Industry Category	Nabiac	Study Area	Boomerang Beach	Karuah / Tea Gardens	Bulahdelah	Rural Balance	Market Share Total
Agriculture, Forestry, Fishing	7.0%	2.0%	2.9%	3.2%	7.3%	28.4%	5.4%
Mining	1.2%	0.0%	0.0%	0.3%	0.0%	3.4%	0.4%
Manufacturing	6.3%	5.1%	4.1%	3.8%	7.4%	9.8%	5.6%
Electricity, Gas, Water, Waste	0.0%	2.5%	0.0%	0.6%	1.9%	1.2%	1.9%
Construction	21.9%	7.2%	19.4%	16.1%	3.5%	11.0%	9.5%
Wholesale Trade	3.5%	1.5%	2.2%	2.5%	0.8%	2.7%	1.8%
Retail Trade	14.2%	18.0%	10.4%	15.0%	15.3%	5.9%	15.7%
Accommodation & Food	9.8%	12.2%	24.5%	18.3%	14.3%	9.4%	13.2%
Transport, Postal, Warehousing	3.0%	2.5%	0.6%	3.2%	4.9%	4.8%	2.9%
Information Media and Telecommunications	0.0%	0.7%	0.6%	0.7%	0.8%	0.8%	0.7%
Financial and Insurance Services	0.0%	2.5%	0.8%	1.7%	0.7%	1.3%	2.0%
Rental, Hiring, Real Estate	2.3%	3.1%	4.7%	5.3%	2.4%	1.1%	3.1%
Professional, Scientific & Technical Services	5.1%	4.0%	4.5%	4.3%	0.7%	2.2%	3.7%
Administrative Support Services	4.7%	1.9%	3.5%	3.5%	0.8%	3.0%	2.3%
Public Administration & Safety	1.9%	6.6%	2.5%	2.2%	3.9%	2.2%	5.1%
Education and Training	7.2%	7.6%	8.2%	6.6%	13.8%	5.0%	7.6%
Health Care & Social Assistance	3.3%	15.3%	4.1%	6.9%	16.9%	3.5%	12.3%
Arts & Recreation Services	2.3%	2.1%	4.5%	1.8%	2.2%	0.5%	2.1%
Other Services	5.8%	4.7%	1.8%	3.0%	2.4%	1.8%	4.0%
Inadequately described	0.7%	0.5%	0.6%	0.8%	0.0%	1.9%	0.7%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: ABS 2006, Hill PDA

Note: 'Jobs' refers to persons employed

4.7 Location Quotient

In order to better understand the characteristics of employment in Forster - Tuncurry as of 2006 and the strengths and weaknesses of given industries, a method of assessment called 'Location Quotients' has been utilised.

This method compares the proportional size of an industry within Forster - Tuncurry with another area. This comparative analysis allows for an understanding of industry under representation or need. It also shows industries that are excelling within the Study Area.

For the purposes of this assessment, two regions have been chosen for comparison. The first being the Mid North Coast. As shown in the table below, compared to this Region, Forster - Tuncurry has a low representation of jobs in mining; agriculture, forestry and fishing; transport, postal & warehousing; wholesale trade; manufacturing; administrative support and services.

Where the ratio equals to 1 there is an equal distribution of jobs between both areas however where the number exceeds 1, this represents a greater portion of jobs within that industry for Forster - Tuncurry than the Mid North Coat Region.

Compared to the Mid North Coast, Forster - Tuncurry has a greater proportion of jobs in health care and financial services; retail trade; arts and recreation services; accommodation and food services.

Table 22 - Location Quotient – Forster - Tuncurry Compared to Mid North Coast 2006

Industry Category	F/T to Mid North Coast	Jobs
Mining	0.0	0
Inadequately described/Not stated	0.2	30
Agriculture, forestry & fishing	0.4	113
Wholesale trade	0.5	87
Transport, postal & warehousing	0.6	145
Information media & telecommunications	0.6	41
Manufacturing	0.7	297
Administrative & support services	0.7	112
Construction	0.8	416
Education & training	0.9	437
Professional, scientific & technical services	1.1	232
Public administration & safety	1.1	380
Retail trade	1.2	1,038
Financial & insurance services	1.2	142
Health care & social assistance	1.2	885
Other services	1.2	269
Accommodation & food services	1.3	704
Arts & recreation services	1.6	124
Electricity, gas, water & waste services	1.6	144
Rental, hiring & real estate services	1.7	181
		5,777

Source: ABS 2006, Hill PDA

Applying the same interpretive logic for comparison to NSW, Forster - Tuncurry has a noticeably lower proportion of jobs relating to mining, wholesale trade; information media and telecommunications; manufacturing; transport and warehousing; professional, scientific, information; financial and insurance and administrative jobs. Therefore the Study Area does not only lack proportionally in office based jobs but also manufacturing and distribution.

In comparison to NSW, where Forster - Tuncurry does fair well is in services such as health care and social assistance, retail trade, arts and recreation, accommodation and utilities.

The above analysis is also successful in highlighting the employment differences between the Mid North Coast and wider NSW. It is apparent that the Mid North Coast, as a Region, has a strong orientation towards tourism and associated services (retail trade, accommodation) as well as agriculture and primary industries given its regional location and high environmental value. Comparatively across NSW the influence of Global Sydney is apparent with fewer primary industry jobs proportionally and a greater share of professional, office based occupations.

Table 23 - Location Quotient – Forster - Tuncurry Compared to NSW 2006

	F/T to NSW	Jobs
Mining	0.0	0
Inadequately described/Not stated	0.2	30
Wholesale trade	0.3	87
Information media & telecommunications	0.3	41
Manufacturing	0.5	297
Transport, postal & warehousing	0.5	145
Financial & insurance services	0.5	142
Professional, scientific & technical services	0.5	232
Administrative & support services	0.6	112
Agriculture, forestry & fishing	0.7	113
Construction	1.0	416
Education & training	1.0	437
Public administration & safety	1.1	380
Other services	1.2	269
Health care & social assistance	1.5	885
Retail trade	1.6	1,038
Arts & recreation services	1.6	124
Rental, hiring & real estate services	1.8	181
Accommodation & food services	1.9	704
Electricity, gas, water & waste services	2.5	144
Total		**5,777**

Source: ABS 2006, Hill PDA

5. Relevant Planning Policies and Strategies

5.1 State Plan

The NSW State Plan identifies challenges and opportunities facing NSW whilst recognising the need for Governments to *'reconcile competing demands in an environment of constant social and economic change'.* The Plan sets out the following key goals and priorities relevant to this Implementation Strategy:

- NSW Open for Businesses:
  - increase business investment;
  - maintain and invest in infrastructure;
  - cut red tape; and
  - facilitate more people participating in education and training throughout their life.
- Stronger Rural and Regional Economies:
  - increase business investment in rural and regional NSW; and
  - enhance access to training in rural and regional NSW to support local economies.
- Strengthening Aboriginal Communities:
  - improve health and education for Aboriginal people.
- Healthy Communities:
  - improve access to quality healthcare.
- Build Harmonious Communities:
  - increase participation and integration in community activities.
- Opportunity and support for the most vulnerable.
- Practical Environmental Solutions:
  - better environmental outcomes for native vegetation, biodiversity, land, rivers and coastal waterways.
- Improve Urban Environments through:
  - jobs closer to home;
  - housing affordability;
  - the efficiency of the road network; and
  - more people using parks, sporting and recreational facilities and participating in the arts and cultural activity.

5.2 State Infrastructure Strategy

The NSW State Infrastructure Strategy lists the infrastructure projects that are funded during the 2006-07 financial year and beyond. According to the Strategy, the NSW State Government will invest almost $10 billion during the 2006-07 financial year on infrastructure throughout the State. This infrastructure includes projects relating to human services, transport, electricity, justice and water.

According to the Strategy, the increase in demand for infrastructure will be a result of the following influences:

- population growth and distribution;
- ageing and longevity;
- technological change;
- industrial and commercial developments;
- cost pressures;
- infrastructure renewal; and
- environmental issues.

The Strategy divides the State into smaller, more manageable regions. Forster - Tuncurry and the Great Lakes LGA forms part of the Hunter Region.

According to the Strategy, the Hunter's economic base is rapidly diversifying, shifting from reliance on traditional primary and secondary industries to a wide range of service industries.

The Strategy includes funding for the following projects within the Hunter Region:

- Bohnock Tee to Forster 66kV feeder; and
- the Pacific Highway, Failford Road to Tritton Road upgrade (State & Federal Funding).

5.3 Standard Instrument (Local Environmental Plans) Order 2006 & Standard Principal Instrument LEP 2008

In order to simplify and unify the NSW Planning System, the DoP prepared the Standard Instrument (Local Environmental Plans) Order 2006 (hereafter referred to as the Standard LEP Template) and the Standard Instrument – Principal LEP 2008 as amended. The Standard LEP Template established standard planning zones and land use definitions to be adopted by all Councils within NSW. The land uses zones are:

- rural zones;
- residential zones;
- business zones;

- industrial zones;
- special purpose zones;
- recreation zones;
- environmental protection zones; and
- waterway zones.

The various zones that facilitate employment generating uses and are of relevance to this study are listed in the accompanying table. The table provides the mandatory standard objectives of each zone in black font as well as additional objectives and uses in blue font that are recommended by this study for addition to the zones as 'permitted with consent'. The additional proposed objectives and uses to be permitted with consent are discussed further and justified

Each Council in NSW is required to amend their local development plans to accord with the LEP Standard Template by 2011. The amended LEPs should also accord with the objectives of the Regional Strategies prepared by the DoP.

Table 24 - Relevant Standard LEP Template Zones with Proposed Additional Objectives & Uses in Blue

EMPLOYMENT ZONES	Zone Objectives, Mandated Uses & Other Recommended Uses to be Permitted with Consent
IN2 – Light Industrial Zone	**Objectives:** • To provide a wide range of light industrial, warehouse and related land uses. • To encourage employment opportunities and to support the viability of centres. • To minimise any adverse effect of industry on other land uses. • To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area. **Mandated Uses:** Depots; Light industries; Neighbourhood shops; Warehouse or distribution centres. **Other Possible Uses:** Animal boarding or training establishments; Boat repair facilities; Industry retail outlets **;** Landscape and garden supplies; Passenger transport facilities; Research stations; Self storage units; Rural supplies; Service stations; Timber and building supplies; Transport depot; Vehicle body repair workshops; Vehicle repair stations; Vehicle sales and hire premises; Vetinary hospitals; Wholesale supplies.

EMPLOYMENT ZONES	Zone Objectives, Mandated Uses & Other Recommended Uses to be Permitted with Consent
IN4 – Working Waterfront	**Objectives:** • To retain and encourage waterfront industrial and maritime activities. • To identify sites for maritime purposes and for activities that require direct waterfront access. • To encourage employment opportunities. • To minimise any adverse effect of development on land uses in other zones. • To provide a diverse range of uses which are complementary and ancillary to existing industrial uses to ensure their ongoing viability. **Mandated Uses:** Boat launching ramps; Boat repair facilities; Jetties; Light industries **Other Possible Uses:** Aquaculture; Boat sheds; Charter and tourism boating facilities; take-away food and drink premises; Marina; Port facilities; Recreation area; Recreation facility (outdoor); Research station; Restaurant; Signage; Water recreation structures.

EMPLOYMENT ZONES	Zone Objectives, Mandated Uses & Other Recommended Uses to be Permitted with Consent
B1 – Neighbourhood Centre	**Objectives:** • To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood. • To permit shop top residential or other similar development that is unlikely to significantly prejudice the supply of retail or business floorspace. **Mandated Uses:** Business premises; Child Care Centres; Community facilities; Neighbourhood shops; Shop top housing. **Other Possible Uses:** Home business; Recreation facility (indoor); restaurant
B2 – Local Centre	**Objectives:** • To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. • To encourage employment opportunities in accessible locations. • To maximise public transport patronage and encourage walking and cycling. • To permit shop top residential or other similar development that is unlikely to significantly prejudice the supply of retail or business floorspace. **Mandated Uses:** Business premises; Child Care Centres; Community Facilities; Educational establishments; Entertainment Facilities; Function centres; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Service stations; Shop top housing; Tourist and visitor accommodation. **Other Possible Uses:** Nightclubs

B3 – Commercial Core	**Objectives:** • To provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community. • To encourage appropriate opportunities in accessible locations. • To maximise public transport patronage and encourage walking and cycling. **Mandated Uses:** Business premises; Child Care Centres; Community Facilities; Educational establishments; Entertainment Facilities; Function centres; Hotel accommodation; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises. **Other Possible Uses:** N/A
EMPLOYMENT ZONES	**Zone Objectives, Mandated Uses & Other Recommended Uses to be Permitted with Consent**
B4 – Mixed Use	**Objectives:** • To provide a mixture of compatible land uses. • To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling. • To enable the development of a diverse and compatible range of non-residential uses which: a. Do not adversely impact on traffic movements in the locality; and b. Support the sustainability of the established business centre. **Mandated Uses:** Boarding houses; Business premises; Child care centres; Community facilities; Educational establishments; Entertainment facilities; Function centres; Hotel accommodation; Information and education facilities; Office premises; Passenger Transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Seniors housing; Shop top housing. **Other Possible Uses:** Home business; Tourist and visitor accommodation; Vehicle sales or hire premises; Public administration building

B5 – Business Development	**Objectives:** • To enable a mix of business and warehouse uses, and specialised retail uses that require a large floor area, in locations that are close to, and that support the viability of, centres. • To facilitate the establishment of bulky goods retail uses that do not adversely impact on adjoining residential development, that do not significantly detract from the amenity of the area and are unlikely to prejudice the sustainability of the established business and industrial areas. **Mandated Uses:** Child care centres; Passenger transport facilities; Warehouse or distribution centres **Other Possible Uses:** Bulky goods premises; Community facilities; Health services facility; Light industries; Office premises; Public administration building; Restaurants; Pubs; Signage; Timber and building supplies; Vehicle sales or hire premises; Industry retail outlets.

EMPLOYMENT ZONES	Zone Objectives, Mandated Uses & Other Recommended Uses to be Permitted with Consent
W1 Natural Waterways	**Objectives:** • To protect the ecological and scenic values of natural waterways. • To prevent development that would have an adverse effect on the natural values of waterways in this zone. • To provide for sustainable fishing industries and recreational fishing. • To provide for sustainable recreation, boating and tourist related facilities. **Mandated Uses:** Environmental facilities; Environmental protection works **Other Possible Uses:** Aquaculture, boat repair facilities; boat sheds, charter and tourism boating activity; environmental facilities; moorings; marinas; port facilities; recreational facilities (outdoors); cafes; restaurants.

5.4 Mid-North Coast Regional Strategy 2008

The NSW Government has prepared the Mid-North Coast Regional Strategy to establish the guiding principles for how the future growth of the Mid North Coast will be planned and managed.

The Regional Strategy applies to the eight local government areas of Clarence Valley, Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie–Hastings, Greater Taree and Great Lakes, and is one of a number of regional strategies prepared by the Department of Planning.

Over the past 25 years, the Mid North Coast has experienced a 70% population increase reflecting a considerable amount of growth and change. Forster - Tuncurry was one of the main areas within the region that experienced a large portion of this growth.

The Strategy sets a target of 58,400 additional dwellings over the next 25 years, 15,000 of these within the Manning Valley – Great Lakes Subregion. The Strategy identifies Forster - Tuncurry as suitable for higher density housing so as to provide a range of housing options.

Using current employment participation rates and population projections, it is expected that capacity for an additional 47,000 jobs within the Region will need to be created. To accommodate this job growth, an additional 225ha of industrial land and about 203ha of commercial land (total 428 hectares) is forecast as necessary within the Region. Of the industrial land, 38ha is required within the Manning Valley - Great Lakes Subregion.

The Strategy defines Forster - Tuncurry as a Major Town and Bulahdelah as a Town. Stroud and Nabiac are defined as inland villages and all other centres (Green Point, Pacific Palms, Smiths Lake, Coomba Park) are defined as coastal villages.

5.5 National Climate Change Adaptation Framework

The Council of Australian Governments requested the development of a National climate change Adaptation Framework in February 2006 as part of its Plan of Collaborative Action on Climate Change. This Framework outlines the future agenda of collaboration between governments to address key demands from businesses and the community. The framework also seeks to clarify information relating to climate change impacts, and to fill critical knowledge gaps which currently inhibit effective adaptation. A key focus of the Framework is to support decision-makers and to understand and incorporate climate change into policy and operational decisions at all scales and across all vulnerable sectors.

Major regions across Australia face considerable risks from climate change impacts, and in many cases these risks will span a range of sectors. Effective decision-making will need to be supported by integrated, multi-disciplinary assessments of vulnerability to climate change.

Forster - Tuncurry is located on the Australian East coast and is vulnerable to sea level rise, increased sea surface temperature, increased storm intensity and frequency, ocean acidification and changes to rainfall, run-off, wave size, wave direction and ocean currents. Understanding the implications of sea level rise for coastal planning will require insights from climate scientists, engineers, ecologists, economists and planners.

The impact of climate change on infrastructure and the natural environment has the potential to affect the tourism industry. As tourist attractions, coastal regions are particularly vulnerable locations.

The physical infrastructure and the social and economic fabric of settlements are likely to be affected by climate change, especially by a change in frequency and intensity of extreme weather events.

The Framework seek to guide action over the next five to seven years to:

- support decision-makers with practical guides and tools to assist in managing climate change impacts;
- establish a new centre for climate change adaptation to provide decision-makers with robust and relevant information on climate change impacts, vulnerability and adaptation options;

- provide, for the first time, climate change projections and regional scenarios at scales relevant to decision-makers;
- generate the knowledge to understand and manage climate change risks to water resources, biodiversity, coasts, agriculture, fisheries, forestry, human health, tourism, settlements and infrastructure; and
- work with stakeholders in key sectors to commence developing practical strategies to manage the risks of climate change impacts.

5.6 State Environmental Planning Policies

State Environmental Planning Policy No 71 – Coastal Protection

SEPP No. 71 was updated most recently on the 7th December 2005 and aims to protect, preserve, improve and manage the range of natural, built, cultural, recreational and economic attributes of the New South Wales coast.

5.7 Regional Environmental Plans

Hunter Regional Environmental Plan 1989

The Hunter Regional Environmental Plan (REP) 1989 applies to a number of local government areas with the Hunter Region including the Great Lakes LGA.

The REP aims to:

- promote the balanced development of the Region, the improvement of its urban and rural environments the orderly and economic development and optimum use of its land and other resources. These actions are to be consistent with the conservation of natural and man made features and meet the needs and aspirations of the community;
- co-ordinate activities related to development in the Region, so there is optimum social and economic benefit to the community; and
- continue a regional planning process that will serve as a framework for identifying priorities for further investigations to be carried out by the Department of Planning and other agencies.

The Plan must be considered in the preparation of local environmental plans, codes and policies and in the assessment of development applications within the Great Lakes Council LGA.

5.8 Local Environmental Plans

Great Lakes Local Environmental Plan 1996

The Great Lakes Local Environmental Plan 1996 is an environmental planning instrument used to manage development and conservation in the Great Lakes LGA. In the hierarchy of Council's environmental planning documents, it stands at the top, providing broad direction.

The aims of this Plan are to:

- protect and enhance the environmental qualities of the area;
- facilitate the orderly and economic development of land within the area; and
- promote the well-being of the area's population.

The objectives of this Plan are to:

- provide a land use framework to guide the future use of the land within Great Lakes;
- protect environmentally sensitive areas and the heritage of the area;
- improve opportunities for ecologically sustainable development; and
- provide for the cultural needs, and the equitable provision of services and facilities for the community.

Of particular relevance to this Study is the 4(a) General Industrial zone that permits commercial, retail, service and other development of land where it does not have a materially detrimental effect on the amenity of any adjoining residential areas, and that:

(i) is ancillary to the use of land within the zone for industrial, service and storage purposes; or

(ii) is primarily intended to provide personal services to persons occupied or employed in carrying out development otherwise permitted in the zone; or

(iii) is associated with an industrial environment; or

(iv) provides for relatively low-intensity commercial and retail uses with extensive floor space requirements which, by nature of the activity conducted, require direct and easy access to motor vehicle parking areas for loading purposes; and is unlikely to prejudice the viability of established retail and commercial centres.

Development Control Plan (DCP) 51 Forster / Tuncurry Town Centres

Great Lakes Council adopted DCP 51 Forster / Tuncurry Town Centres in July 2008. The DCP has been prepared in accordance with the provisions of the Environmental Planning and Assessment Act 1979 and the Environmental Planning and Assessment Regulation 2000.

The DCP was developed to provide clear objectives and detailed planning controls to encourage quality urban design, a high level of residential amenity and environmental sustainability in high and medium density residential and mixed-use development in the Forster - Tuncurry Town Centres.

The DCP also provides development standards and design guidelines for commercial and retail development in Forster and Tuncurry Town Centres despite being focused on residential and mixed use development.

The town vision for Forster - Tuncurry, stated within the DCP is:

"To retain and enhance the unique natural environmental character and relaxed coastal lifestyle offered by Forster/Tuncurry, whilst embracing high quality development promoting the area as a popular location for residential living, tourism and business".

Great Lakes Council Industrial Development Code

The Industrial Development Code was developed so as to provide a basic framework to assist developers with industrial development submissions. The provisions of the Code are not mandatory and therefore, where it can be demonstrated that a better environment would result, Council can approve a development which is different to the requirements of the Code. The Code provides guidelines on the following elements:

- retailing in industrial areas;
- building setbacks;
- vehicular access;
- parking and loading;
- appearance and general amenity;
- landscaping;
- open storage areas;
- security and fencing;
- advertising signs;
- road services; and
- factory units.

It is important to note that although the Great Lakes LEP 1996 allows for retailing elements in industrial zoned land such as bulky goods, the Code does not allow for retailing which is not ancillary to industrial development and more than 10% of the building's floor space.

5.9 Local Studies

A number of studies and reviews have recently been undertaken on behalf of Council including:

- The Strategic Plan for the Economic Development of the Great Lakes Area 2003;
- The draft Great Lakes Employment Lands Strategy 2006; and
- The Urban Density and Design Review for Forster – Tuncurry and the Tea Gardens Hawks Nest 2008.

The local studies listed above are considered of importance to this Strategy. They have therefore been reviewed in detail and the relevant conclusions, strategies and concepts have been discussed and highlighted where appropriate in this report.

Strategic Plan of the Economic Development of the Great Lakes Area, 2003

The Strategic Plan was developed in response to the need to strengthen the LGA's economic base and to reduce the high level of unemployment. The Strategy sought to address impediments to local economic development and enhance the economic prosperity of the Great Lakes LGA.

Some of the findings of the Strategic Plan were:

- the area has seen major growth in the last 20 years;
- the demographics of the LGA are changing with more retirees moving to the area;
- communication and infrastructure improvements have brought the LGA "closer" to Sydney, Newcastle and Taree;
- technological advances have resulted in many companies and government departments centralising in larger towns and cities, such as Newcastle, Taree and Sydney away from the smaller centres;
- sustainable business and employment growth depends heavily on the capacity of the LGA to tap into regional, state and national chains of economic activity;
- most economic growth in the LGA has occurred through businesses servicing the local population and tourists; and
- the LGA had not been able to attract and retain industry diversification in manufacturing or value added agriculture.

The Strategic Plan sought to provide initiatives focusing on the following areas:

- establish and maintain an organisational and staff framework within Council to facilitate local economic development;
- strengthen the linkages with regional, national and global economies;
- encourage ways to protect and enhance the lifestyle attributes of the Great Lakes LGA;
- implement initiatives to assist in the sustainable development of the LGA's towns and urban settlements;
- market and promote the Great Lakes LGA as a location for business investment;
- develop initiatives to assist the growth of key economic sectors in the LGA, in:
  - productive (on-land) agriculture;
  - fishing and aquaculture;
  - tourism;
  - retailing;

  - education; and
  - health and community services.
- facilitate increased participation in business support programs and initiatives offered by state and commonwealth agencies.

The Strategy also recommended:

- a targeted marketing strategy be developed and implemented, aimed at attracting 'Knowledge Workers' to the Great Lakes area based on the promotion of the area's lifestyle qualities and convenient access to Sydney and surrounding regional centres;
- a comprehensive set of sustainable urban development principles to guide future planning and building activities in Great Lakes LGA be developed;
- the potential of Council owned land to accommodate light industry be explored;
- opportunities to facilitate the development of emerging economic sectors to be explored; and
- the Great Lakes Economic Development Advisory Committee to be formed as a result of the plan.

Draft Great Lakes Employment Lands Strategy, 2006

The draft Employment Lands Strategy 2006 reviewed the supply and demand of employment land within the Great Lakes LGA to accommodate population growth and employment generating activities.

The 2006 draft Strategy aimed to provide Council with a practical and achievable plan of action to facilitate the attraction and expansion of employment generating activities in the Great Lakes LGA.

Some of the key findings of the Strategy included:

- Forster - Tuncurry had the largest population and employment concentration in the LGA;
- Forster – Tuncurry will require more industrial land;
- the principle recent development activity in the LGA has been in residential, retail, retirement and senior living;
- sub–optimal telecommunications provision and the bridge capacity at Forster - Tuncurry have the potential to affect future development patterns and attraction;
- there is scope to consider other employment generating activities which could complement the environmental issues which are a significant asset of the area; and
- Forster - Tuncurry is considered to be a high priority area in the LGA, needing 5ha to 7ha of retail and commercial land and 18 to 24 ha of industrial land.

Urban Density and Design Review for Forster – Tuncurry and Tea Gardens-Hawks Nest (2008)

The Review served as the foundation for the proposed LEP provisions and Town Centre DCPs.

The objectives of the Review include:

- achieving sustainable town centres;
- creating a unique identity;
- creating compact and attractive town centres;
- facilitating access and mobility around and between the towns;
- creating 'liveable towns';
- re-connecting the towns to the foreshore; and
- improving the design quality of new residential and mixed use buildings.

Great Lakes Council Forster-Tuncurry Conservation and Development Strategy, September 2003

The Forster - Tuncurry Conservation and Development Strategy 2003 was developed to ensure a sustainable approach to land use planning and management in order to accommodate the growing population of Forster - Tuncurry. The Strategy was designed to guide land use planning from 2003 to 2023. The aims of the Strategy are to:

- identify and protect significant environmental assets;
- identify land suitable for future urban growth; and
- provide a framework for providing for orderly, efficient and qualitative growth.

The Strategy identified seven potential development precincts which have a high degree of certainty in respect to rezoning, relevant to this strategy three of the seven precincts included:

- Point Road, Tuncurry;
- Pipers Creek, Forster; and
- South Forster.

The Strategy identified a further four potential development sites within the LGA, which would require further investigation, including land at:

- North Tuncurry (Crown Land); and
- Several parcels of land at South Forster.

The Strategy proposed mixed urban development, including some tourist facilities at the 400ha Crown Land site in North Tuncurry. It also proposed that the 17ha Pipers Creek site would include commercial / bulky goods along The Lakes Way with residential and tourism facing the creek.

The Strategy looked in depth at each of the abovementioned potential development sites, describing the location, characteristics, opportunities, ecological and development challenges as well as the desired future character of the area.

The Strategy also discussed background information in a second volume for the Strategy. This information included:

- a community profile;
- environmental and physical characteristics; and
- existing and future infrastructure required.

Volume 2 of the report discussed matters such as the existing bridge constraints and the likely need for duplication at some point in time at a cost of around $20 million.

Great Lakes Council South Forster Structure Plan, February 2006

The Structure Plan was prepared so as to guide future planning and development within the South Forster areas. The Structure Plan provides guidance in relation to:

- the creation of new neighbourhoods that are integrated via roads and pathways, pedestrian and cycleway networks to the broader Forster urban area;
- future housing forms and housing density;
- the range of public and private facilities that should be located in South Forster;
- the integration of new open space areas with the existing open space network;
- the provision of civil infrastructure including stormwater, water supply, sewerage, electricity and telecommunications; and
- the protection and enhancement of the natural and built environment (including ecological, scenic, social and economic issues).

The Plan identified seven distinct precincts and detailed structural information for each precinct, being:

- North of Cape Hawke Drive;
- Lakeside Estate;
- Dunns Creek;
- Follyfoot Farm;
- Pipers Bay South;
- Seven Mile Beach; and
- Cape Hawke / Booti Booti.

The Plan concludes that of the 500ha of undeveloped land in the Plan's Study Area, only 90ha is available for urban purposes. This has the potential to provide 1,700 dwellings, with 5ha of retail, commercial and community facilities.

The rehabilitated section of employment land located off Sweet Pea Road could be subdivided around 2016, dependent on the demand for the land, with the use of the remainder of the site dependent on the sand extraction operations in the area.

6. Trends Affecting Forster - Tuncurry's Economy

A number of local, regional and global trends affect employment generating uses. Particularly their type, location and labour skill requirements, their success and economic viability. The following section analyses these trends at a macro and in some cases a micro level, in order to better understand potential future influences to employment and employment generating uses in Forster - Tuncurry.

6.1 Retail Trends & Key Drivers of Change

The dynamic nature of the retail industry is driven largely by the need to anticipate and effectively respond to consumer behaviour, needs and desires. Changing demographics and lifestyles demand that retailers and shopping centres constantly monitor the often subtle shifts and respond accordingly by repositioning their retail offer, presentation and mode of operation.

Some of the key drivers of change in the nature and form of retailing activity include:

- population and household growth;
- declining average household size;
- an ageing population;
- increasing part time employment;
- longer working hours; and
- increasing workforce participation rate.

The combined impacts of continued population growth and demographic change are now being reflected in a rapid increase in the quantum of retail floorspace, the introduction of new technologies, product designs, more creative retail concepts, strategies, formats and experiences.

The key trends and issues relevant to forecasting retail demand for Forster - Tuncurry are diverse and complex. Broadly they include a deregulation in the hours of shopping, the development of larger supermarkets to operate 24 hours and 7 days a week, the development of out of centre or stand alone retailing complexes, the development of discount department stores (Big W, Kmart, Target), a diversification in the retail experience and the emergence of electronic shopping. These trends and their likely influence to retailing in Forster - Tuncurry are discussed further below.

Deregulation of Shopping Hours

Whilst most forms of retail activity now operate with extended hours, the most significant impact of deregulated shopping hours has been on the trading patterns of supermarkets. Late-night-trading, seven days a week and in some cases 24 hour trading, has largely been a response to the growth in food expenditure captured by convenience stores operating on a 24 hour basis such as 7 Eleven. There has also been a blurring of the hierarchical distinction in function between centres, as supermarkets which trade with extended hours in major centres compete more directly with more traditional local convenience stores.

The physical location of centres is therefore critical in ensuring that the higher order centres (such as the Breese Parade Centre) do not monopolise the market and a place is maintained for easily accessible small local centres or convenience stores within other town centres, villages and small villages such as Manning Street, Tuncurry, Wharf Street, Forster and Forster Keys. The broader spread of shopping hours also appears to be significantly flattening the peaks in trading patterns and may allow for some relaxation in car parking requirements at village or convenience centres.

Supermarkets

Paralleling the deregulation of trading hours has been a trend towards the development of larger supermarkets. While in most cases the impacts can be seen in lower prices and increased product ranges, this trend has placed considerable pressure on the ability of villages and smaller village centres to compete, with impacts often being reflected in a decline in their long term sustainability. Planning policies therefore need to be framed and applied to ensure that supermarkets do not adversely affect competition in village centres and small village centres and to maintain an acceptable level of access for regular food shopping.

A spin-off of the trend towards larger main line supermarkets is an increase in the number of smaller supermarket operators. It is these supermarkets which form the core or anchor for modern village centres.

There has also been a recent trend with the introduction of discount supermarkets such as Aldi and Bi-Lo. These supermarkets have largely been established for more price conscious rather than convenience conscious consumers. These supermarkets have established themselves in all levels of the hierarchy from major regional centres to small village centres, and even outside of town centres (usually on major roads to attract passing trade as well as local trade).

Out of Centre Retailing

A prominent trend to emerge over the past two decades has been the development of out-of-town centres. These are most often characterised by activities which have a primary orientation to bulky goods retailing, activities which require larger floor areas and lower rent structures than those found in traditional centres. Although furnishings, lighting and other home related merchandise has been, and continues to be the primary focus of this form of retailing, the range of activities has become more diversified.

Increasingly they are becoming destination shopping venues, offering a substantial range of merchandise at more competitive prices than can be offered by traditional department, discount department and specialty stores, with resulting impacts on the overall sustainability of traditional centres.

Out of centre retailing has, and continues to have, significant impacts on the structure and dynamics of urban systems. In particular, these are being felt by traditional nodes of retail activity, which are now experiencing a loss in trade. The impacts are being seen in the way in which transport infrastructure is used, with out of town centres most often being removed from public transport infrastructure and dependent on car access. Furthermore Bulky Goods Centres (such as the within cluster Breese Parade) are often located within or close to employment lands and therefore compete for site area with industry and manufacturing. This can be a particular concern where employment lands suitable for industrial uses are limited.

Increased Diversification

Traditionally, retailing has followed a hierarchy from major centres through to town centres, villages and neighbourhood centres. With the introduction of the discount department store in the mid 1960s, a wave of new centre development and expansion was spawned. Since then, ever larger indoor shopping centres have and continue to be developed. Today, centres covering in excess of 70,000sqm of floorspace are commonplace. Stockland Breese Parade is an example of such a centre at over 34,000sqm in floor area with potential interest in future expansion subject to retail demand and planning approval.

Increasingly these newer centres are diversifying the retail experience with the incorporation of food courts, in-centre cinemas, family entertainment centres and larger supermarkets, department stores (David Jones, Myer) and other major tenants. Some are incorporating community facilities such as libraries, child care centres, 'market squares' and community meeting rooms.

These centres are significant destinations for large populations of people. An emerging retail trend for major shopping centres like Stockland Breese Parade will be the extension of the shopping experience to not only include entertainment (cinema and game arcades) but also accommodation (hotel/serviced apartments) and a lifestyle focus including eat streets and street theatre (buskers and public performances).

Convenience Shopping

Another more recent trend to emerge in retailing has been the development of convenience shopping facilities. These are centred on the concept of quick, convenient shopping, meeting the needs of workers travelling home by car and consumers who prefer to spend less time shopping.

One dimension of this trend is a focus on 'convenience community centres', which are usually dominated by a supermarket (to meet daily and weekly shopping needs) and supported by a range of specialty shops such as a butcher, fruit shop, liquor shop, take-away food, video rental and petrol station. These centres are distinguished by a dependence on commuters making their way home and are hence located to enable convenient access and parking.

Another dimension has been the emergence of 'convenience service centres', often centred on petrol stations adjacent to main highways. These offer a range of groceries and fast foods which typically occupy a floor area of around 100 – 300sqm. Rather than being a primary destination for food and grocery shopping they seek to meet the needs of 'just-in-time' impulse shoppers. Often they co-locate with operators such as McDonalds, Burger King and KFC.

In some cases these outlets take the form of 'front of centre/car park' including drive through retailing. The concept is for the car parking to have strong visual exposure to the main road enabling shoppers to clearly see available parking before entering.

Electronic Retailing

Electronic retailing (also called e-tailing and Internet retailing) is a retail format in which the retailer and customer communicate with each other through an interactive electronic network. A growing proportion of Australians have access to the internet at home. The rate of access has quadrupled in recent years, from 16% of households in 1998 to 64% in 2006-07.

In 2006-07, 61% of the 11.3 million people who used the internet at any site reported using it in the past 12 months to buy goods or services for private use. Among all age groups, people aged between 25-34 years were most likely to have used the internet for this purpose (71%)[13]. If this growth continues, electronic retailing is expected to have a major impact on the retail industry, significantly decreasing retail sales in stores.

Electronic retailing is thus generally considered to have substantial growth potential. But this will be dependent on whether or not it can, and is perceived to be able to provide superior benefits over existing retail formats. The critical benefit that electronic retailers can offer is the opportunity for consumers to search across a broad range of alternatives, develop a smaller set of alternatives based on their needs, and get specific information about the alternatives they want.

The type of merchandise sold by electronic retailers depends on delivery costs, the consumers need for immediacy and the degree to which electronic retailers can provide purchase information that helps customers determine whether they will be satisfied with the purchase. It is in this respect that the influence of electronic retailing on the nature and form of retailing should be considered. Significantly, it is giving rise to increased pressure on 'bricks and mortar' retailing activity to seek and adopt new concepts, strategies, formats and experiences. It is also increasing pressure to develop new supply chain networks which enable rapid and efficient movement of goods. This is now evident in the development of large new warehouse distribution centres adjacent to major transport infrastructure.

6.2 The Implications for Retail in Forster - Tuncurry

The trends described above are polarising the retail hierarchy. The larger centres are positioning themselves for a more dominant role in the provision of entertainment and customer services matched with increased retail floor space. For Forster - Tuncurry this can be expected to be reflected in the continued expansion of the Breese Parade Shopping Centre and Manning Mall, Taree. As a result there is considerable expenditure that is not only drawn into Forster - Tuncurry but also expenditure that escapes to large competing centres and their strong retail offer and diversity.

The more successful smaller centres have moved towards a consolidation of their role as convenience centres with greater emphasis on food retailing, just-in-time shopping, fast foods, local services and petrol. In traditional centres pressure is increasing, where opportunities permit, for an expansion of supermarket floor space, in order that a more competitive range of goods can be offered. An excellent example of this is Tuncurry Centre where a larger supermarket is required to meet the demands of the population and support the economic viability of the centre.

[13] Australian Social Trends - ABS 2008

Significant shifts in trade have and continue to occur. In competing for consumer patronage, some centres are succeeding, and some are loosing. Regional Cities, Major Regional Centres and bulky goods premises are expanding and absorbing trade from town centres and even some village centres. Convenience centres located adjacent to major roads are drawing trade from the traditional town centres and village centres that are often a focus for public transport.

An interesting trend that is beginning to emerge in a number of business precincts however is the return to the attraction of shopping in the outdoor environment and therefore the attraction back to traditional retail strips. Traditional centres are becoming 'lifestyle centres' that allow for al fresco dinning, boutique / unique locally owned stores and non franchise stores. This type of retail environment contrasts with the climate controlled major franchise options provided by indoor centres.

Whilst this trend has not yet become apparent in Forster - Tuncurry, the Manning Street, Tuncurry Centre and Wharf Street Centre, Forster in particular have the attributes to capitalise on this emerging change in mentality. The high quality natural environment and coastal settings of the two centres creates attractive settings for meeting and greeting friends for coffee, browsing local artist stalls, farmers markets or enjoying a meal. The implications of these emerging trends to visions and planning controls for the centres will be discussed further in Sections 12 & 13 of this Strategy.

6.3 Commercial Trends

Traditionally commercial office space has been located within centres where it could cluster with a centre's retail, civic and community facilities. Manning Street, Tuncurry and Wharf Street, Forster Centres are examples of traditional urban centres that developed as the main retail and commercial centres for the area.

With the decline of the office market in the 1970's in Australia and changes in business composition and technology, over the last decade and a half there has however been a significant shift in the location of office-based activities. This shift has been towards business park developments and industrial zones.

In Sydney these new centres (known as business parks) have grown along the new motor transport corridors such as the M5 and M7 Motorways. Business parks have become a successful alternative location for commercial and industrial businesses to traditional centres.

Business parks such as Norwest, Australia Centre and North Ryde in Sydney are now recognised as highly successful. Consistent across these parks are the following key characteristics:

- they are predominantly office parks with a component of warehousing, and in some cases a component of research and development and high-technology users;
- apart from providing A-grade commercial space, often with cheaper rent than Sydney CBD, business parks enable purpose designed buildings and plenty of on-site car parking;
- the provision of on-site amenities that attract large corporations, which follows in the footsteps of business park developments in Britain and the USA;

- they hold a sense of prestige, which is a further factor that attracts large corporations. Tenants sign up with a business park for its marketable image. There is a preference for a good clean suburb, which is away from polluting industries. Business parks enable large corporations to custom build their headquarters, providing them with their own stand alone identity, which cannot be achieved in a CBD building of mixed tenants;
- they have lower floorspace ratios, typically 1:1 or lower compared to 2:1 (or higher) in established commercial centres. This allows more cost-effective building construction; and
- they have flexible floor plates and cheaper ground rent, which allows warehousing and office space to be integrated.

6.4 Implications for Commercial Space in Forster - Tuncurry

With the significant growth in population anticipated to occur over the study period and the growth in demand for personal and professional services, it is anticipated that demand for small, professional office suites within Forster - Tuncurry will grow. As discussed in greater detail in later sections of this report, Forster - Tuncurry's place as the prime commercial location within the LGA should be retained and enhanced. Tuncurry and Breese Parade have the potential to play an important role in meeting future commercial office demand.

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 stand alone commercial firms, or clusters of firms (such as a Business Park) in Forster - Tuncurry.

Commercial uses are also located to a small degree within Forster - Tuncurry's industrial precincts, although the vast majority are associated with industrial uses. A commercial office component is necessary for business operation and function although it will be important to ensure that it does not erode the industrial character or potential of the industrial zones. Mechanisms to ensure this erosion does not occur will be discussed further in later sections of the Strategy.

6.5 Industrial Trends

The demand for industrial floorspace is being influenced by trends such as the globalisation of trade and the wider use of information technology. The global economy today consists of sophisticated linkages between businesses, which are designed to enable the efficient sharing of information and the delivery of goods through a global supply chain. This supply chain, once thought of as the flow of goods through production to the end user, can now be seen as an alignment of firms that design, develop, market and produce goods and services, and deliver them to the customer when needed.

An example of this change can be seen in the motor industry. Once concentrated in cities, the industry has evolved into a process where design, manufacture, and assembly occur in many different locations worldwide. Owing to the ability to utilise markets around the world, costs savings may be achieved by transferring the manufacturing of goods to cheaper locations such as China and Indonesia. All this has heightened time based competition and flexibility, with consequential implications for the functional characteristics and spatial disposition of industrial activity.

In response to the changing format of industrial activities and the growth of inner metropolitan land values, there has been a spatial redistribution of more traditional forms of industrial activity. Those activities with lower rent sensitivities have relocated to less expensive land often on the urban periphery. Others have simply stopped operations in Sydney or altogether.

Industrial floorspace used primarily for business related storage is in secular decline, whereas space built for the transferral of goods is increasing. This 'high throughput distribution' space is essentially designed to facilitate the rapid movement of goods through the supply chain. In essence, businesses with low inventory turnover are gravitating to inexpensive land and low cost buildings.

In contrast, businesses that have high inventory turnover and high value products, and typically provide value added functions (including product customisation, packaging, and customs) are more prepared to pay a premium for excellent access to a large customer base and proximity in time and space to roads, ports and airports. These industries would not be suited to Forster - Tuncurry owing to its distance from the Pacific Highway and other major centres in addition to the existing road infrastructure and traffic constraints.

As a result of the industrial trends described above, over the past two decades, the development of industrial land and floorspace in NSW has generally occurred at a rate slower than employment growth. This however, has varied considerably between specific sectors of activity. In manufacturing and wholesale trade, employment growth has with only a few exceptions either declined or remained stagnant. Contrasting this pattern has been the performance of transport and storage, which has shown strong growth.

In essence this economic trend may be summarised by the fact that traditional manufacturing is changing and becoming more efficient in its processes as a result of the use of new technologies and equipment. These greater efficiencies in many cases have not resulted in a decline in output but rather a reduction in the number of staff required. This can be no more clearly reflected in the Hunter Region by the fact that between 1991 and 2002 *"the number of manufacturing establishments trebled, but total employment only increased by 7%. Total wages and salaries increased by a modest 7% and the value of manufacturing income rose by 18% (each valued in current dollars").*[14]

6.6 The New Economy

The New Economy is a term used to describe a knowledge and idea-based economy. In the New Economy the key to higher standards of living and job creation is the incorporation of innovative ideas and technologies in services, products and manufacturing processes. It is characterised by technological innovation, e-commerce, digital transformation, higher education, skills and open trade. It differs from the previous economy where there was less of a reliance on skills and education, technology and innovation and the key driver of economic growth was the mechanisation of the production process.

[14] Hunter Valley Research Foundation – Newcastle and Hunter Region: Manufacturing 2008

Some of the key characteristics of the 'New Economy' as it emerges include:

- higher levels of entrepreneurial dynamism and technological innovation due to increased competition. Such innovation is characterised by research and development, and is the key driver of productivity and ultimately wage growth, which benefits both consumers and the wider community;
- an increase in knowledge based employment that stems from technological innovation, highlighting the need for education and training;
- an improvement in the efficiency of the design and production process, resulting in faster times to the marketplace and to the end-user;
- an increase in diversity in the products and services provided to consumers;
- increased reliance on the internet and other forms of information technology, especially in the service sector. 'Digitisation' (using digital information technologies to produce goods and services) is also a key driver;
- globalisation of the marketplace;
- the restructuring of the hierarchical organisational structures with the emergence of the need for government to co-invest and collaborate with other organisations, so as to achieve a wide range of public policy goals; and
- an increase in the importance of understanding the changing economy.

The goal for growing urban centres, such as Forster - Tuncurry and the wider Great Lakes LGA, will be to foster innovation and adaptation, in order to secure a range of employment options and industry diversity. In many industries, education and training, creativity and adaptation have become the principle sources of competitive advantage. Efforts made by communities to foster the New Economy need to be proactive so as to ensure that the community has access to tertiary education and lifelong learning opportunities. The existing TAFE facility is one such opportunity as well as enhanced links with universities such as the University of Newcastle.

An LGA's economic strategy should grow out of its unique structure, economic assets, limitations and business culture. Therefore, an LGA should develop an in-depth and ongoing understanding of its economy, including how the major economic sectors work and what the LGA's strengths and weaknesses are.

In the New Economy, the public and private sectors must work together. Regional areas should form economic policy councils that bring together key leaders in business, government, labour, civic groups and education, to provide an in-depth analysis of the economy and to develop creative economic strategies, with these strategies ready for adoption.

It is increasingly important in the New Economy that an LGA is attractive to 'knowledge workers', as they are the key driver in the success / failure of implementing the New Economy's principles. There are many factors to contribute to the attractiveness of an area, the most important of which is the quality of life / lifestyle on offer. This is affected by such things as crime, amenities and transportation. Forster - Tuncurry has many lifestyle benefits that could attract knowledge workers including; the natural environment, a proactive Council, industry clusters, affordable housing and an abundance of recreation and leisure pursuits.

It will be imperative however, that Forster - Tuncurry embraces the complementary lifestyle factors sought by today's knowledge workers, including good quality office space, a choice of restaurant and café destinations, a range of entertainment facilities and an attractive night time economy.

6.7 Home Working

The advent of the internet in the late 1970s raised predictions that a greater number of persons would work from home rather than an employer's premises. Despite considerable research attention in the 1980s however, the reality of work from home situations has not expanded hugely since it became a technological possibility with the widespread deployment of internet connections.

The ABS November 2005 Locations of Work Survey suggested that 81% of the 9,401,400 employed persons across Australia worked mainly at business premises in their main job.

The ABS survey also showed that the types of work carried out at home are far more varied than those made possible as a result of using the internet. They range across a very wide array of activities including small scale production (especially garment manufacture) professional services, various service provisions, sales work and various forms of self employment.

While the internet makes work from home practical for many office jobs, the rate of take up of this opportunity across Australia has been tardy. Reasons for this include supervision concerns, social and organisational aspects of the office location, and the importance of physical proximity for effective performance and client contact. Despite this, there appears to be a high level of out of hours work from home using telecommuting technology. Many office workers use their home computers to complete work at home, check emails and communicate with clients in the evenings.

The ABS Method of Transport to Work survey found that 3.9% of Sydney workers worked mainly from home. Within the Great Lakes LGA home working was found to be at a rate of about 6.5% of employed persons. This high rate is likely a reflection of the relative attraction of telecommuting compared to actual commuting between homes in the LGA and centres such as Forster - Tuncurry or external business locations such as Newcastle, Sydney and Port Macquarie. It may also reflect the mature nature / age of residents and their ability to work from home more flexibly either in their semi retirement or part time employment capacities.

Future growth in work from home should consider the various classes of work from home situation. Various creative industries may suit this style of employment including writers, architects and some IT activities. These professions could be expected to be attracted to Forster - Tuncurry due to its lifestyle merits and the growing affluence of its population. This may require encouragement of self-employment and may have complex relationships to property values.

The telecommuting type work at home will very likely grow as confidence and experience in working partly from home expands. This type of working at home has the capacity to soften peak hour transport congestion and possibly have an impact on traffic flow in well know bottlenecks such as the Wallis Lake Bridge as commuters choose to organise the location of their day's work more flexibly.

7. STAKEHOLDER CONSULTATION – SUMMARY OF KEY ISSUES

During the preparation of the Strategy, Hill PDA has consulted with a wide group of stakeholders including:

- Landcom;
- Stockland;
- Woolworths Limited;
- The Mid North Coast Regional Development Board;
- TAFE – Great Lakes Campus; and
- Local landowners.

The consultation process was undertaken in a number of stages including:

- a workshop with local businesses;
- a review of the 'Real Estate Agent Survey' undertaken by Council during the study period;
- workshops with Council's Economic Development Advisory Committee;
- a survey of local businesses and tenants; and
- meetings and telephone discussions with local landowners, stakeholders and major business interests.

The following section of the report summarises and highlights the key issues that were raised during the consultation process.

7.1 Stakeholder Interviews

Some of the key issues, ideas and comments raised during the stakeholder consultation process were as follows:

- Traffic congestion on the Wallis Lake Bridge is a key constraint to development in Forster. In peak periods traffic congestion can restrict trade and service access businesses as well as customers. More development within the Forster area will only exacerbate this issue and create greater safety issues as emergency vehicle access (Fire Brigade, Ambulances, etc) is hindered.
- Many local landowners have a strong interest in developing major sites or part of their major site yet there is significant concern with Council's lack of certainty / clarity as to appropriate use of land and environmental issues to be considered. Other major landowners found Council quite proactive. All respondents agreed that more collaborative working with Council would facilitate greater development opportunities and the realisation of more employment generating uses.

- The quality of retail in Tuncurry is very poor. Owing to constraints on the Wallis Lake Bridge, many of residents in Tuncurry are travelling to Taree to undertake their supermarket and discretionary shopping.
- A good location for additional employment generating development would be Failford Road. This site would allow for large vehicle access that does not disrupt the operation of the town centre.
- A second additional site that was felt to be suited for additional employment generating development was the land to the south-west of The Lakes Way, south of the intersection between Breese Parade and The Lakes Way. The site has been flagged as a possible site for a new shopping centre. Whatever the development, however, the existing environmental issues must be addressed.
- Need to encourage the live local / work local concept to minimise traffic congestion in Forster. Employees should be able to walk or ride a bike to work. Need a local cluster of industries.
- Should retain a focus on smaller, local, boutique businesses.
- The development potential and constraints of the North Tuncurry Crown Land site are currently being investigated. No major financial commitments have been made as yet although subject to all matters being acceptable, Landcom aims to start commitments to developing the site in mid 2009. Some of the key issues to be addressed include coastal morphology, climate change, flooding, Aboriginal land rights and environmental sustainability.
- The North Tuncurry Crown Land site has a wide range of opportunities including retail, accommodation, detached and medium density housing, as well as employment space. Any commercial uses on the site should respect the higher order of the Manning Street, Tuncurry Centre in the Centre Hierarchy.

Demand

- Major retailers consider that the existing supply of supermarket and specialty retail floorspace is meeting current demand. There are opportunities in the short to medium term for an additional Discount Department Store and potentially an additional main line supermarket. Major retailers consider the Breese Parade Centre as an appropriate location for this additional space.
- Major retailers aim to enhance the design quality and civic amenity of the existing indoor centre within the Breese Parade Centre.
- There is insufficient household expenditure / demand for a second Stockland type shopping centre in Tuncurry. The small sites and disjointed ownership also prohibit the development of larger format retailers in the Manning Street, Tuncurry Centre. It is felt that expanding on the existing retail area in Breese Parade is the "safer" option, in comparison to Tuncurry.
- There is demand for 1 – 2 storey good quality light industrial and commercial offices in Forster for small local manufacturers and professionals.
- There is existing market demand for small office units and industrial floorspace in Tuncurry.

Tourism

- Need to broaden the shoulders of the Tourism industry. Need to ensure a longer season through the provision of more tourist activities (restaurants, outdoor activities such as bike paths, trips to the marine reserve and national parks etc). More activity, particularly at night will enhance street security and thereby reduce crime.

- Need to advertise and promote Forster - Tuncurry as a tourist destination to a wider audience.
- Cost of holiday accommodation prohibits a range of lower income families.

Employment

- It is felt in the hospitality industry that some workers have a poor attitude and poor customer service skills, this creates difficulties with staff recruitment.

Education

- Currently, many students move to Newcastle University to study Newcastle University is currently setting up a campus in Port Macquarie.
- The Great Lakes TAFE Campus in Tuncurry had 1,384 enrolled students in 2007.
- A further 400 students who live in Forster - Tuncurry travel to the TAFE Campus in Taree, other campuses near Forster - Tuncurry include those in Port Macquarie and Wauchope.
- The Tuncurry TAFE campus offers courses in the following disciplines:
    - Arts and Media;
    - Business;
    - Community Services and Health;
    - Construction and Transport;
    - Information Technology;
    - Primary Industry and Natural Resources; and
    - Tourism, Hospitality, Retail and Personal Services.
- The population of Forster - Tuncurry is currently growing; The Tuncurry TAFE Campus is expanding in size so as to accommodate this growth.
- The Tuncurry TAFE Campus can expand within its existing land, however, over time the Campus will need to expand outside of this land and it is felt that a portion of the Crown Land to the north will be most ideal.

7.2 Business Workshops

As part of the stakeholder consultation process, Hill PDA coordinated a Stakeholder Workshop with representatives from a variety of different organisations, businesses and departments. The workshop encouraged discussion of future development potential of the Forster - Tuncurry area, potential implications to the operation of business and the provision of appropriately zoned land. The Workshop included representatives from:

- Great Lakes Council;

- MidCoast Water;
- The Chamber of Commerce;
- Help Yourself;
- Forster Private Hospital;
- Stockland;
- The Department of Lands;
- Boatland Marine;
- Rotacaster Wheel Ltd;
- Sails Apartments;
- Gloria Jeans; and
- business representatives from Forster Waterside.

Some of the key issues raised at the Workshop were:

- A more difficult business climate has been experienced (particularly over the last 8 months) because of:
  - rising petrol prices;
  - increasing house prices;
  - the credit crunch;
  - poor weather during the tourist season;
  - people are being more conservative with spending;
  - increase in rent for retail and commercial premises;
  - more vacant shops in centres such as Wharf Street, Forster and Manning Street, Tuncurry;
  - the area lost some tourist attractions which helped attract tourists to the area; and
  - Tuncurry road works recently closed Manning Street for 6 weeks, to the detriment of businesses.
- Recent positives have included good sales of apartments and good occupancy of the caravan parks;
- Most of the people moving to the area are from Sydney and the Hunter Region, this hasn't changed much over the years;
- The Chamber of Commerce has 140 financial members and 6 committee members;
- Currently Forster Private Hospital:
  - Is empty on the first floor and therefore not at full capacity;
  - Finds if hard to attract specialists as they don't want to leave the cities, it is not so much a housing stock problem;
  - Has no academic postings locally;
  - Finds it difficult to identify appropriate jobs for the specialist's partners;

- It is difficult to attract or retain the younger generations (eg. 20 - 30 year olds). This is occurring for such reasons as there is no night life. There needs to be more reasons to stay, maybe rewards or more coordination with the TAFE;
- It is difficult for people in the area to get jobs if they have no skills;
- When people have the skills, the money is not always there to pay the appropriate wage;
- Other issues for the area include:
  - cost of living, housing is expensive and limited;
  - seasonal work;
  - staff demand can more than double at Christmas time, (eg one business during Christmas has 15 staff, yet in July they only have 3 staff);
  - staff must be trained before the peak season;
  - hard to attract big companies;
  - no decent size industrial lands;
  - land availability is a problem;
  - limited amount of out of town industrial land;
  - existing industrial units in Forster - Tuncurry are too small;
  - car parking spaces within the main precincts are a problem;
  - airport is not close like Coffs Harbour; and
  - during times of poor economy, builders often leave the area;
- An old mine which is located on Crown Land may be suitable as a new industrial area. The site is located on Ton O'Fun Road, with some basic infrastructure such as electricity. Environmental and native claim issues that must be addressed, and therefore the redevelopment of the site may not be possible;
- What is the vision for the town? A tourist town? A liveable town?
- Coffs Harbour has a declining tourist industry and is increasing in residential. Is this a direction which Forster - Tuncurry will take?
- Events currently located in Forster - Tuncurry include surfing and lawn bowling events, new events include an adventure race;
- Some of the strengths of Forster - Tuncurry include:
  - safe environment for families;
  - the area is isolated away from the Highway (although is also seen as a problem for industrial);
  - the natural environment and location of the area; and
  - the lifestyle, located next to the beaches, the lake and the national parks, the area has a lot to offer.

- Things which could be done to improve Forster - Tuncurry include:
  - promote the safe environment for families;
  - promote sustainability;
  - need higher level of trained nurses;
  - gentrify the public places, such as the village centres and make the places more appealing;
  - landscape public places to make them more appealing;
  - provide other entertainment, so as to accommodate younger and older generations of the local population and tourists;
  - provide more social infrastructure to make the area more appealing for those who live in the area and the tourists;
  - promote the area as market town during shoulder seasons; and
  - look outside the box – not follow others.

7.3 Business Survey – Summary of Findings

One component of the study's stakeholder consultation process related to the survey of businesses within Forster - Tuncurry. In order to consult with this key stakeholder group, a business survey with 35 questions was developed in consultation with Great Lakes Council. The survey asked a range of questions, which were divided into five sections which were:

- business details;
- employment information;
- communications;
- plans for business; and
- general comments.

Questions asked included:

- How long has this business been operating in the current location?
- How many workers do you currently employ?
- Does your business have internet access?
- Do you have plans to expand your business? and
- In your opinion, what are the three best things about doing business in this area?

The surveys were hand delivered to businesses including those located within Manning Street, Tuncurry and Wharf Street, Forster, Forster Keys, also premises along Point Road, premises within Forster Industrial Area, Tuncurry Industrial Area, the Medical Precinct and around the Cape Hawke Community Private Hospital.

Approximately 115 surveys were distributed. A total of 26 surveys were completed and returned representing a 23% response rate. This rate of response is greater than the average response rate for surveys of this nature and is therefore considered a fair representation of local business attitudes.

Of the businesses which replied the majority were retail orientated, 3 were industrial and 9 were commercial.

The key findings of the business survey have been summarised below by section:

Business Details

- Over 80% of the premises were originally established in Forster - Tuncurry and over 50% of the premises surveyed have been in Forster - Tuncurry for over 10 years;
- On average, across the surveyed businesses, over 85% of products were sold locally; over 10% were sold in NSW, less than 3% in other parts of Australia. Only one business said they sold internationally and that was only 1% of their business; and
- More than 6 respondents cited the "adequacy of the highway / roads", "public parking" and "availability of appropriately zoned land" as having a "poor" impact on their business. This was often reiterated in words under "Specific Problems", together with poor water quality and transport problems.

***"There is insufficient land for office purposes which causes rents and prices to be higher than they should be."* Business Owner**

Employment

- 24 of the 26 respondents employed workers, with an average of more than 4 permanent workers, 1 permanent part-time worker and 4 casual workers. Approximately the same number of respondents stated they had employed more staff in the last 2 years, as those who had employed less;
- 50% of businesses expected the number of employees to increase in the next 2 years;
- 30% of businesses were experiencing difficulties in finding suitable employees;
- Over half of the businesses cited the high costs of training employees and skilled employees being reluctant to move to the area as problems they have faced when trying to recruit new employees. 25% of businesses also experienced problems with low employee skill levels, poor work attitude and high wage rates for skilled employees;
- Over 20% of businesses found it difficult to retain employees;
- Over 30% of the businesses surveyed currently employ trainees and/or apprentices, a further 20% of businesses were interested in employing trainees and/or apprentices; and
- Over 25% of businesses received assistance from various sources to address any recruitment or staff training needs.

Communications

- Almost 90% of businesses surveyed had internet access, over 70% of the businesses surveyed relied on internet access;
- The main type of internet access used by the businesses was ADSL (70%); and
- Almost 70% of businesses were happy with their internet speed.

Business Expansion

- 50% of businesses surveyed are looking to expand their business, over 60% of these businesses were looking to undertake their expansion in the next 2 years, only 3 of the businesses said that their expansion would not require additional floor space or property within the Forster - Tuncurry area;

Relating to difficulties:

"rental costs, finding skilled managers to operate business, difficulty in maintaining a workforce in our company across quieter periods of winter." Business Owner

- A further 20% of businesses surveyed were not sure in regard to expansion; and
- Factors effecting the expansion of land included the cost of land and construction, the time involved with expanding and lack of suitable land.

General Comments

- The most common responses as to the best things about doing business in Forster - Tuncurry included:
  1. lifestyle;
  2. great area;
  3. the local community;
  4. providing a valuable service to the local community;
  5. tourist dollar;
  6. the opportunity and potential of the place; and
  7. cheaper land.
- The most common responses as to the key constraints when doing business in Forster - Tuncurry included:
  1. difficult to find suitable staff;
  2. seasonal markets;
  3. infrastructure;
  4. localised market;
  5. difficult to find suitable premises;
  6. competition from new shopping centre on other centres;
  7. parking; and
  8. overheads.

- The most common responses as to the opportunities for Forster - Tuncurry to make the local economy stronger and create more jobs included:
    1. improve winter months, improve promotion;
    2. focus on improving industries other than tourism (diversify, more industry, etc);
    3. release more land;
    4. increase population;
    5. upgrade infrastructure (eg highway, marina, etc); and
    6. more opportunities for the young.

"We need more of something (???) to attract people to our area to create jobs. I see this town predominantly as a "lifestyle living" area. If we can attract more people here the jobs will follow!!!! Release more land perhaps...?." Business Owner

- It was felt that Council could provide better support to local businesses by enhancing the promotion of tourism, improving infrastructure, improving the administrative process and focussing on the redevelopment of the existing centres.
- There were a few businesses which felt that the existing services and businesses in Forster - Tuncurry were sufficient, however, others felt that more tourism related activities, industries, government departments, fruit and vegetable processing, an airport, or more restaurants were required.
- The two main ways businesses worked together was through cooperative marketing and referral of work.

"I have been in business in the area for over 25 years. People come to Forster on holidays because they want the lakes, ocean and sandy beaches and affordable accommodation (not any more). In my business I get to meet a lot of people, they say accommodation is expensive. Nothing much for young people to do, only clubs and pubs (people are holidaying else where)" Business Owner

- Over 25% of businesses surveyed benefited from some sort of government support program such as trainee grants.

7.4 Real Estate Agent Survey – Summary of Findings

As part of the stakeholder consultation for the Strategy, Great Lakes Council consulted with four Real Estate Agents who operate in the Forster - Tuncurry area. The Real Estate Agents were asked a number of questions resulting in the following findings:

- Most real estate agents had experienced a number of enquires relating to commercial / office space in the previous month, with floor area requests ranging from 100sqm to 1,000sqm;
- Most retail enquiries were for floor areas ranging from 40sqm to 100sqm, particularly along Wharf Street, Forster;
- Many of the enquiries were from locals;

- Positions of high roadside visibility were also favoured for retail and commercial premises;

- Generally, agents struggled to satisfy many enquiries due to the limited amount of suitable buildings and/or land which is appropriately zoned for commercial, retail, bulky goods and industrial purposes;

- The number of enquires taken by real estate agents over the previous 12 months had been mixed, with some agents taking more and others less. Where the number of enquiries had increased, it was generally felt that this was due to more people wanting to move into the area. Where the number of enquires had reduced for retail premises, it was felt that this was due to the oversupply as a result of the recent upgrade to, and expansion of, the Stockland Shopping Centre. Where the number of enquires had reduced for commercial premises, it was felt that this was due to the lack of supply and high rents;

- It was generally felt that for many of the industrial, commercial, bulky goods and retail premises to sell, their prices needed to be reduced;

- Many of the agents knew of new commercial and retail developments about to come onto the market. All of the developments mentioned were located on the Forster side of the Wallis Lake Bridge; and

- One of the Real Estate Agencies concluded by stating that they "wished there was" generally more zoned land for commercial, retail, industrial and bulky goods properties in the Forster - Tuncurry area. This reflects the undersupply of such uses in the area and the reasons for why the Real Estate Agencies could generally not satisfy the recent inquiries for their clients.

7.5 Advisory Committee – Summary of Findings

Hill PDA met with the Great Lakes Economic Development Advisory Committee twice throughout the study period. The Economic Development Advisory Committee was formed in 2003 by Council to provide advice on Councils role in supporting economic and employment growth in Great Lakes LGA. The Committee is made up of 12 members, including the Mayor, General Manager and Economic Development Manager as well as representatives from local business and industry sectors. The Committee discusses matters relating to the Great Lakes Economy and focuses on setting the strategic direction for economic development of the Great Lakes LGA, facilitating the growth of existing Great Lakes industries, identifying new and emerging business opportunities and facilitating their development (Great Lakes Council website, 2008).

During the meetings with the Economic Development Advisory Committee, the following key issues were discussed:

- What opportunities are there for sustainable employment generating developments? Could development benefit from carbon credits? Is a wind farm an option in the area for sustainable development?

- What opportunities are there to work with universities with such developments as eco parks?

- Are new events for the area needed to stimulate the economy, particularly during the low season? What facilities would be needed? Is there a danger of the population becoming too exhausted from too many events, particularly the volunteers?

- How is the population of Forster - Tuncurry changing and how will this affect the economy?
- Will petrol prices adversely impact on the economy, particularly the tourist elements? Will petrol prices stop people visiting the area? Is the proximity of Forster - Tuncurry to Sydney and Newcastle a positive in comparison to places such as Port Macquarie which is further away?
- What is the image of retail space in the area? (Eg. Wharf Street, Forster or Stockland, Breese Parade);
- Unique businesses and their importance for the area;
- Are more markets needed?
- What sort of social infrastructure should be implemented?
- Is bulky goods retailing positive or negative for the area?
- Would tourism benefit from a better located, more attractive bus terminal?
- Advertise the area as bike friendly to tourists. One option would be to collaborate with the Country Link rail service and encourage tourists to come to the area with their bikes on the train; and
- So as to beautify Wharf Street, Forster one option may be to implement a tariff on businesses which would provide funds for the beautification of the area.

8. Existing Supply Analysis

In order to inform the strategy, a survey was undertaken of the centres and key employment lands within Forster - Tuncurry. The surveys calculated the number and type of retail, commercial and industrial premises within the Study Area, together with an approximation of floorspace and site area where appropriate.

For the purposes of recording, retail premises were organised into the following categories:

- Supermarket & Grocery (Woolworths, Coles, etc);
- Specialty Food (butcher, baker, etc);
- Catered Food (restaurants, cafes, take-a-way shops, etc);
- Department Store (Big W, K-mart, etc);
- Apparel (Best & Less, clothing stores, shoes, etc);
- Bulky Goods (furniture stores, Harvey Norman, Sleep City, etc);
- Other Non-Food Retail (newsagent, pharmacy, etc); and
- Personal Services (hairdressers, chiropractor, video hire, etc).

Other types of premises (not including industrial) were organised into the following groups:

- Marine shed Related (i.e. Boat Sheds);
- Vacant (premises which were vacant at the time of survey);
- Other Commercial (real estate agents, accountants, doctors, etc);
- Auto Related Businesses (car sales, auto repair, petrol station, etc); and
- Other Pubs/Clubs.

8.1 Existing Supply in Forster - Tuncurry's Centres

There are 12 existing retail / employment centres within the Forster - Tuncurry study area together with some dispersed retail / commercial premises. The tables below show the number of retail and commercial establishments by broad store type and anchor tenants located in each.

The Forster - Tuncurry Study Area presently provides in the order of 68,750sqm of occupied retail floorspace. The tables below also show that the Forster – Tuncurry Study Area provides a total of:

- 19,510sqm of commercial floorspace;
- 4,380sqm of vacant floorspace; and
- 18,110sqm of bulky goods floorspace.

Table 25 - Breakdown of Floorspace and Type of Premises for Forster - Tuncurry

Category	Floorspace (sqm)	Number of Premises
Supermarket & Grocery Store	12,000	8
Specialty Food	3,460	23
Catered Food	8,050	57
Department Store	7,340	2
Apparel	5,520	39
Bulky Goods	18,110	19
Other Non-Food Retail	9,900	70
Personal Services	4,370	40
Total Retail	68,750	258
Vacant	4,380	36
Total Shopfront	73,130	294
Boat Shed Related	980	6
Other Commercial	19,510	110
Auto Related Businesses	1,930	9
Other Pubs/Clubs etc	2,890	3
Total	**98,440**	**422**

Table 26 - Floorspace by Category by Centre (sqm)

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services	Total Retail	Vacant	Total Shopfront	Boat Shed Related	Other Commercial	Auto Related Businesses	Other Pubs / Clubs etc	Total
Wharf Street, Forster	50	340	4,210	0	2,120	90	2,030	1,200	10,040	2,110	12,150	0	5,870	120	1,990	20,130
Breese Parade Centre	9,730	620	2,500	7,340	3,250	17,450	4,160	1,730	46,780	0	46,780	0	7,180	780	200	54,940
Fairways	130	60	60	0	0	0	60	60	370	0	370	0	110	0	0	480
Forster Keys	0	380	0	0	0	0	60	210	650	0	650	0	0	0	0	650
Forster - Lake Street	0	280	0	0	0	360	0	0	640	0	640	0	0	0	0	640
Forster - Breckenridge Channel	0	0	230	0	0	0	0	0	230	0	230	710	0	0	0	940
TOTAL _ Forster	9,910	1,680	7,000	7,340	5,370	17,900	6,310	3,200	58,710	2,110	60,820	710	13,160	900	2,190	77,780
Manning Street, Tuncurry	2,090	1,780	1,050	0	150	210	3,590	1,170	10,040	2,060	12,100	0	6,350	1,030	700	20,180
Tuncurry - Peripheral	0	0	0	0	0	0	0	0	0	210	210	270	0	0	0	480
TOTAL - Tuncurry	2,090	1,780	1,050	0	150	210	3,590	1,170	10,040	2,270	12,310	270	6,350	1,030	700	20,660
TOTAL -Forster/Tuncurry	**12,000**	**3,460**	**8,050**	**7,340**	**5,520**	**18,110**	**9,900**	**4,370**	**68,750**	**4,380**	**73,130**	**980**	**19,510**	**1,930**	**2,890**	**98,440**

Source: Hill PDA Survey / Stockland / Property Council of Australia

Table 27 - Number of Premises by Category by Centre

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services	Total Retail	Vacant	Total Shopfront	Boat Shed Related	Other Commercial	Auto Related Businesses	Other Pubs / Clubs etc	Total
Wharf Street, Forster	1	3	32	0	20	1	17	17	91	21	112	0	45	1	1	159
Breese Parade Centre	3	4	14	2	18	15	21	7	84	0	84	0	19	4	1	108
Fairways	1	1	1	0	0	0	1	1	5	0	5	0	1	0	0	6
Forster Keys	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Forster - Lake Street	0	1	0	0	0	1	0	0	2	0	2	0	0	0	0	2
Forster - Breckenridge Channel	0	3	31	0	20	1	16	15	86	21	107	0	44	1	1	153
TOTAL _ Forster	5	12	48	2	38	17	40	27	189	21	210	5	65	5	2	287
Manning Street, Tuncurry	3	11	9	0	1	2	30	13	69	14	83	0	45	4	1	133
Tuncurry - Peripheral	0	0	0	0	0	0	0	0	0	1	1	1	0	0	0	2
TOTAL - Tuncurry	3	11	9	0	1	2	30	13	69	15	84	1	45	4	1	135
TOTAL -Forster/Tuncurry	**8**	**23**	**57**	**2**	**39**	**19**	**70**	**40**	**258**	**36**	**294**	**6**	**110**	**9**	**3**	**422**

Source: Hill PDA Survey / Stockland / Property Council of Australia

8.2 Existing Centres in Forster -Tuncurry

Breese Parade Centre

Location

The Breese Parade Centre is located approximately 4km south-east of the Wallis Lake Bridge by road. Breese Parade transects the centre from the south-west to the north-east. A Shopping complex is located in the middle of the centre, next to a stand alone Woolworths on the north western side of Breese Parade. To the east of the shopping complex is a cluster of bulky goods premises.

The Great Lakes Council building is located on the south-eastern side of Breese Parade, together with other civic buildings including a library. At the south-western end of Breese Parade, east of the intersection with The Lakes Way, are some additional bulky goods premises.

Figure 6 - Plan of Breese Parade Centre as Zoned 3(a) and 5(a) by the Great Lakes LEP 1996

Source: Red Square

Role and Function

The Breese Parade Centre is the principle retail and commercial focus for the Great Lakes LGA (draft GLELS 2006). The existing retail, commercial and civic elements of the centre provide for the wider retail and civic needs of not only Forster but also Tuncurry and the greater LGA. A number of community facilities are also located within the Centre, these include the Forster Library, an Arts and Craft Centre and a Community Centre.

Commercial and Retail Mix

The Breese Parade Centre comprises of a large Stockland owned Shopping Centre, a stand alone neighbouring Woolworths supermarket, a civic centre including Council Chambers and two bulky goods retailing clusters.

The Stockland Shopping Centre comprises of 82 premises 67 which are retail. Some of the longer anchors include Coles (4,083sqm), a Kmart (5,838sqm), Target Country (1,500sqm), Aldi (1,428sqm) and a Bunnings Warehouse (8,008sqm). In November 2007 an extension to the shopping centre was completed. The Target Country, Aldi, Bunnings Warehouse, and over 45 specialty stores were included within this expansion, together with approximately 860 car parking spaces.

The neighbouring Woolworths supermarket is in separate ownership to the Stockland Shopping Centre and has a floor area of 4,220sqm.

To the north-east of the shopping centre is the Forster Industrial Area, which includes a number of retail premises, 10 of those being bulky goods and lifestyle premises. They include a Retravision (427sqm), Harvey Norman Furniture (1,390sqm), Barbeques Galore (531 sqm) and Sweat Shed Gym (797sqm).

To the south-west of the intersection of Breese Parade and The Lakes Way is a bulky goods store (Brian's Homemakers 1,716sqm), KFC and Mid Coast Ford.

On the south-eastern side of Breese Parade is the Great Lakes Council building and a number of other civic buildings.

Table 28 - Establishments and Floorspace by Category in Breese Parade Centre

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	3	4	14	2	18	15	21	7
Floorspace (sqm)	9,730	620	2,500	7,340	3,250	17,450	4,160	1,730
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	84	0	84	0	19	4	1	108
Floorspace (sqm)	46,780	0	46,780	0	7,180	780	200	54,940

Source: Hill PDA Survey / Stockland / Property Council of Australia

Planning Controls

Under the Great Lakes Local Environmental Plan 1996, the following zoning applies:

- Stockland and Woolworths Land: 3(a) General Business Zone;
- Civic Buildings Area: 5(a) Civic Centre;

Performance

Currently there are no vacancies in the shopping centre suggesting the centre is performing very well.

Consultation with Stockland also indicated that the shopping centre is trading well. As with most retail establishments in the Forster - Tuncurry area, the shopping centre experiences more trade during the summer tourist season particularly during December and January. Stockland have advised that during these months turnover can increase by two to three times.

Issues and Challenges

According to the draft GLELS (2006), the Breese Parade Centre is constrained for car parking and has poor transport links to the hinterland. The extension of the centre and its associated car parking since the preparation of the report in 2006 is believed to have addressed some of these immediate issues.

Forster is accessible from both the north and the south, linking in both cases to the Pacific Highway. The road network connecting Forster to the Pacific Highway in the north is by far the better quality and provides a more direct link of the two connections, however, it is constrained by the capacity of the two lane bridge crossing Wallis Lake. The bridge often experiences congestion, particularly during the tourist season, when the population of the town increases dramatically.

To the south, the existing road network is hilly and winds around Wallis Lake and Myall Lake, stretching over 50km to the Pacific Highway. The road is more of a scenic drive than a major transport link. As a result, the centre experiences access constraints which have the potential to impact on the future development of the area.

The indoor shopping centre is owned and operated by Stockland who lease units within the centre to individual retailers. As result of the single ownership, the coordination of strategies, such as maintenance and branding for the Centre are made easier as retailers are bound by their lease agreements and pay a special levy contribution.

Wharf Street, Forster

Location

The village is located to the immediate east of the Wallis Lake Bridge and 18km south of the Pacific Highway by road. As the name indicates, the village is focused around Wharf Street, with many shopfront premises fronting the one way street. Retail and commercial development extends beyond Wharf Street, including Beach Street, Head Street, Wallis Street, Little Street and Memorial Drive (down near the waters edge). The area is bounded by Breckenridge Channel (Wallis Lake) to the south-west, residential and open space to the north and residential to the east.

Originally, Wharf Street, Forster was the principle retail and business centre for Forster (draft GLELS 2006).

Figure 7 - Plan of Wharf Street, Forster Centre as Zoned 3(a) by the Great Lakes LEP 1996

Source: Red Square

<u>Role and Function</u>

Wharf Street, Forster comprises of a mix of retail and commercial premises which provide for both the day to day needs of Forster - Tuncurry and the greater LGA. The centre also accommodates for the needs of the visitors to the area. The village comprises of a greater number of commercial premises than the Breese Parade Centre, however, these tend to have a smaller floor area. The area still retains some of its traditional primary retail / commercial centre focus and plays an important role as a boutique shopping destination for the local tourist industry.

<u>Commercial and Retail Mix</u>

Wharf Street, Forster Village comprises of 159 premises, including 91 retail premises and 45 commercial premises.

Table 29 - Establishments and Floorspace by Category in Wharf Street, Forster Village

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	1	3	32	0	20	1	17	17
Floorspace (sqm)	50	340	4,210	0	2,120	90	2,030	1,200
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	91	21	112	0	45	1	1	159
Floorspace (sqm)	10,040	2,110	12,150	0	5,870	120	1,990	20,130

Source: Hill PDA Survey

Planning Controls

Under the Great Lakes Local Environmental Plan 1996, the land is zoned primarily as 3(a) General Business Zone, with some land designated 6(a) Open Space and Recreation, some land designated 5(a) Special Uses Zone in the south and some interspersed retail / commercial development located in the surrounding 2(c) High Density Residential Zone.

Performance

At the time of the Hill PDA survey, there was a 17% shop front vacancy rate. This suggests that the village is experiencing economic challenges.

Further to these findings, Hill PDA has been informed through consultation with the Council that since the retail survey was undertaken, the vacancy rate appears to have increased along Wharf Street.

Issues and Challenges

The centre experiences a number of challenges, including restricted car parking capacity, restricted expansion capabilities (due to the close proximity of higher density residential units and tourist accommodation), lack of office space[15], multiple land owners and seasonal tourist trade.

Although the village is restricted due to the surrounding residential and tourist accommodation, the centre has the capability to increase FSR provisions. This has been demonstrated by the Urban Design and Density Review, Explanation of Proposed Changes to Height and FSR, dated September 2007. These changes have been incorporated into DCP 51 Forster / Tuncurry Town Centres and were adopted in July 2008.

One of the main bodies who represent the many different businesses and owners within the centre is 'Forster Waterside'. In comparison to shopping centres where there is one sole owner of the site, multiple owners can

[15] Urban Design and Density Review (2008)

make the organisation of projects (such as advertising and marketing) more of a challenge. It is important that when undertaking improvements to the village, they should be done in close consultation with organisations, such as Forster Waterside, so as to improve the overall outcome and efficiency. The Urban Design and Density Review (2008) recommends as a future action, the establishment of Main Street Committees. One option would be to strengthen as Forster Waterside to achieve this. We understand that Forster Waterside have commenced working with the Council and Department of State and Regional Development to secure funds for a marketing and promotions officer for the centre. This initiative will be discussed in greater detail in Section 12.

The seasonal tourist trade is a major issue for many businesses within the Forster - Tuncurry area. With such a dramatic change in the population during the tourist months, a range of problems are experienced throughout the year. Many businesses rely on the strong trade during the tourist season. With the increase in trade, problems such as employee shortages are not uncommon. Further to this, with such a reliance on the tourist season, a bad tourist season can severely impact the financial security of a business for the remaining year. This issue is experienced by many businesses in the Forster - Tuncurry area, particularly in Wharf Street, Forster given its dependence on tourist trade and proximity to a large proportion of the tourist accommodation in the Study Area.

The village is located on the bank of Wallis Lake, an important natural resource which could be utilised as a way to improve the visual amenity of the village. Incorporating this natural feature into future urban design improvements should be encouraged. Views to the beach from the centre are restricted however as a result of the areas topography. Another important consideration will be to ensure that any potential tall buildings surrounding the centre do not adversely affect its amenity by way of overshadowing or through the formation of a monotonous skyline[16].

A major component of the vision for Forster - Tuncurry is the retention and enhancement of the unique natural environment. Future developments in the centre should be of a design that is in keeping with the centre's vision.

[16] Urban Design and Density Review (2008)

Manning Street, Tuncurry

Location

The existing village centre in Manning Street Tuncurry is located to the immediate north-west of the Wallis Lake Bridge and 16km south of the Pacific Highway by road. The village is focused around Manning Street, Tuncurry predominantly between Lake Street to the north and Catherine Street to the South.

Retail and commercial developments extend approximately 700m from the waters edge, to the north-west along Manning Street. There are also a small number of retail and commercial premises located on streets other than Manning, such as South Street, Rockpool Road and Beach Street.

The main portion of land surrounding the village is zoned 2(b) Medium Density Residential Zone in the north, east and west, with some open space, 2(c) High Density Residential Zone and 2(a) Low Density Residential Zone to the south.

Figure 8 - Plan of the Manning Street, Tuncurry Centre as Zoned 3(a) by the Great Lakes LEP 1996

Source: Red Square

Hill PDA

Role and Function

The Manning Street, Tuncurry Village Centre comprises of a mix of retail and commercial premises which provide for the grocery and personal service needs of local residents located to the north of the Wallis Lake Bridge in addition to the needs of visitors to the area.

The village comprises of a similar number of commercial premises to Wharf Street, Forster and serves a similar role in respect to its commercial provision. Manning Street, Tuncurry differs from Wharf Street, Forster however, as Manning Street is the main access road for the Study Area, used by a comparatively large volume of traffic. The centre has not developed in the same fashion as the Wharf Street, Forster Village which is not a major thoroughfare but a one-way access, with a streetscape design that is more conducive to pedestrians and tourists.

Manning Street, Tuncurry is not capable of catering for pedestrians to the same degree as Wharf Street, Forster and as a result has not developed in the same fashion. The village has less than a third of the number of restaurants and other catered food establishments than Wharf Street, Forster. Generally the village caters for the needs of residents to the north of the Wallis Lake Bridge, together with tourists staying in close proximity.

Commercial and Retail Mix

Tuncurry Village comprises of 133 premises, including 69 retail premises and 45 commercial premises. The Village provides one supermarket being the Bi-Lo (1,780sqm) and 2 smaller grocery stores.

Table 30 - Establishments and Floorspace by Category in Tuncurry Village

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	3	11	9	0	1	2	30	13
Floorspace (sqm)	2,090	1,780	1,050	0	150	210	3,590	1,170
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	69	14	83	0	45	4	1	133
Floorspace (sqm)	10,040	2,060	12,100	0	6,350	1,030	700	20,180

Source: Hill PDA Survey

Planning Controls

Under the current Great Lakes Local Environmental Plan 1996, the land is zoned primarily as 3(a) General Business Zone.

Performance

At the time of the Hill PDA survey, there was a 17% shop front vacancy rate. This suggests that the village is experiencing challenges. Our stakeholder consultation has however identified that the Bi Lo is trading strongly.

Further to these findings, Hill PDA has been informed through consultation with the Council that since the retail survey was undertaken in August 2008, the number of street level vacancies in the centre has increased.

Issues and Challenges

The centre experiences a number of challenges including, restricted expansion capabilities due to the close proximity of medium density residential and tourist accommodation, lack of office space[17], multiple land owners and seasonal tourist trade.

Although the village is restricted due to the surrounding residential and tourist accommodation, the area does have the capability to increase building densities. This has been demonstrated by the report titled 'Urban Design and Density Review, Explanation of Proposed Changes to Height and FSR' dated September 2007. These changes have been incorporated into DCP51 Forster / Tuncurry Town Centres adopted in July 2008.

One of the main bodies who represent the many different businesses and owners within the centre is the Chamber of Commerce. In comparison to shopping centres where there is one sole owner of the site, multiple owners can make the organisation of projects (such as advertising and marketing) more of a challenge. It is important that when undertaking improvements to the area, they should be done in close consultation with organisations, such as the Chambers of Commerce, so as to improve the overall outcome through joint working and efficiency.

The volume of traffic using Manning Street, Tuncurry reduces the visual appeal of the area in comparison to the pedestrian friendly Wharf Street, Forster. It is unlikely that the volume of traffic will be reduced in the foreseeable future. This represents one challenge for the centre and its competitiveness with Wharf Street, Forster and the Breese Parade Town Centre.

The seasonal tourist trade exacerbates difficulties relating to employee shortages in the peak seasons and difficulties relating to finances during the low season. The difficulties relating to the seasonal tourist trade are however experienced throughout the Forster - Tuncurry area.

The southern end of the village is located on the bank of the inlet to Wallis Lake, an important natural resource which could be utilised as a way to improve the visual amenity of the village. Currently accessibility and visibility to the water's edge is limited. Incorporating this natural feature into future urban design improvements should be encouraged.

[17] Urban Design and Density Review (2008)

<u>Fairways Small Village</u>

<u>Location</u>

The small village is located approximately 3km (by road) east of the Wallis Lake Bridge. The small village comprises of a cluster of shop front premises. The majority of premises front Boundary Road which runs north to south.

Figure 9 - Plan of Fairways Small Village as Zoned 3(a) by the Great Lakes LEP 1996

Source: Red Square

<u>Role and Function</u>

The small village provides for the day to day convenience needs of the local community.

<u>Commercial and Retail Mix</u>

The cluster contains a total of 6 shopfront premises including a Fairways Minimart (130sqm) and 4 other retail premises, including a newsagency, butcher and a hairdresser.

Table 31 - Establishments and Floorspace by Category in Fairways Small Village

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	1	1	1	0	0	0	1	1
Floorspace (sqm)	130	60	60	0	0	0	60	60
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	5	0	5	0	1	0	0	6
Floorspace (sqm)	370	0	370	0	110	0	0	480

Source: Hill PDA Survey

Planning Controls

Under the Great Lakes Local Environmental Plan 1996, the land is zoned 3(a) General Business Zone.

Performance

The village appears to be performing well, with no vacancies.

Issues and Challenges

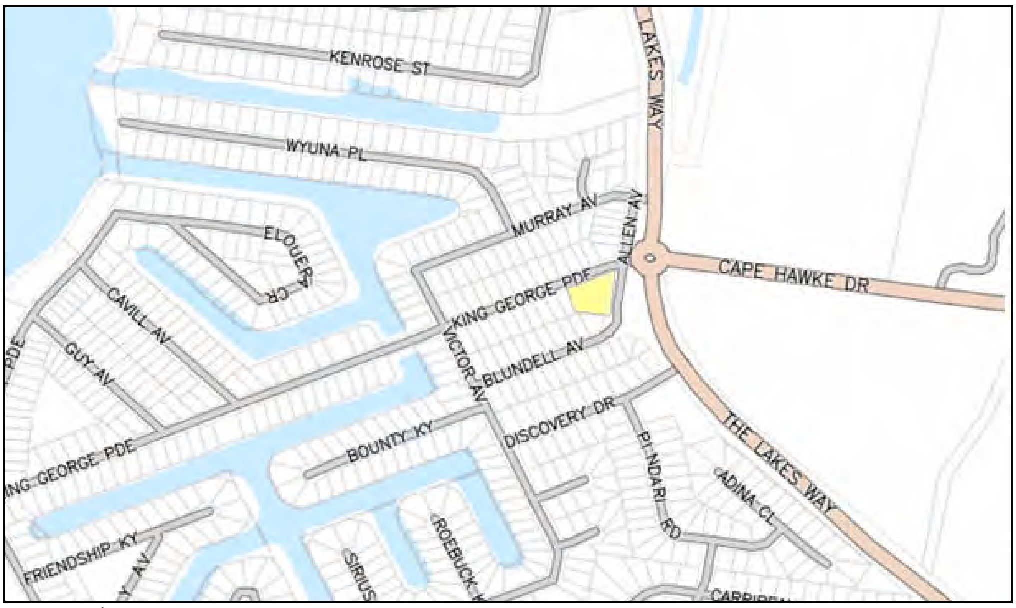
The trade area of Forster Fairways encompasses the local residential areas surrounding the small village. The Wharf Street, Forster and Breese Parade Centres are located in close proximity to the small village. The small village is therefore heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location for small daily retail needs.

Forster Keys

Location

The small village is located approximately 5.5km south of the Wallis Lake Bridge, by road. The village is a cluster of retail premises and associated car parking. The cluster is located on the corner of King George Parade and Allen Avenue.

Figure 10 - Plan of Forster Keys Small Village as Zoned 3(a) by the Great Lakes LEP 1996



Source: Red Square

Role and Function

The small village provides for the day to day retail needs of the local community.

Commercial and Retail Mix

The cluster contains a total of 6 premises including Forster Keys Fruit and Veg, Forster Keys Meat and Chicken and Sunshine Salon (Hairdresser).

Table 32 - Establishments and Floorspace by Category in Forster Keys Small Village

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	0	3	0	0	0	0	1	2
Floorspace (sqm)	0	380	0	0	0	0	60	210
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	6	0	6	0	0	0	0	6
Floorspace (sqm)	650	0	650	0	0	0	0	650

Source: Hill PDA Survey

Planning Controls

Under the Great Lakes Local Environmental Plan 1996, the land is zoned primarily as 3(a) General Business.

Performance

The village appears to be performing well, with no vacancies.

Issues and Challenges

The trade area of Forster Keys encompasses the local residential areas surrounding the small village. Breese Parade Centre is located in close proximity to the north of the small village. The small village is therefore heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location for small daily retail needs and personal services.

Breckenridge Channel, Forster

Location

This precinct is located approximately 1.5km south of the Wallis Lake Bridge (on the western side of Little Street) on the banks of the Breckenridge Channel. It comprises of a range of marine related activities associated with the use of the waterways and / or recreation and tourism. The uses comprise of six waterside premises with ancillary car parking.

Role and Function

The cluster provides for the boating needs of the local community and tourists to the area, as well as recreation and leisure activities.

Commercial and Retail Mix

The cluster comprises of six premises including the Forster Marina & Boatshed, Paradise Marina (Café + Boat Hire), Tiki Boatshed and the Aussie Boatshed.

Table 33 - Establishments and Floorspace by Category in Breckenridge Channel, Forster

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	0	0	1	0	0	0	0	0
Floorspace (sqm)	0	0	230	0	0	0	0	0

	Total Retail	Vacant	Total Shopfront	Boat Shed Related	Other Commercial	Auto Related Businesses	Other Pubs / Clubs etc	Total
No. of Premises	1	0	1	5	0	0	0	6
Floorspace (sqm)	230	0	230	710	0	0	0	940

Source: Hill PDA Survey

Figure 11 - Map of Breckenridge Channel, Forster

Source: Red Square

Planning Controls

The boatsheds and other structures are not zoned due to their location over the water.

Performance

There are currently no vacant boatsheds in the Breckenridge Channel area. Consultation with marine businesses has suggested however that the previous tourist season was poor. The businesses located in the boat shed premises are heavily reliant on tourists visiting the area and as a result the burden of the previous poor season has put a considerable amount of financial pressure on these businesses.

Issues and Challenges

The boatsheds are heavily reliant on tourists to the area and are subject to the challenges associated with the seasonal tourist trade such as employee shortages during the peak season and reduced turnover during the winter months.

The boatsheds are located on the waters edge and as a result, the premises must be aware of a range of environmental considerations. This is particularly the case if they wish to undertake any building works to expand or refurbish the site. Some of the potential environmental constraints include:

- impact on marine life;
- bank erosion;
- acid sulphate soils;
- impact on water quality;
- flooding; and
- sea level rise.

Lake Street, Forster

Two peripheral retail premises are located approximately 2.4km east of the Wallis Lake Bridge, by road. The premises front Lake Street, situated within a residential area.

Figure 12 - Plan of Peripheral Retail in Lake Street, Forster

Source: Red Square

Commercial and Retail Mix

There are two premises in the area, being Barry Austin Mowers and the Farmers Patch.

Table 34 - Establishments and Floorspace by Category in Lake Street, Forster

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services
No. of Premises	0	1	0	0	0	1	0	0
Floorspace (sqm)	0	280	0	0	0	360	0	0
	Total Retail	**Vacant**	**Total Shopfront**	**Boat Shed Related**	**Other Commercial**	**Auto Related Businesses**	**Other Pubs / Clubs etc**	**Total**
No. of Premises	2	0	2	0	0	0	0	2
Floorspace (sqm)	640	0	640	0	0	0	0	640

Source: Hill PDA Survey

Planning Controls

Under the Great Lakes Local Environmental Plan 1996, the land is zoned primarily as 2(a) Low Density Residential.

A recommendation was made by Council further to submissions received in relation to the Housing Strategy for Forster / Tuncurry for:

"Investigation into the establishment of a commercial / retail zone for the establishment of a neighbourhood shopping centre on the corner of Lake and Hadley Streets"

Performance

Both premises are occupied and appear to be trading well.

Issues and Challenges

The two establishments are located within close proximity to the Wharf Street, Forster and Breese Parade Centres. The two premises are also located outside of business zoned area. As a result, the two premises are heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the Farmer's Patch's and Barry Austin Mowers' location for their specialty food or specialised mower needs.

Any redevelopment of the site would be subject to existing use rights as detailed under the Environmental Planning and Assessment Act 1979.

8.3 Peripheral Businesses within Forster - Tuncurry

The Forster-Tuncurry Study Area includes a number of employment generating businesses which are located outside of the existing centres, bulky goods clusters and industrial precincts. These businesses are located on zoned land such as 3(a) General Business Zone, 2a (Low Density Residential) or 2b (Medium Density Residential). In the case of the residential zones, some uses may be permitted where as others fall under existing use rights. The jobs generated from such establishments have been taken into consideration as part of this Strategy in the existing employment assessment of Forster-Tuncurry.

Examples of such employment generating businesses include:

- The car yards and other employment generating businesses located along Manning Street to the north west of the Manning Street, Tuncurry Centre, such as Cullen Holden;
- The vacant petrol station site located on the northern corner of Milliken Street and Beach Street, approximately 400m to the east of the Manning Street, Tuncurry Village. Part of this site is currently used for a seafood retail outlet.
- The mix of commercial and retail premises located along Macintosh Street such as the Chiang 101 Thai House, optometrists, garden nursery and home based businesses;
- The current site on South Street, Tuncurry used by JR Richards & Sons as a vehicle workshop and businesses located between Palm Street and Coral Lane, Tuncurry.

8.4 Existing Bulky Goods and Wholesale Clusters

Bulky Goods Centres have emerged as a new form of retailing that has noticeably different characteristics and site requirements than traditional centres. They generally involve large – scale formats that are located outside of traditional retail areas due to the lower rents that may be negotiated in addition to other factors.

It is not uncommon for many of these stores to be established within industrial areas where land is available and rents cheap. This has proven the case in Great Lakes LGA as the present industrial zones permit bulky goods premises. Site requirements include high exposure, good accessibility, large site area to accommodate the store footprint and plentiful parking.

Table 35 - Bulky Goods Premises within Forster - Tuncurry

	Forster	Tuncurry	Total
No. of Premises	17	2	19
Floorspace (sqm)	17,900	210	18,110

Source: Hill PDA survey

The majority of bulky goods premises within Forster - Tuncurry are currently concentrated within Forster, particularly within the Breese Parade Centre.

The main locations within Breese Parade for bulky goods are:

- Forster Industrial Area;
- Stockland Shopping Centre; and
- The bulky goods area west of The Lakes Way, opposite Stockland Shopping Centre.

Figure 13 - Plan of Approximate Existing Locations of Bulky Goods in Breese Parade, Forster

* Star denotes the approximate location of existing Bulky Goods premises.
Source: Red Square.

Table 36 - Breakdown of Bulky Goods Retailing within Forster

	Wharf Street, Forster	Stockland Forster	Forster Industrial Area	South-West of Lakes Way	Lake Street, Forster	Total Forster
No. of Premises	1	3	10	2	1	17
Floorspace (sqm)	90	8,370	6,400	2,680	360	17,900

Source: Hill PDA survey

Forster Industrial Area Bulky Goods

Forster Industrial Area is located within the north-eastern section of the Breese Parade Centre, which is approximately 4km south-east of the Wallis Lake Bridge by road. The majority of bulky goods premises within the industrial area are located in the south east portion fronting Breese Parade, Enterprise Court and Boundary Street. The land is zoned 4(a) General Industrial Zone.

The area comprises of 10 bulky goods retailing premises, totalling 6,400sqm of floor space. Some of the larger bulky goods retailers are Harvey Norman Furniture (1,390sqm), Growthe Furniture (760sqm) and Retravision (427sqm).

Stockland Shopping Centre Bulky Goods

The Stockland Shopping Centre is situated within the Breese Parade Centre which is located approximately 4km south-east of the Wallis Lake Bridge by road. The Centre includes of a large amount of bulky goods floorspace (8,370sqm), however, this mainly relates to the Bunnings Warehouse which has a floor area of 8,000sqm. There are only two other bulky goods retailers within the shopping centre.

Bulky Goods West of The Lakes Way

There are two bulky goods premises located on the south-western side of The Lakes Way, opposite the Stockland Shopping Centre. These premises are Brian's Rise and Shine (960sqm) and Brian's Homemakers (1,720sqm).

8.5 Existing Industrial Precincts

The industrial precincts within the Forster - Tuncurry area are:

- Forster Industrial Area;
- Tuncurry Industrial Area; and
- The Sweet Pea Road Industrial Area.

Currently there is approximately 54ha of zoned industrial land in the Forster - Tuncurry area. Of this land, approximately 15ha is vacant. Another 0.65ha may be vacant in the Forster Industrial Area, as the land no longer appears to be used for storage. The South Forster Quarry may also provide some industrial land in the future.

Within the industrial areas there are a number of other lots, currently in use, which lend themselves to redevelopment more than other lots. This is due to there being no buildings on the lot or the structures on the site are small and relatively inexpensive to remove. There are eleven such lots which have been identified within the Forster and Tuncurry Industrial Areas. They have a total land area of approximately 2.7ha (including the land which no longer appears to be used for storage in the Forster Industrial Area, mentioned in the previous paragraph).

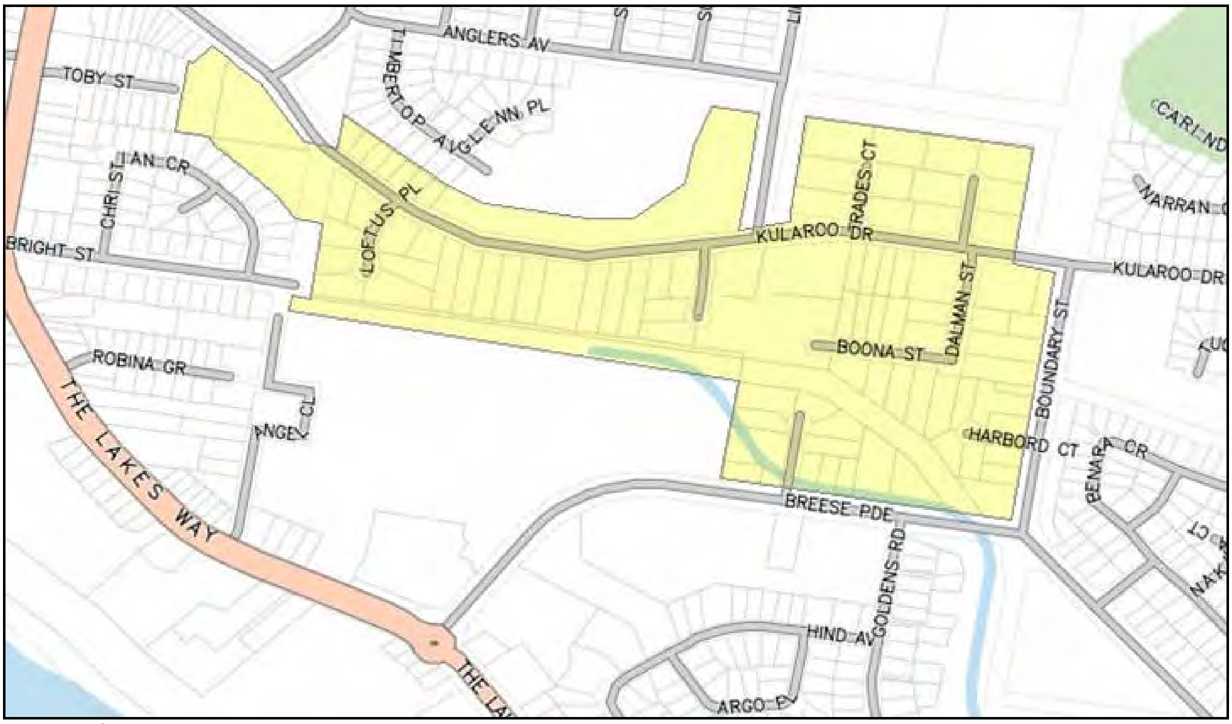
A description of existing industrial areas is detailed below.

Forster Industrial Area

The Forster Industrial Area is located within the north-eastern section of the Breese Parade Centre approximately 4km south-east of the Wallis Lake Bridge by road. The main roads serving the area are Breese Parade, Boundary Street and Kularoo Drive. The majority of the industrial area is bounded by residential land. Stockland Shopping Centre is located to the south-west of the industrial zone, with the Council Civic Centre to the south and some land zoned 6(a) Open Space and Recreation Zone to the north.

The area is zoned 4(a) General Industrial. The area is approximately 20ha based on the existing Great Lakes Zoning Map. The majority of the area is used for industrial purposes of varying intensities, with a number of lots in the south-east occupied by bulky goods premises.

Figure 14 - Plan of Forster Industrial Area as Zoned 4(a) by Great Lakes LEP 1996



Source: Red Square

The majority of lots in the Forster Industrial area are occupied. The main portion of vacant land is located north of Kularoo Drive and west of Likely Street.

Currently the area is host to 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, Colour Worx, Forster Bus Co., Readymix Concrete and the Water Filter Co.

Table 37 - Calculations for Forster Industrial Area

	Forster Industrial Area
Total Site Area	203,021sqm
Number of Vacant Lots	8
Total Vacant Land	27,600sqm
Vacancy Rate for land area	13.6%

Source: Great Lakes Council Survey

One of the main issues and challenges experienced by industrial businesses within the Forster Industrial Area is traffic. Traffic connections to the area are restrictive, particularly for the large trucks which serve the area. The area is accessible from both the north and the south, linking in both cases to the Pacific Highway.

The road network connecting Forster to the Pacific Highway in the north is by far the better quality and more direct link of the two; however it is constrained by the capacity of the two lane bridge crossing Wallis Lake. The bridge often experiences congestion, particularly during the tourist season, when the population of the Study Area increase dramatically.

To the south, the existing road network is hilly and winds around Wallis Lake and Myall Lake, stretching over 50km to the Pacific Highway. The road is more of a scenic drive than a major transport link and not ideal for transport vehicles. As a result, the industrial area experiences access constraints which have the potential to impact on the efficiency of the industrial area.

A large portion of the industrial area is surrounded by residential, which has the potential to cause conflict with the operation of industrial uses.

Tuncurry Industrial Area

The Tuncurry Industrial Area is located approximately 2km north of the Wallis Lake Bridge by road. The main roads serving the area are Manning Street, Grey Gum Road and Leo Street. The area is bounded by residential to the north, south and east and 1(c) Future Urban Investigation Zone to the west, with some 5(a) Special Uses Zone to the south and east.

The area is zoned 4(a) General Industrial. The area is approximately 26.5ha based on the existing Great Lakes Zoning Map. The majority of the area is used for industrial purposes of varying intensities.

Figure 15 - Plan of the Tuncurry Industrial Area as Zoned 4(a) by Great Lakes LEP 1996

Source: Red Square

The majority of lots which are subdivided are occupied. At the time of the study there was 12.2 ha of vacant land available within the Tuncurry Industrial Area. The main portion of vacant land is a single large lot located in the north-west. This land is yet to be subdivided and is in single private ownership.

Currently the area is host to a number of industrial companies including Mid-Coast Smash Repairs, Holiday Coast Storage, Fazio Bricks, Span Line, Ditchfield Contracting Pty Ltd, Great Lakes Moulding, Berklee Exhaust & Muffler Centre, Coastal Detail Joinery, B & W Kitchens & Craft, John Carmichael Auto Repairs, Fibreglass Pool Coating, Oasis Workware & Uniform Centre, Highline Formwork, Council Works Depot, Tuncurry Trailer, ABA Storage, Dairy Farmer Depot, Advanced Motorcycle & Mower Repairs, and Eggins Comfort Coaches.

Table 38 - Calculations for Tuncurry Industrial Area

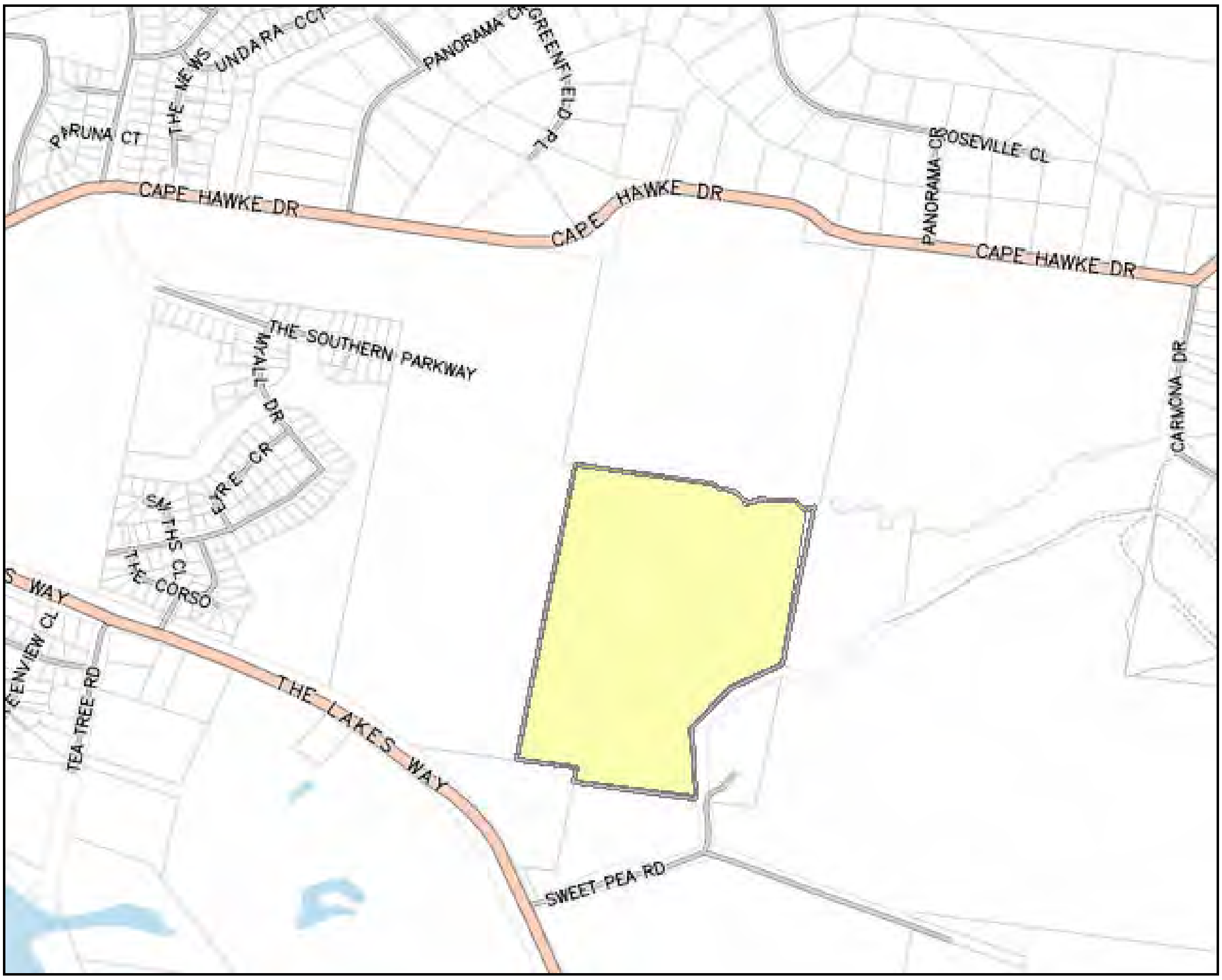
	Tuncurry Industrial Area
Total Site Area	264,876sqm
Number of Vacant Lots	9
Total Vacant Land	121,871sqm
Vacancy Rate for land area	46%

Source: Great Lakes Council survey

Sweet Pea Road Industrial Area (Undeveloped)

The Sweet Pea Road Industrial Area is located approximately 7.5km south-east of the Wallis Lake Bridge by road. The main road serving the area is Sweet Pea Road, which connects to The Lakes Way. The industrial zone is bound by land zoned 5(a) Special Uses to the north and west, and 1(c) Future Urban Investigation to the south and east. At present the land zoned as industrial is undeveloped.

Figure 16 - Plan of the Sweet Pea Road Industrial Area as Zoned 4(a) by Great Lakes LEP 1996



Source: Red Square

The area shown shaded in the plan above is currently zoned 4(a) General Industrial. The zone covers approximately 7.3ha based on the existing Great Lakes Zoning Map. There is a concrete plant located adjacent to the site as well as the Mid Coast Water Treatment Plan and two Quarries to the East (Hunter Ready Mix Concrete and Mobile Crushing Co.).

The South Forster Structure Plan 2006 identifies the Sweet Pea Road sand quarry site as potentially suitable (in the medium to long term) for industrial uses, dependant on the existing sand extraction operations. Subject to the completion or movement of the sand mining quarry, it is recommended by the Structure Plan that the land closer to the Lakes Way (and within the Sewerage Treatment Plant Buffer) is zoned and developed for industrial / employment generating purposes. This would then allow for the existing section of land zoned industrial to become available for residential purposes with the retention of the existing vegetated corridor as a buffer to sperate the residential from future industrial.

The Plan also highlights the potential for a well-designed, landmark industrial building at the junction of the Lakes Way and Sweet Pea Road.

A Council resolution supports the recommendations of the South Forster Structure Plan confirming the preparation of a draft LEP relating in part to the land swap discussed above.

Any development of land within the Sweet Pea Road Industrial Zone or surrounding area (such as the lots at the junction of the Lakes Way and Sweet Pea Road) would need to be subject to various environmental assessments including an ecological assessment and approval by the Department of Primary Industries.

8.6 Tuncurry and Forster Working Waterfront

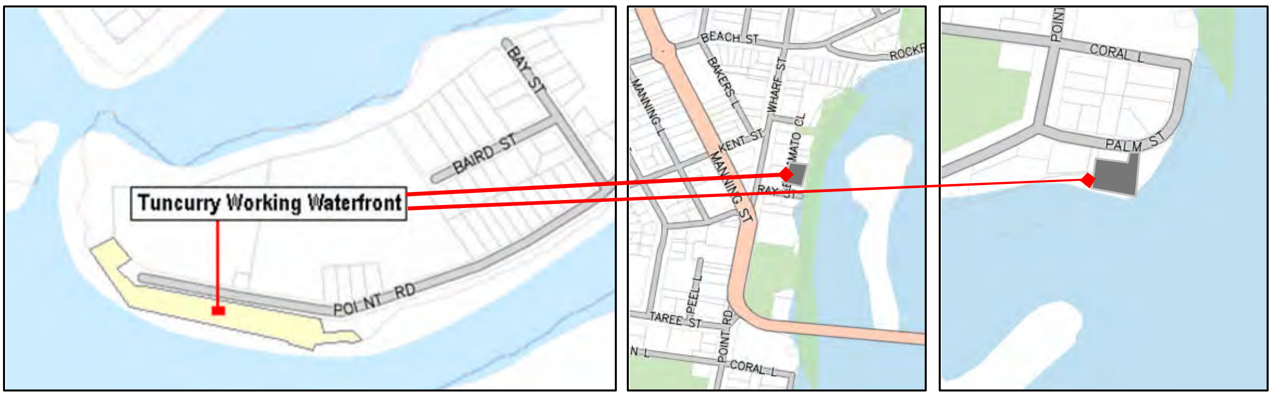
<u>Tuncurry Working Waterfront</u>

There are three geographic areas presently acting as Working Waterfronts in Tuncurry. One is located approximately 1.2km to the south-west of the Lake Wallis Bridge by road. The area is located on the southern side of Point Road, on the banks of Wallis Lake. The area comprises of a number of oyster farms which undertake activities such as oyster cleaning and provide punts and racks. The oyster farms make some sales direct to the public however, this is only ancillary to oyster farming.

A second working waterfront business in Tuncurry is known as Boatland Marine. Located on the waters edge, the boat house and related uses are approximately 400m to the south of the Manning Street, Tuncurry Village and 800m from the existing oyster farms.

The third working waterfront business in Tuncurry is located closer to the inlet of Walls Lake to the immediate south of the Manning Street, Tuncurry Centre. This area is occupied by the Wallis Lake Fisherman Cooperative.

Figure 17 - Plan of Tuncurry Working Waterfront Areas



Source: Red Square.

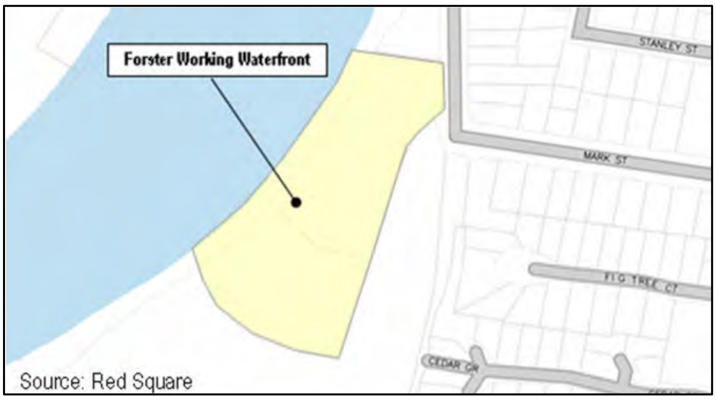
Hill PDA

The working waterfront areas in Tuncurry are zoned 3(d) — Special Business Waterfront under the current Great Lakes Local Environmental Plan 1996.

The waterfront in Tuncurry offers many recreational and functional opportunities to the residents and visitors of Tuncurry. This is evident with the location of the existing waterfront businesses, boat ramp facilities and parkland, mixed with the picturesque outlook and natural beauty of the surrounding area.

Forster Working Waterfront

Figure 18 - Plan of Forster Working Waterfront



Source: Red Square

The Forster working waterfront lands are located on the banks of Breckenridge Channel, to the south of the Wharf Street Forster Village Centre and the marine and tourist related uses located along the channel to the west of Little Street.

The working waterfront lands are located at the Junction of Little Street and Mark Street. Under the Great Lakes Local Environmental Plan 1996 they are designated as 3(d) — Special Business Waterfront.

These lands (shown in the figure above) are currently occupied by Graham Barclays Oysters. The business is an oyster farm which undertakes activities such as oyster cleaning and provides punts and racks. The oyster farm makes some sales direct to the public however, this is only ancillary to oyster farming.

8.7 Centre Hierarchy

The Mid-North Coast Regional Strategy 2008 currently identifies the role of the region's larger centres within a centre hierarchy. The Strategy identifies Forster - Tuncurry collectively as a Major Town. The role and scale of the centres within Forster - Tuncurry Major Town and the surrounding smaller centres were not however addressed. Accordingly this study establishes an existing centre hierarchy for the Study Area that is inclusive of all existing centres. The hierarchy was informed by the research undertaken by this study and a review of:

1. the retail mix and area of commercial floorspace of each centre;
2. the mix in diversity of retail and commercial uses within each centre;
3. the magnitude of primary anchors; and
4. the trade / catchment area of each centre.

Notwithstanding the factors listed above, there are numerous complexities associated with defining a retail hierarchy - most notably is the fact that retail centres can perform different roles. Retail centres can have more than one role and have different trade areas for each role or function. In other cases a retail centre may not have a clearly defined trade area.

Each of the above factors has been considered by Hill PDA when establishing a centre hierarchy for Forster - Tuncurry. The table below shows the existing centres within the Study Area and their place within the centre hierarchy.

Table 39 - Existing Forster - Tuncurry Centre Hierarchy

Centre Category	Centre Name
Town Centre	Breese Parade, Forster
Village Centre	Wharf Street, Forster
	Manning Street, Tuncurry
Small Village Centre	Fairways
	Forster Keys
Peripheral Retail	Lake Street, Forster
	Located in Tuncurry
	Located in Forster
Specialised Activities	Breckenridge Channel, Forster
Industrial Area	Forster Industrial Area
	Tuncurry Industrial Area
	Sweet Pea Road Industrial Area
Working Waterfront	Tuncurry Working Waterfront
	Forster Working Waterfront
Medical Precinct	Forster Medical Precinct

Source: Hill PDA

Figure 19 - Plan of Existing Forster - Tuncurry Centre Hierarchy

Source: Hill PDA/Red Square

8.8 Employment Lands Hierarchy

Forster - Tuncurry contains two primary or strategic industrial areas and one secondary industrial area. This study establishes an employment lands hierarchy for the Study Area. This categorisation was informed by the research undertaken by this strategy and a review of:

1. the total land area of the industrial area; and
2. the number of tenants.

Each of the above factors has been considered by Hill PDA when establishing an employment lands hierarchy for Forster - Tuncurry.

Table 40 - Existing Forster - Tuncurry Employment Lands Hierarchy

Category	Employment Lands
Primary Industrial Areas	Forster Industrial Area
	Tuncurry Industrial Area
Secondary Industrial Area	Sweet Pea Road Industrial Area

Source: Hill PDA

8.9 Other Employment generating uses

Within the Forster - Tuncurry area, two distinct concentrations of particular industries have developed outside of the existing centres and employment lands. A Tertiary Education Precinct has developed to the north of Tuncurry and a Medical Precinct has developed within west Forster.

Table 41 - Other Employment generating uses in Forster - Tuncurry

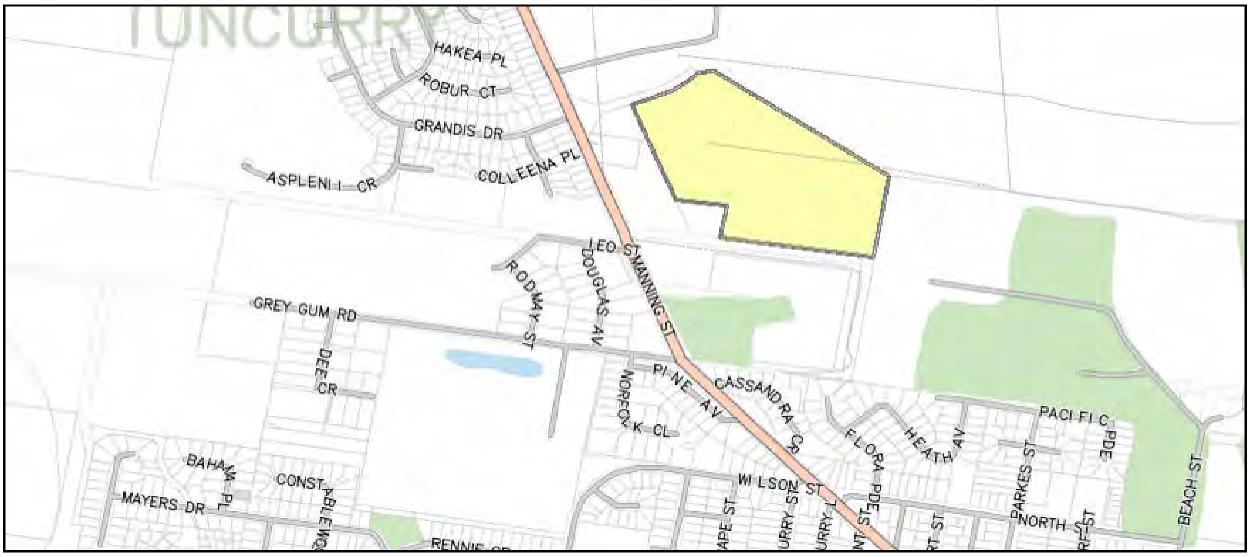
Category	Name
Tertiary Education Precinct	The Great Lakes Joint Education Campus
Medical Precinct	Forster Medical Precinct

Source: Hill PDA

The Great Lakes Joint Education Campus

The Great Lakes Joint Education Campus is, located to the north of the Manning Street, Tuncurry Centre and south of the North Tuncurry Crown Land Site. The campus is accessible via Manning Street to the west of the site and bound by a mix residential, industrial and vegetated bushland.

Figure 20 - Map of the Great Lakes Joint Education Campus



Hill PDA

Source: Red Square

The area is zoned 2(a) Low Density Residential. The site is estimated to be approximately 11ha in area.

The Campus is occupied by the Great Lakes College being the Tuncurry Junior Campus and the Tuncurry Senior Campus, and the Great Lakes North Coast Institute TAFE Campus.

The Great Lakes North Coast Institute TAFE Campus had 1,384 enrolled students in 2007 with around 400 employed staff.

Further to the high school education offered within the precinct, the TAFE offers courses relating to:

- arts and media;
- business;
- community services and health;
- construction and transport;
- information technology;
- primary industry and natural resources; and
- tourism, hospitality, retail and personal services.

The Forster Medical Precinct

The Forster Medical Precinct is the main focus of health related uses in the Study Area. The Precinct is located approximately 1.8km south-east of the Wallis Lake Bridge by road and is serviced by South Street and Breckenridge Street.

The Forster Private Hospital is located within the Precinct with a number of medical support premises located nearby. The precinct is surrounded by residential dwellings. This is reflected by the precincts existing 2(b) Medium Density Residential Zone. The precinct is estimated to be more than 1ha in area.

In order to facilitate the provision of an 'Integrated Primary Health Care Facility' Council resolved to rezone land in the South Street Medical Precinct of Forster. The land in question is adjacent to the existing hospital to the west and presently zoned 6(a) Open Space and Recreation (shown as hatched on the adjacent plan) and 2(b) Medium Density Residential (shown as solid yellow colour on the adjacent plan). The resolution to rezone the 2(b) land to 5(a) Special Uses – Hospital and the associated proposed amendment to the Great Lakes LEP 1996 has subsequently been gazetted by the Department of Planning.

Figure 21 - Plan of the Forster Medical Precinct

Source: Red Square

Note: Hatching above indicates the proposed area to be rezoned to 5(a) Special Uses - Hospital

The second level of the hospital is currently vacant and has capacity to take on more patients in the future. Currently the hospital provides the following services:

- day procedures;
- ear, nose and throat surgery;
- general medicine;
- general surgery;
- after hours GP service;
- high dependency;
- ophthalmology;
- orthopaedic surgery;
- urological surgery;
- paediatrics;
- stress testing;
- palliative care; and
- home nursing - Community Private Home Care.

The precinct is occupied by medical support business such as:

- pathology clinic ;
- day surgery; and
- family medical centre (general practitioners).

A range of other services are also available in the area including:

- physiotherapy;
- gynaecological and obstrictions;
- hearing;
- dentistry;
- podiatry;
- orthopaedic surgeon;
- eye surgery; and
- diagnostic medical imaging.

In addition to the services listed above, there are a number of people who practice from their homes around the Study Area in other health related industries such as:

- massage therapy;
- reiki;
- bowen therapy;
- reflexology; and
- yoga.

8.10 Centres Influencing Forster - Tuncurry

There are a number of centres located external to the Forster-Tuncurry Study Area that influence retail and service demand and provision within Forster-Tuncurry. The Centres which have the greatest influence on Forster-Tuncurry are those that are located in close geographic proximity and / or have an extensive range of retail and commercial premises as well as major anchor stores. This variety and strength of trade can improve the appeal of these centres to shoppers and visitors drawing trade from wider catchment areas.

Three Centres of this type have been identified by the Strategy - Taree, Port Macquarie and Newcastle CBD. Details of each of these centres and the strength of their retail and business offer is discussed further below.

Taree

Taree has been identified as a Major Regional Centre by the Mid-North Coast Regional Strategy. Taree is located approximately 34km to the north of Forster - Tuncurry.

Taree comprises of two main retail centres, being Manning Mall, which includes a Kmart and a Bi-Lo and Taree City Centre, which includes a Big W and a Woolworths. Collectively, the two centres provide just over 26,000sqm of space (draft GLELS 2006).

Taree also comprises of a large traditional retail strip of shop front premises and some surrounding developments.

Port Macquarie

Port Macquarie has been identified as a Major Regional Centre under the Mid-North Coast Regional Strategy. Port Macquarie is located approximately 110km to the north of Forster - Tuncurry.

Shopping Centres located within Port Macquarie include Port Central Shopping Centre (which provides a Target and a Ritchies Supa IGA) and Settlement Shopping Centre (which includes a Woolworths, a Big W and a Best and Less). There is also a large amount of shop-front retail in the centre.

Newcastle

Newcastle CBD has been identified as a Regional Centre under the Lower Hunter Regional Strategy. Newcastle is located approximately 163km to the south west of Forster – Tuncurry via road.

Newcastle CBD is the main commercial and administration centre within Newcastle LGA and is the regional location for a number of state government agencies and private business headquarters. The retail and commercial space stretches approximately 2km along Hunter and King Streets and fills three distinctive areas – the East End and Mall, Civic and West End.

Newcastle CBD has around 100,000sqm of retail space, of which around 30,000sqm is located within the West end. Newcastle CBD is anchored by a 14,000sqm David Jones store; 5,000sqm Spotlight (west end) and a 3,000sqm Coles supermarket in Marketown (west end).

Newcastle CBD is designated as a Regional Centre given it historic role and as a result of the large range of government and other commercial offices located within the CBD.

Part C - Forecasts For Change

9. Retail Demand

Demand for retail floorspace is dependent upon household expenditure. Household expenditure is in turn dependent upon the number of households and the socio-demographic characteristics of those households. Most notably, there is a strong correlation between expenditure, household type and household income levels.

In the 1980s, Australian retail floor space totalled approximately 1.8sqm per person which was divided into regional, district and neighbourhood / local centres. Now, the amount of floorspace per capita is approximately 2.0sqm per person with bulky goods stores taking about 20% of the market share from the traditional centres. In general, it is estimated that:

- 0.6sqm relates to Regional Cities, Global Cities and Major Centres;
- 0.4sqm relates to Neighbourhoods and Small Villages;
- 0.4sqm to Bulky Goods Retailing / Out of Centre Retailing; and
- 0.6sqm to the balance i.e. Town Centres and Villages.

In order to identify more specifically the degree of retail demand generated by residents within Forster - Tuncurry, Hill PDA prepared a Retail Expenditure Model. The model combined Forster - Tuncurry's demographic characteristics (as outlined in Section 3) with the estimated population as of 2006. Household expenditure was sourced from the following sources:

- the ABS Household Expenditure Survey 2003-04 which provided household expenditure by broad commodity type by household income quintile, and the ABS Retail Survey 1998-99; and
- the Marketinfo 2006 database which is generated by combining and updating data from the 2006 Population Census and the ABS Household Expenditure Survey (HES) using “micro simulation modelling techniques”.

Marketinfo combined the data from the Census, HES and other sources to derive total household expenditure by commodity type. This data, which was validated using taxation and national accounts figures, quantified around 14% more expenditure than the ABS HES Survey.

This data has been assessed in order to quantify the amount of expenditure likely to be generated in Forster - Tuncurry both at present, and over the study period, up to 2031. This expenditure was then translated into demand for retail floorspace.

Considering projected retail demand and existing supply, this section also provides recommendations as to the quantum of additional retail floorspace required in Forster - Tuncurry over the study period, its type and where it should be located.

9.1 Forster - Tuncurry Trade Area

As a fundamental component of Hill PDA's modelling, a 'Trade Area' for Forster - Tuncurry was established in consultation with Council and local retailers. A trade area refers to a defined geographical region whereby the majority of expenditure within that region is captured by the subject retail centre or centres. Alternatively it refers to a major proportion of expenditure where trade areas overlap. It is important to also note that there may be different trade areas for different types of retail stores or commodities.

The definition of a Trade Area served by any town centre is determined by a number of factors including:

- the strength and attraction of the centre in question, determined by factors such as the composition, layout, ambience / atmosphere and car parking offer in the centre;
- competitive retail centres, particularly their proximity to the subject centre and respective sizes, retail offer and attraction;
- the location and accessibility of the centre, including the available road and public transport network and travel times; and
- the presence or absence of physical barriers, such as rivers, railways, national parks and freeways.

Having regard to the factors outlined above, we have defined the Primary Trade Area (PTA) for Forster - Tuncurry as being made up of the following 'Urban Centre's' or 'Localities' that are defined by the ABS 2006:

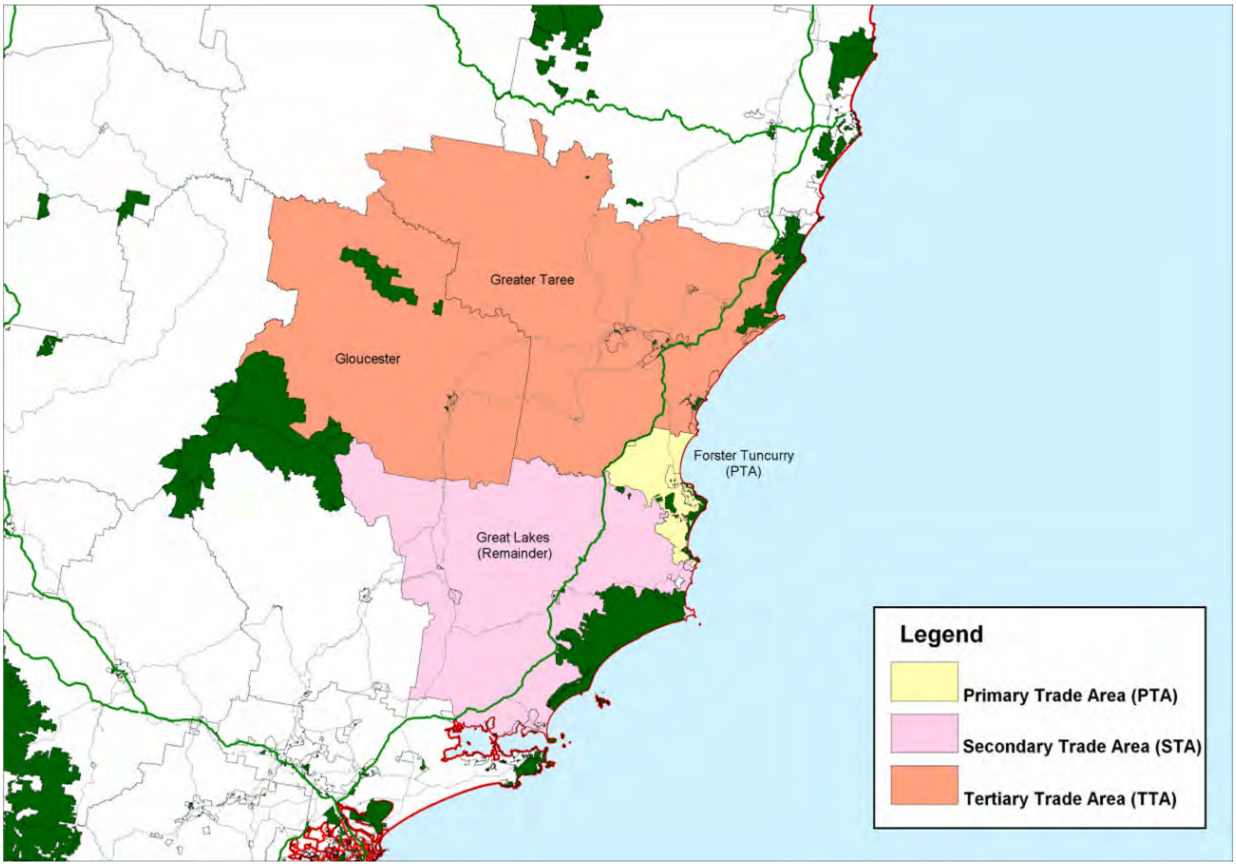
- Nabiac;
- Darawank;
- Forster – Tuncurry;
- Failford;
- Pacific Palms – Blueys Beach (including Boomerang Beach and Elizabeth Beach);
- Green Point;
- Coomba Park;
- Smiths Lake;
- Bungwahl; and
- Tarbuck Bay.

The remaining portion of the Great Lakes LGA has been defined a Secondary Trade Area (STA) for Forster - Tuncurry.

For the purposes of this assessment, a component of trade capture is also factored in from Taree and Gloucester. These LGAs are considered part of Forster - Tuncurry's Tertiary Trade Area (TTA).

The figures below show what is considered to be Forster - Tuncurry's PTA, STA and TTA.

Figure 22 - Forster - Tuncurry Trade Areas



Source: Hill PDA

9.2 Existing Retail Demand and Expenditure

Using Hill PDA's Retail Expenditure Model the table below has been prepared to show the total retail expenditure generated within Forster - Tuncurry's PTA and STA by retail category. The table is based on the estimated population within the Trade Areas, as well as estimated household expenditure.

Table 42 - Total Retail Expenditure Generated by Forster - Tuncurry PTA & STA Residents ($m2006)

Retail Category	PTA	STA	Total
Supermarkets & Grocery Stores	65.7	26.5	92.2
Specialty Food Stores	25.7	10.4	36.1
Fast-Food Stores & Restaurants	30.9	12.7	43.6
Department Stores	17.0	6.9	24.0
Clothing Stores	12.6	5.1	17.7
Bulky Goods Stores	34.0	13.8	47.8
Other Personal & Household Goods Retailing	22.5	9.1	31.7
Selected Personal Services	7.2	2.9	10.1
Total Retailing	**215.7**	**87.4**	**303.1**

Source: Hill PDA BS Household Expenditure Survey 1998-99 and Marketinfo 2004.

Using the data in the table above and cross tabulating it with anticipated retail turnover rates, the table below shows the total retail floorspace demand is on average 1.8sqm per capita. This is below the per capita average across Australia (i.e. 2.0sqm / person), and for the Sydney SD of 2.20sqm of retail per capita indicating lower household incomes consistent with the demographic analysis discussed in Section 3.

Table 43 - Total Retail Floorspace Demand Generated by Forster - Tuncurry PTA & STA Residents 2006

YEAR	PTA	STA	Total
Supermarkets & Grocery Stores	7,301	2,941	10,242
Specialty Food Stores	3,433	1,383	4,816
Fast-Food Stores & Restaurants	5,626	2,303	7,929
Department Stores	4,871	1,977	6,848
Clothing Stores	2,794	1,134	3,928
Bulky Goods Stores	11,324	4,598	15,922
Other Personal & Household Goods Retailing	5,010	2,032	7,042
Selected Personal Services	2,060	835	2,895
Total Retailing	**42,419**	**17,203**	**59,622**

Source: Hill PDA BS Household Expenditure Survey 1998-99 and Marketinfo 2004

Bulky Goods

The table above shows that bulky goods is the largest category (by floorspace) of retail demand. Bulky goods retailing may relate to electrical appliances, furniture, floor coverings, hardware, sports, and camping stores. This demand is attributed to the growth in the number of households being developed in the Forster – Tuncurry Study Area and hence the demand for these goods to furnish these homes. Furthermore, a greater amount of floorspace is required for this category of retail owing to the nature of its goods requiring large display and loading areas.

Supermarkets

Supermarkets (including convenience stores and small mixed business stores) are the second largest retail floorspace category required within Forster - Tuncurry. As of 2006 there was demand generated within the PTA for 7,301sqm of supermarket and grocery store floorspace. Dependent on size, this demand may translate into the provision of approximately 9[18] smaller supermarkets or four smaller supermarkets and 1[19] large or 'Full Line' supermarket.

Factoring in expenditure generated by households within both the PTA and STA (the entire Great Lakes LGA) demand would increase to 12[20] smaller supermarkets or three smaller supermarkets and 2[21] large / 'Full Line' supermarkets.

9.3 Existing Supply vs. Existing Demand

By comparing demand generated (as discussed above) with existing floorspace, it has been possible to identify whether there is an existing surplus or deficit of retail floorspace in Forster - Tuncurry.

The table below provides a breakdown of existing retail floorspace by category supplied in Forster - Tuncurry and compares this to the demand generated for retail floorspace by households within the Trade Areas.

It is important to note that the figures shown in the table below do not account for additional expenditure that is being captured by Forster – Tuncurry's Centres from tourists or surrounding LGA's (such as Gloucester or Taree). Furthermore it does not account for the expenditure that is being lost from Forster – Tuncurry Trade Area as a result of residents shopping in Taree, Port Macquarie or Newcastle. Rather it shows how supply relates to resident demand.

Therefore assuming Forster - Tuncurry was a closed system, the table below shows that there is:

- an oversupply of supermarket and grocery floorspace in the order of 4,669sqm. This oversupply confirms that there is expenditure being pulled from surrounding urban centres to support this retail category in Forster - Tuncurry. In other words, residents from other urban centres are travelling to Forster - Tuncurry to conduct a portion of their supermarket shopping. The oversupply is also likely to be attributed to tourist expenditure and (to a small degree) the foresight of the supermarket retailers to protect the future market in Forster - Tuncurry from competitors;
- an oversupply of catered food retailing (such as take-away stores, cafes and restaurants). The existing oversupply in this category is a likely reflection of the additional demand generated by the local tourist industry and therefore greater demand for food, leisure and entertainment related activities;
- an oversupply of department store and bulky goods floorspace. This oversupply indicates a significant pull of expenditure from surrounding LGAs to support this category and the recent extension to the

[18] Average floor Area of 800sqm
[19] Average floor Area of 4,000sqm
[20] Average floor Area of 800sqm
[21] Average floor Area of 4,000sqm

Stockland Shopping Centre in Breese Parade. A Major Centre in an LGA is expected to have a significant pull on expenditure from households across the LGA for higher level shopping of this nature.

Table 44 - Forster - Tuncurry LGA – Floorspace (sqm) Supply vs. Demand 2006

	Demand 2006	Existing Supply 2006	Oversupply
Supermarket & Grocery Store	7,301	12,000	4,699
Specialty Food	3,433	3,460	27
Catered Food	5,626	8,050	2,424
Department Store	4,871	7,340	2,469
Apparel	2,794	5,520	2,726
Bulky Goods	11,324	17,750	6,426
Other Non-Food Retail	5,010	9900	4,890
Personal Services	2,060	4370	2,310
Total Retail	**42,419**	**68,390**	**25,971**

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

* Note blue colour represents oversupply, red represents undersupply

9.4 Future Retail Demand

The main influence on the demand for retail floorspace in Forster - Tuncurry over the study period will be the rate of population growth. The growing affluence of households, and therefore their increasing ability to purchase goods and services, will be another significant factor. This means that the significant anticipated population growth in addition to any socioeconomic improvements to Forster - Tuncurry's households over the study period will translate into a significant growth in demand for retail floorspace.

In order to project the growth in demand for retail floorspace to 2031, the socio-economic characteristics of the population (as outlined in Section 3), together with the estimated household growth rates provided by Council (also outlined in Section 3), were utilised by Hill PDA's Retail Expenditure Model. The level of expenditure anticipated to be generated in 2031 was then translated into demand for retail floorspace.

The Hill PDA Retail Expenditure Model calculates not only what the cumulative household expenditure in Forster - Tuncurry will be, but also what type of store this expenditure might be spent in. This is particularly relevant for planning as stores types like supermarkets, personal services and speciality food, predominantly need to be locally based, while store types like bulky goods and department stores can be regionally based.

The following table provides a breakdown of net growth in retail expenditure by retail category for 2016, 2021 and 2031.

Table 45 - Total Retail Expenditure Forecast for PTA 2006 - 2031 ($m2006)

YEAR	2006	2016	2021	2031	Net Change
Supermarkets & Grocery Stores	65.7	84.2	95.4	122.3	56.6
Specialty Food Stores	25.7	33.0	37.4	47.9	22.2
Fast-Food Stores & Restaurants	30.9	39.7	44.9	57.6	26.6
Department Stores	17.0	21.9	24.7	31.7	14.7
Clothing Stores	12.6	16.1	18.3	23.4	10.8
Bulky Goods Stores	34.0	43.6	49.3	63.2	29.2
Other Personal & Household Goods Retailing	22.5	28.9	32.7	42.0	19.4
Selected Personal Services	7.2	9.2	10.5	13.4	6.2
Total Retailing	**215.7**	**276.6**	**313.2**	**401.5**	**185.7**

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

As shown above, between 2006 and 2031, retail expenditure in the PTA will increase by close to $186m. Factoring in expenditure generated by households in the STA, total expenditure will increase to $550m or by $247m.

Table 46 - Total Retail Expenditure Forecast for Combined PTA & STA 2006 - 2031 ($m2006)

YEAR	2006	2016	2021	2031	Net Change
Supermarkets & Grocery Stores	92.2	117.2	131.9	167.3	75.2
Specialty Food Stores	36.1	45.9	51.7	65.6	29.4
Fast-Food Stores & Restaurants	43.6	55.4	62.4	79.1	35.5
Department Stores	24.0	30.5	34.3	43.5	19.5
Clothing Stores	17.7	22.5	25.3	32.1	14.4
Bulky Goods Stores	47.8	60.7	68.4	86.7	38.9
Other Personal & Household Goods Retailing	31.7	40.3	45.4	57.5	25.8
Selected Personal Services	10.1	12.9	14.5	18.4	8.3
Total Retailing	**303.1**	**385.3**	**433.9**	**550.2**	**247.1**

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

Using industry benchmark target turnover rates, the tables above may be converted into additional floorspace demand generated over the study period.

Table 47 - Retail Floorspace (sqm) Demand for Forster - Tuncurry PTA 2006 - 2031

YEAR	2006	2016	2021	2031	Net Change
Supermarkets & Grocery Stores	7,301	9,359	10,597	13,585	6,284
Specialty Food Stores	3,433	4,401	4,983	6,388	2,955
Fast-Food Stores & Restaurants	5,626	7,212	8,165	10,468	4,842
Department Stores	4,871	6,244	7,070	9,063	4,193
Clothing Stores	2,794	3,582	4,056	5,199	2,405
Bulky Goods Stores	11,324	14,517	16,436	21,071	9,747
Other Personal & Household Goods Retailing	5,010	6,423	7,272	9,323	4,313
Selected Personal Services	2,060	2,641	2,991	3,834	1,773
Total Retailing	**42,419**	**54,380**	**61,571**	**78,931**	**36,512**

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

Hill PDA expenditure modelling demonstrates that over the next 25 years, there will be demand generated in Forster - Tuncurry's PTA for an additional 35,512sqm of retail floorspace. This represents an 83% increase to existing household demand.

Table 48 - Retail Floorspace (sqm) Demand for Great Lakes PTA and STA 2006 - 2031

YEAR	2006	2016	2021	2031	Net Change
Supermarkets & Grocery Stores	10,242	13,019	14,660	18,592	8,350
Specialty Food Stores	4,816	6,122	6,893	8,742	3,926
Fast-Food Stores & Restaurants	7,929	10,078	11,348	14,389	6,460
Department Stores	6,848	8,705	9,802	12,430	5,582
Clothing Stores	3,928	4,994	5,623	7,130	3,202
Bulky Goods Stores	15,922	20,240	22,789	28,900	12,978
Other Personal & Household Goods Retailing	7,042	8,951	10,079	12,782	5,740
Selected Personal Services	2,895	3,680	4,143	5,255	2,360
Total Retailing	**59,622**	**75,790**	**85,338**	**108,220**	**48,598**

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

Combining the PTA and STA, over the next 25 years, there will be demand generated in Great Lakes LGA for an additional 48,598sqm of retail floorspace. Therefore 73% of all additional demand generated within the LGA will be within the Forster - Tuncurry PTA.

It is important to reiterate however that the floorspace projections shown above relate to the growth of the resident population only. The following sections factor in additional expenditure captured by Forster - Tuncurry as a result of Tourism and visitors from surrounding LGAs. The following also factors in retail expenditure lost from Forster - Tuncurry to surrounding centres.

9.5 Tourism Expenditure

In addition to household expenditure discussed above, demand for retail services is also generated by visitors or tourists to an area. The Great Lakes LGA supports a $246m annual tourism industry[22]. This figure relates to expenditure generated by the 14,000 international; 511,000 domestic overnight and 401,000 domestic day visitors to Great Lakes each year[23].

Tourists increase demand in particular for retail floorspace and services such as restaurants, cafes, accommodation and entertainment. To exemplify this, eating out / visiting restaurants was the most frequent or 'top' activity nominated by tourists to Great Lakes in response to the Tourism Research Australia Visitor Survey. This activity was more frequently cited than visiting friends / relatives, going to the beach or driving around.

To translate tourist dollars into floorspace demand, we have used Tourism Australia research derived from the 2003 National Visitors Survey. This research states that approximately 28% of expenditure within the Hunter Region may be attributed to the drink and food category; 24% to accommodation and 13% to shopping.

In light of the tourist spend survey results, tourism within Great Lakes, on a per annum basis accounts for an additional:

[22] Tourism Profiles for LGAs in Regional Australia NSW, Tourism Research Australia 2007

[23] Tourism Profiles for LGAs in Regional Australia NSW, Tourism Research Australia 2007

- $69m of drink and food related expenditure;
- $59m of accommodation expenditure; and
- $32m of shopping expenditure.

Based on the estimated Tourism expenditure captured by Great Lakes per annum, we have calculated that there is a corresponding increase in demand for 15,000sqm[24] of retail floorspace.

It is important to also consider however the degree of household expenditure that is also lost from the LGA annually as a result of Great Lakes residents visiting other destinations for tourism. Given the nature of the region as a well recognised tourist destination, on balance this Strategy considers it appropriate to factor in a net gain in tourist dollars for Great Lakes and therefore retail demand.

Forster - Tuncurry is the main tourist centre for the LGA. It provides an array of accommodation options for tourists within its centres. Forster - Tuncurry also attracts a significant number of day tourists from surrounding regions. Taking this into consideration, for the purposes of this assessment, it has been conservatively assumed that 50% of all tourist generated demand for retail floorspace is captured by Forster - Tuncurry or 7,500sqm. This demand has been proportionally spread across each retail category for analysis.

9.6 Household Expenditure Capture and Loss

Owing to the type of retail floorspace provided within Forster - Tuncurry and the nature of surrounding centres, additional household expenditure is expected to be captured by Forster - Tuncurry retailers from households in surrounding LGAs.

Notwithstanding this, it is also anticipated that expenditure generated by households within Forster - Tuncurry's PTA and STA leaks or 'escapes' to other regions / LGAs owing to the strength of their retail offer or because Forster - Tuncurry residents work in other LGAs such as Greater Taree.

To account for these variations, Hill PDA has reviewed the type of floorspace provided within Forster - Tuncurry and the surrounding LGAs. Based on the characteristics of these competing centres, Hill PDA has applied 'capture rates' to the various retail categories and the level of expenditure they may reasonably capture. Capture rates have been applied for Forster - Tuncurry households as well as households located within the STA and TTA.

To identify appropriate capture rates we have used value judgements taking into account travel distances, accessibility and the strength of retail offer to apportion trade generated within Forster - Tuncurry and areas surrounding the centre. We have also considered the different capture rates and trade areas generated for different types of retail stores or commodities.

[24] Applying Target Turnover rates of $5,500

For example for food and grocery shopping, shoppers generally choose a retail centre closer to where they live provided that the retail offer is good.

'Top up' shopping is often referred to as shopping for a few items of food and groceries when needed quickly. This type of shopping is often conducted in a range of possible locations such as petrol stations and convenience stores.

The choice of retail centres for clothing shopping is more limited. In this case shopping for clothes can become quasi-entertainment rather than a chore. Often it's a case of comparing items in different stores and so shoppers will travel further to centres with a greater retail offer. In this case the major destinations for clothes shopping are the larger centres such as Stocklands Forster - Tuncurry, Taree, Kotara Westfield, Maitland Greenhills, Myer Newcastle and Port Macquarie.

For example, owing to the strength of retailing within Newcastle with centres such as Kotara and department stores such as Myer it has been assumed that a portion of expenditure is lost from the LGA in the bulky goods and department store categories. Conversely expenditure from neighbouring LGAs such as Gloucester and Taree may be gained in some categories such as bulky goods, clothing and discount department stores.

Owing to the nature of supermarket and specialty food shopping, the vast majority of expenditure within this category has been retained within the respective LGAs. In fact over 90% of supermarket, grocery, specialty food, fast food, restaurant and personal service related expenditure has been assumed for retention by retailers within the Forster - Tuncurry Centres.

Based on this refined analysis, it was found that as of 2006 there was demand for 53,952sqm of retail floorspace in Forster - Tuncurry Town Centre. By 2031, as a result of population growth in Forster - Tuncurry and demographic changes in surrounding LGAs, there will be demand for 90,931sqm or a net increase of 36,978sqm. This represents a 68% increase on existing floorspace.

Even assuming a State average population growth rate of 1% per annum coupled with a household expenditure growth of 1% per annum, one can assume an area's demand for retail floorspace will increase by 50% over 30 years. In the case of Forster - Tuncurry, with a strong growth rate it is understandable that floorspace will almost double over the next 30 years.

Table 49 - Growth in Demand for Retail Floorspace (sqm) by Category in Forster - Tuncurry 2006 – 2031

YEAR	2006	2016	2021	2031	Delta 06 - 31
Supermarkets & Grocery Stores	9,220	11,226	12,427	15,317	6,097
Specialty Food Stores	4,333	5,276	5,840	7,199	2,865
Fast-Food Stores & Restaurants	7,610	9,246	10,223	12,569	4,958
Department Stores	7,764	9,379	10,329	12,567	4,802
Clothing Stores	3,137	3,801	4,194	5,121	1,984
Bulky Goods Stores	14,406	18,072	20,232	25,319	10,913
Other Personal & Household Goods Retailing	5,135	6,272	6,948	8,557	3,422
Selected Personal Services	2,345	2,987	3,369	4,284	1,938
Total Retailing	**53,952**	**66,257**	**73,563**	**90,931**	**36,978**

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2004

9.7 Existing Supply vs. Future Demand

By comparing the forecasted growth in demand that will be generated within the Forster - Tuncurry Trade Areas over the study period, with actual floorspace, it has been possible to identify whether there is an existing surplus or deficit of retail floorspace provided by the Major Town Centre.

Taking the table above, and the column referring to the net growth in demand for retail floorspace, it has also been possible to identify the net increase in floorspace that will be required in the centre over the study period, by taking existing floorspace supply away from forecast floorspace demand.

Table 50 - Growth in Floorspace (sqm) Demand Factoring in Existing Supply 2006 – 2031

Retail Category	2006 Demand	Additional Required	2016 Demand	Additional Required	2021 Demand	Additional Required	2031 Demand	Additional Required
Supermarkets & Grocery Stores	9,220	2,780	11,226	774	12,427	- 427	15,317	- 3,317
Specialty Food Stores	4,333	- 873	5,276	- 1,816	5,840	- 2,380	7,199	- 3,739
Catered Food	7,610	440	9,246	- 1,196	10,223	- 2,173	12,569	- 4,519
Department Stores	7,764	- 424	9,379	- 2,039	10,329	- 2,989	12,567	- 5,227
Apparel	3,137	2,383	3,801	1,719	4,194	1,326	5,121	399
Bulky Goods Stores	4,406	3,344	18,072	- 322	20,232	- 2,482	25,319	- 7,569
Other Non-Food Retail	5,135	4,765	6,272	3,628	6,948	2,952	8,557	1,343
Selected Personal Services	2,345	2,025	2,987	1,383	3,369	1,001	4,284	86
Total Retailing	**53,952**	**14,438**	**66,257**	**2,133**	**73,563**	**- 5,173**	**90,931**	**- 22,541**

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2004

* Note blue colour represents oversupply, red represents undersupply

The table above shows the net growth in demand for retail floorspace within each sector based on household expenditure generation. The table accounts for trade lost from the LGA and trade captured. It does not however factor in the spatial distribution of existing floorspace.

The table above shows that taking into account supply by 2031 there will be an undersupply or demand (in red) for an additional 22,541sqm of retail floorspace in Forster - Tuncurry. This demand will be across all categories except apparel (i.e. Clothing), non food retail and selected personal services (blue colour).

For the purposes of retail planning, the table above also breaks down forecasted demand compared to existing supply into short term (present to 2016), medium term (2016 to 2026) and long term periods (2016 to 2031). The following discusses the implications of the results to retail planning over these periods.

<u>Short Term 2006 – 2016</u>

By 2016 there will be no net additional demand for retail floorspace across the Study Area. This however is a result of the existing oversupply of supermarket and grocery floorspace, apparel, other non food retailers and personal services.

The oversupply in these categories masks the fact that by 2016, there will be an undersupply (figures in red) of specialty food retail (1,186sqm), catered food premises (1,196sqm) department stores (2,039sqm) and bulky goods floorspace (322sqm). Whilst there will still be a net oversupply of retail floorspace, the provision of additional stores within these categories and within centres such as Manning Street, Tuncurry and Wharf Street, Forster (that are experiencing higher vacancy rates) will ensure a suitable range of retail is provided locally to meet the needs of residents and visitors.

Medium Term 2016 – 2021

By 2021 there will be sufficient demand generated for an additional 5,000sqm of retail floorspace. Whilst there will still be an oversupply of apparel, other non food retail and personal service related floorspace within Forster - Tuncurry there will be an undersupply (figures in red) in all other categories. This undersupply assumes there is no additional supply from the date of survey[25].

Of particular note will be the demand generated for an additional 2,400sqm of specialty foods stores, 2,200sqm of catered foods and close to 3,000sqm of department store floorspace. There will also be demand for 2,500sqm of bulky goods floorspace.

Long Term 2021 – 2031

By 2031 there will be demand for an additional 22,541sqm of retail floorspace within Forster - Tuncurry. This assumes that there is no additional retail supply from the time of this Strategy's retail floorspace surveys. Of particular note will be demand for an additional 3,300sqm of supermarket floorspace. This translates into demand for one large supermarket or 3 – 4 smaller supermarkets.

There will also be a significant undersupply in relation to department store space (5,200sqm) and bulky goods floorspace (7,600sqm). Whilst it is advisable to meet demand generated within a trade area in order to provide sustainable retail options for local residents, demand for department store and bulky goods floorspace has a wider catchment area. In other words shoppers are willing to travel greater distances to buy products from these stores. Consequently should it not be possible to meet this demand within Forster - Tuncurry, surrounding centres such as Taree could assist in meeting demand.

Non Retail Floorspace within Centres

Not all shopfront floorspace within a retail strip relates to retail uses. Uses such as real estate agents, banks, travel agents, dentists and post offices are classified by the ANZIC code as commercial.

With respect to shop front commercial floorspace, it is possible to estimate its growth in demand on a pro-rata basis with the growth in retail space. In high trading indoor centres commercial space occupies around 5% to 7% of specialties. In older indoor strip shopping centres the proportion may be as high as 40%, although 20% is more common.

[25] July 2008

9.8 Jobs by Store Type

Assuming the growth in demand for retail in Forster - Tuncurry can translate into businesses and supply within the centre, the approximate number of jobs that will be created in Forster - Tuncurry over the study period can be estimated.

Industry surveys of retail floor space suggest that 1 employee is generated for between 21sqm and 60sqm of retail floor space. The higher employee density (1 per 21 - 30sqm) generally relates to supermarket and grocery stores, small shops and personal services while the lower employee density (1 per 45 - 60sqm) relates to department and bulky goods stores.

Applying these rates to Hill PDAs floorspace forecasts results in demand for an additional 1,039 jobs in Forster - Tuncurry in the retail industry over the study period.

In total it is estimated that 2,574 jobs could be supported in the study area based on household and tourist generated demand.

Table 51 - Potential New Retail Jobs in Forster - Tuncurry 2006 – 2031

Retail Category	Yield sqm / person	Floorspace Demand 2031	Jobs Generated 2031	Net Floorspace Increase by 2031	Net Job Increase 2031
Supermarkets & Grocery Stores	40	15,317	383	6,097	152
Specialty Food Stores	30	7,199	240	2,865	96
Catered Food	30	12,569	419	4,958	165
Department Stores	45	12,567	279	4,802	107
Apparel	40	5,121	128	1,984	50
Bulky Goods Stores	60	25,319	422	10,913	182
Other Non-Food Retail	40	8,557	214	3,422	86
Selected Personal Services	30	4,284	143	1,938	65
Total		**90,931**	**2,228**	**36,978**	**903**

Source: Hill PDA Research ABS Retail Survey 1998/99

10. Forecasted Employment Growth

The following section discusses the forecasting of future demand for employment and employment generating lands in Forster - Tuncurry. Three different methods were tested by Hill PDA to identify the degree of employment growth likely to occur in Forster - Tuncurry over the 25 year study period. These methods include:

1. the definition of an aspirational target based on population growth;
2. the application of historical employment trends and market shares to future trends; and
3. the definition of an aspirational target based on a comprehensive review of the Study Area's strengths, opportunities, weaknesses and threats and in view of wider economic and employment trends.

The pros, cons and outcomes of each scenario are addressed below.

10.1 Scenario 1: Aspirational Target to Meet Population Growth

The first method for forecasting employment growth relates to the anticipated increase in population for an area and the associated growth in demand for employment. In the case of Forster - Tuncurry, the 2006 Census population count of 18,372 persons has been forecasted to increase to a population base of 26,650 persons by 2031 should the area achieve the anticipated growth rate of 1.5%[26] per annum over the study period.

Applying the existing labour force participation rate of 34% to the net increase in the number of new persons living within the Study Area, results in the need for 6,965 additional jobs to be provided in Forster - Tuncurry by 2031. It is important to note that this figure represents a 100% containment rate for all future residents – that is all future residents will seek work within the Study Area.

Furthermore this figure assumes that the workforce participation rate stays constant. We do not forecast any major shift to this demographic at this stage and have therefore adopted this figure as a target. Should lifestyle and work patterns change significantly in Forster - Tuncurry however a different rate could be justified.

For example, should Forster - Tuncurry seek to achieve a labour force participation rate that equates with the current rate for NSW (47%) the number of jobs that would be needed by future residents would be in the order of 12,525. This would have considerable implications for employment growth and place significant emphasis on the need to attract new businesses to the Study Area.

[26] Estimated population growth rate agreed with Council

10.2 Scenario 2: Historical Trends Analysis

The second method for forecasting employment growth for a Study Area is a review of historical employment trends and how they are apportioned by market share. We believe this method was utilised by the draft GLELS 2006 to forecast employment change in Forster - Tuncurry up to 2021.

The draft GLELS 2006 concluded that Forster - Tuncurry would continue to experience employment growth in the five key industries that experienced growth between the 1996 and 2001 census as follows:

1. Health and Community Services (29% increase in jobs);
2. Construction (18% increase in jobs);
3. Property and Business Services (16% increase in jobs);
4. Retail (12% increase in jobs); and
5. Accommodation, Cafes and Restaurants (1% increase in jobs).

The study predicted that Forster - Tuncurry would gain between 1,523 jobs and 1,953 by 2021.

We have used this method as one approach to predict employment growth. Our results using this method differ however from those of the draft GLELS 2006 for a number of reasons. Primarily the difference is because we have based our figures on the number of jobs generated within Forster - Tuncurry as opposed to the number of residents who live in Forster - Tuncurry and the jobs they are employed in. Secondly we have used the population growth rates supplied by Council as opposed to the Department of Planning (previously known as DIPNR). Lastly this strategy has a focus up to 2031 whereas the draft GLELS 2006 had a focus up to 2021.

The table below shows Hill PDA's approach which increases jobs in Forster - Tuncurry proportional to population growth whilst assuming a constant market share.

Table 52 - Job Growth Scenario 2 – Forster - Tuncurry 2006 – 2031

Industry Category	2006	2016	2031	Shift 06 - 31	% Shift
Agriculture, Forestry and Fishing	113	131	164	51	1.96%
Mining	-	-	-	-	0.00%
Manufacturing	297	345	431	134	5.14%
Electricity, Gas, Water and Waste Services	144	167	209	65	2.49%
Construction	416	483	604	188	7.20%
Wholesale Trade	87	101	126	39	1.51%
Retail Trade	1,038	1,205	1,506	468	17.97%
Accommodation and Food Services	704	817	1,021	317	12.19%
Transport, Postal and Warehousing	145	168	210	65	2.51%
Information Media and Telecommunications	41	48	59	18	0.71%
Financial and Insurance Services	142	165	206	64	2.46%
Rental, Hiring and Real Estate Services	181	210	263	82	3.13%
Professional, Scientific and Technical Services	232	269	337	105	4.02%
Administrative and Support Services	112	130	163	51	1.94%
Public Administration and Safety	380	441	551	171	6.58%
Education and Training	437	507	634	197	7.56%
Health Care and Social Assistance	885	1,027	1,284	399	15.32%
Arts and Recreation Services	124	144	180	56	2.15%
Other Services	269	312	390	121	4.66%
Inadequately described	30	35	44	14	0.52%
	5,777	**6,704**	**8,382**	**2,605**	

Source: Hill PDA, ABS Census 2006

As shown above, using this method we estimate that Forster - Tuncurry could experience a job growth of 2,605 by 2031. The main growth industries would include Retail Trade (468 jobs); Health Care and Social Assistance (399); Accommodation and Food Services (317).

Whilst there is no doubt that these industries will experience considerable growth over the study period, the apportion of growth for each of the 19 industries shown above is unlikely to reflect the changes of history. This is a result of new and emerging economic and employment trends that are occurring in NSW, Australia and globally (as discussed in Section 6) that will have a new influence on how we work and what industries we work in.

Hill PDA has researched the likely effect of these changes (the growth in household consumption; greater degree of international trade; the enhanced efficiencies of manufacturing and the growth in importance of the knowledge and innovation service industry) and how they are projected to affect job change in each category above. This information has been used to create a third and final option for forecasting job change in Forster - Tuncurry. This option is discussed below.

10.3 Scenario 3: Aspirational Target to Meet Market Share

The third scenario is a tailored scenario that has been prepared for Forster - Tuncurry. That is, we have adjusted forecasted industry growth and decline across each category based on our knowledge and research of Forster - Tuncurry. For example, we recognise that Forster - Tuncurry will be experiencing significant population growth over the study period. Coupled with increasing per capita consumption rates this trend relates in a greater market share of retail jobs for Forster - Tuncurry than historically.

Conversely the decline in the manufacturing industry has been held constant with state trends as Forster - Tuncurry does not have any exceptional circumstances to further hinder nor encourage the growth of this industry.

Assumptions

The table below highlights were these amendments have been made under the column 'assumptions'. Where the term 'Industry Review' has been used, we have based our growth rates on those advocated by the TDC Industry Review - Employment Forecasts Study 2006. This study analyses recommended forecast curves on an industry basis up to 2031. The study was prepared by reviewing historical industry employment data in NSW from the ABS Labour Force Survey and external forecasts of industry output and employment.

Where the term 'Population' has been used, we have assumed that the industry has a reasonable correlation with the demands generated from population growth. Consequently jobs within these categories have been adjusted with the same rate of increase (1.5% per annum) as population growth.

Where the term 'Direct User' has been applied this means that there is a strong correlation for the industry in question with the population growth rate (1.5% per annum) and the increase in household consumption (1.2% per annum).

Table 53 - Job Growth Scenario 3 – Forster - Tuncurry

Adjusted Market Share	2006	2016	2031	Shift 06 - 31	Market Share 2031	% Compound Growth	Assumptions
Agriculture, Forestry and Fishing	113	125	145	32	1.6%	1%	Industry Review
Mining	-	-	-	-	0.0%	0%	Industry Review
Manufacturing	297	297	297	-	3.3%	0%	Industry Review
Electricity, Gas, Water, Waste	144	167	209	65	2.3%	1.50%	Population
Construction	416	460	533	117	5.9%	1%	Industry Review
Wholesale Trade	87	91	99	12	1.1%	0.5%	Industry Review
Retail Trade	1,038	1,355	2,020	982	22.3%	2.70%	Direct user
Accommodation and Food Services	704	919	1,370	666	15.1%	2.70%	Direct user
Transport, Postal and Warehousing	145	168	210	65	2.3%	1.50%	Population
Information Media Telecomms	41	48	59	18	0.7%	1.50%	Population
Financial and Insurance Services	142	165	206	64	2.3%	1.50%	Population
Rental, Hiring & Real Estate	181	210	263	82	2.9%	1.50%	Population
Professional, Scientific, Technical	232	269	337	105	3.7%	1.50%	Population
Administrative and Support Services	112	130	163	51	1.8%	1.50%	Population
Public Administration and Safety	380	441	551	171	6.1%	1.50%	Population
Education and Training	437	507	634	197	7.0%	1.50%	Population
Health Care & Social Assistance	885	1,027	1,284	399	14.2%	1.50%	Population
Arts and Recreation Services	124	162	241	117	2.7%	2.70%	Direct user
Other Services	269	312	390	121	4.3%	1.50%	Population
Inadequately described	30	35	44	14	0.5%	1.50%	Population
	5,777	**6,888**	**9,056**	**3,279**			

Source: Hill PDA, ABS 2006, TDC 2006

The table shows that for the Study Area, based on the above assumptions, it is reasonable to forecast that jobs will grow in the order of 3,300 by 2031. This represents a 57% increase. This forecast is considered the most appropriate to use for this strategy. These results have therefore been used in any future analysis.

11. FUTURE SUPPLY & DEMAND ANALYSIS

In light of the research, analysis and consultation results discussed in the preceding sections, the following section summarises the implications of the employment supply and demand estimates and how this translates into floorspace and site area.

11.1 Demand for Retail Floorspace

Hill PDA's expenditure modelling has identified demand for an additional 22,500sqm of retail floorspace by 2031. For the purposes of comparison this represents an additional centre the size of Wharf Street, Forster.

This Strategy does not recommend the creation of one large, new centre in the Study Area to accommodate this demand. Rather we recommend the strengthening and consolidation of existing centres in accordance with the visions outlined in Council's Urban Density and Design Review 2008. Notwithstanding this recommendation, an additional small centre will be required on the North Tuncurry Crown Land site (subject to its development) to meet the convenience retail needs of the future community to be based there and reduce their need to travel regularly to larger centres.

The following section outlines the implications future demand for retail may have to Forster - Tuncurry's centres and makes recommendations as to centres that should be expanded. It also provides recommendations with respect to their potential roles within the future Centre hierarchy.

At present retail supply exceeds demand generated within Forster - Tuncurry as it draws on trade from surrounding areas. This predicament has been supported by the recent expansion of the Stockland shopping centre. By 2016, the Study Area will not require any additional floorspace overall, however the oversupply in some retail categories will mask the need for an additional 1,800sqm of specialty stores, 1,196sqm of catered food and 2,989sqm of department store floorspace.

It is recommended that the strength of the existing village centres (Wharf Street, Forster and Manning Street, Tuncurry) is enhanced through their promotion as locations for the additional specialty store and restaurant / café floorspace. This will assist in reducing the existing vacancies and also help to accommodate the tourist demand for these services.

Whilst the Manning Street, Tuncurry Centre would benefit significantly from an additional anchor store such as a 3,000sqm discount department store (Kmart, Target, Big W) our discussions with retailers have identified significant constraints to developing a large retail store in the centre is site fragmentation. It is difficult to amalgamate sites resulting in delays and additional development costs. The rezoning of land surrounding the centre is one option to address this constraint, the pros and cons of which will be discussed in greater detail in later sections of the Strategy.

Feedback from retailers, as a result of stakeholder consultation, highlighted that the land within and surrounding the existing Breese Parade Centre is the preferred centre in the Forster – Tuncurry Study Area given the larger parcels of landownership (particularly Pipers Creek) and the trade benefits of clustering with other major retailers. In planning terms we recommend that a larger anchor store is prioritised and encouraged for development within the Manning Street, Tuncurry Centre although a proposal for this type of retail could also be acceptable in economic and planning terms in the Breese Parade Centre.

By 2021 and 2031 there will be significant demand for additional bulky goods premises. This retail category has a large trade area and therefore it is not critical for all of this floorspace to be provided within the Study Area. Bulky goods are however a good generator of employment and 7,500sqm of floorspace could translate into approximately 185 local jobs. It is therefore recommended that this use is supported within the recommended B5 Business Development Zones discussed further in the proceeding section.

By 2031 there will also be additional demand for 3,300sqm of supermarket floorspace. The provision of this floorspace should be actively encouraged in Tuncurry Village in order to support the viability of the centre through an additional anchor store or a major extension to the existing anchor. At this time it may also be appropriate for a small supermarket (under 1000sqm) on the North Tuncurry Crown Land to be supported by additional specialty stores (i.e. 1,500sqm) with the remaining portion directed to centres such as Forster Keys and Forster Waterside.

Table 54 - Forecast Change in Demand for Retail Floorspace (sqm) by Category 2006 - 2031

Retail Category	2006 Demand	Additional Required	2016 Demand	Additional Required	2021 Demand	Additional Required	2031 Demand	Additional Required
Supermarkets & Grocery Stores	9,220	2,780	11,226	774	12,427	- 427	15,317	- 3,317
Specialty Food Stores	4,333	- 873	5,276	- 1,816	5,840	- 2,380	7,199	- 3,739
Catered Food	7,610	440	9,246	- 1,196	10,223	- 2,173	12,569	- 4,519
Department Stores	7,764	- 424	9,379	- 2,039	10,329	- 2,989	12,567	- 5,227
Apparel	3,137	2,383	3,801	1,719	4,194	1,326	5,121	399
Bulky Goods Stores	4,406	3,344	18,072	- 322	20,232	- 2,482	25,319	- 7,569
Other Non-Food Retail	5,135	4,765	6,272	3,628	6,948	2,952	8,557	1,343
Selected Personal Services	2,345	2,025	2,987	1,383	3,369	1,001	4,284	86
Total Retailing	**53,952**	**14,438**	**66,257**	**2,133**	**73,563**	**- 5,173**	**90,931**	**- 22,541**

Source: Hill PDA

Note: Red colour indicates undersupply. Blue oversupply.

11.2 Demand for Commercial Floorspace

Consistent with trends in the New Economy, Forster - Tuncurry will experience a significant growth in demand for commercial floorspace over the study period. As shown below, this growth translates into demand for an additional 19,500sqm of floorspace. In accordance with the recommendations of the Urban Design and Density Review 2008, we have applied an FSR of 1:1 for commercial uses in town centres.

The main industry of growth will be public administration and safety. This industry relates to the former business service category and includes a range of personal and business services (i.e. solicitors, financial consultants etc). This industry is experiencing rapid growth across NSW with changes in how we work and live. This use is well suited to town centres such as Tuncurry that are centrally located and accessible to the community as part of a wider household shopping trip.

The second largest commercial category of growth is forecast to be professional, scientific and technical services. The growth of this industry is a result of global trends as well as aspirations for Forster - Tuncurry to become a regional focus for innovation, research and sustainability. The majority of these jobs should be located within the Study Area's centres such as Tuncurry to reinforce their commercial roles however it may also be prudent to allow a component of this floorspace to form a cluster with the TAFE. This cluster must not however adversely affect the economic function of the Manning Street, Tuncurry centre.

Another sizeable growth industry will be rental, hiring and real estate services. The growth of this industry corresponds with the tourist industry as well as the development industry. Both of which are forecast to grow over the study period. A minor component of this commercial floorspace may be required as ancillary space to transport and distribution facilities located within industrial lands.

Table 55 - Forecast Change in Demand for Commercial Floorspace (sqm) by Category 2006 - 2031

Commercial	Yield*	2006	2016	2031	Additional Floorspace 2031	Additional Land FSR 1:1
Financial & Insurance Services	30	4,260	4,944	6,181	1,921	1,921
Rental, Hiring & Real Estate	40	7,240	8,402	10,505	3,265	3,265
Professional, Scientific, Technical	40	9,280	10,770	13,465	4,185	4,185
Administrative & Support	30	3,360	3,899	4,875	1,515	1,515
Public Administration & Safety	50	9,000	22,050	27,568	8,568	8,568
Total		**43,140**	**50,066**	**62,594**	**19,454**	**19,454**

Source: Hill PDA, TDC 2006

Note red colour indicates undersupply or unmet demand

*Sqm / Person

11.3 Demand for Industrial Land / Floorspace

Based on our employment projections, we estimate Forster - Tuncurry will require an additional 17,900sqm of industrial floorspace. At an FSR of 0.5:1 this translates into demand for approximately 4ha of additional industrial land over the study period. At a perhaps more applicable FSR for regional centres of 0.35:1 this site area demand increases to 5ha.

Consistent with Australia wide trends, we do not forecast Forster - Tuncurry will require a growth in demand for industrial land relating to manufacturing. Unlike many regions across NSW however, Forster - Tuncurry is not anticipated to experience a decline in demand for floorspace of this nature. This is because we believe the local manufacturing industry provides an important local service for Forster - Tuncurry. Furthermore some employment may be generated in this industry (to offset the losses) in light of visions for Forster - Tuncurry to become a centre of excellence for sustainability and innovation (to be discussed further in later sections of this report).

The main area of growth for employment lands relates to the transport, postal and warehousing category. Again this trend is consistent across NSW. Construction will remain a dominant industry, however the scale of demand is anticipated to be lower (at least in the short term) owing to the comparative softening of the property market compared to the past few years.

Table 56 - Forecast Change in Demand for Industrial Floorspace (sqm) by Category 2006 - 2031

Industrial Category	Yield*	2006	2016	2031	Additional Floorspace 2031	Additional Land FSR 0.5:1	Additional Land FSR 0.35:1
Manufacturing	100	29,700	29,700	29,700	-	-	-
Electricity, Gas, Water & Waste	50	7,200	8,356	10,447	3,247	6,494	9,277
Construction	50	20,800	22,976	26,675	5,875	11,749	16,785
Transport, Postal and Warehousing	120	17,400	20,193	25,246	7,846	15,693	22,418
Information Media & Telecommunications	50	2,050	2,379	2,974	924	1,849	2,641
Total		**77,150**	**83,605**	**95,042**	**17,892**	**35,785**	**51,121**

Source: Hill PDA, TDC 2006

* Note red colour indicates undersupply or unmet demand

*Sqm / Person

11.4 Special Uses

There are a range of employment generating uses within Forster - Tuncurry that do not fall within the retail, commercial or industrial categories. We have grouped these together under the term 'Special Uses'. The nature of these uses and their space requirements vary significantly however across each category.

Special Uses relate to educational institutions (i.e. primary and secondary schools, the TAFE); hospitals; medical centres; health related uses; community centres; halls and convention spaces.

By 2031 it is estimated that Forster - Tuncurry will require an additional 51,000sqm of space relating to these uses. As Special Uses generally have a lower density of buildings, we have applied an FSR of 0.5:1 to estimate demand for an additional 102,000sqm of site area (or 10ha) by 2031.

Health Care and Social Assistance

Significant demand for floorspace and in turn site area will occur as a result of the increase in demand for Health Care and Social Assistance. The substantial growth forecast in these industries is a direct result of the significant anticipated growth in the population and the high proportion of the population over the age of 65 years.

Forster - Tuncurry presently has a central medical area known as the Forster Medical Precinct. The Precinct provides a wide range of hospital related services and is supported by general practioners, family medical centres and allied health services. Combined there was eight medical establishments within this precinct at the time of survey.[27]

[27] September 2008

Outside of the Forster Medical Precinct, surveys have identified a number of other health related industry clusters. These clusters are focused around:

- Wharf Street Village including Wharf Street, Memorial Drive, Lake Street and Macintosh Street. Surveys indicate eight premises including doctor's surgery's, chiropractors, dentists, optometrists and naturopaths. Five of the eight establishments are located within the designated village centre, the remaining three are located within the surrounding residential zones;
- the junction of Mark Street, Kularoo Drive and Macintosh Street. Five health related establishments are located in this cluster including a chiropractor, medical centre and podiatrist. Each of the establishments are located within residential zones;
- Breese Parade, The Lakes Way and Stockland shopping centre. Five health related establishments are located in this cluster including a community health centre, doctor, optometrist and physiotherapist. These establishments are located within three different planning zones – special uses, residential and business; and
- the junction of Manning Street, South Street and Beach Parade as well as the junction of Taree Street and Manning Street. Eight establishments are located within this cluster including chiropractors, pathology, physiotherapists, doctors and dentists. With the exception of one building, all of these establishments are located within the designated Tuncurry centre business zone.

Combined, the Study Area provided 34 health related facilities at the time of survey (2008). Just under half (or 16) were located within residential zones indicating that these uses do not need to be located within employment lands as they are generally compatible with residential uses. The location of medical related uses outside of constrained employment lands has assisted in reducing competition for space.

Notwithstanding this, their location within centres such as Breese Parade, Forster or Tuncurry should be encouraged in order to add vitality to the street scene and create a greater range of services within the one destination thereby reducing the need for travel. These centres are not constrained at present for space with a number of vacant units that could be utilised by future medical uses. Furthermore, given that many of the existing premises are located within residential zones, there is scope to increase the intensity of use to facilitate greater provision on these sites in the future to meed demand. An example of where this growth could occur is the Forster Medical Precinct.

Education and Training

Over the study period significant growth will also occur in education and training related jobs and services. This relates to changes in how we work and the growth in the number of people undertaking additional studies to meet business demand. The growth of this industry should be strongly encouraged in Forster - Tuncurry in order to provide opportunities for younger residents to remain living in the area whilst learning. The growth of this industry should also be encouraged to support the ongoing training and skill development of Forster - Tuncurry's workforce. Mechanisms to support this industry are discussed further in Section 12.

Arts and Recreation

Greater demand for 11,700sqm of floorspace and 23,500sqm of site area is also forecast to occur in the arts and recreation service industry. This growth in demand relates to the increase in the population as well as tourist industry. Similar to education and training it is considered an important factor for Forster - Tuncurry's economy and lifestyle and should be strongly supported. Reasons to justify this are discussed further in Section 12.

Table 57 - Forecast Change in Demand for Special Uses by Category 2006 – 2031 (sqm)

Special Uses	Yield*	2006	2016	2031	Additional Floorspace 2031	Land FSR 0.5:1
Education and Training	80	34,960	40,573	50,725	15,765	31,530
Health Care & Social Assistance	50	44,250	51,354	64,204	19,954	39,909
Arts and Recreation Services	100	12,400	16,186	24,137	11,737	23,474
Other Services	30	8,070	9,366	11,709	3,639	7,278
		99,680	**117,478**	**150,775**	**51,095**	**102,191**

Source: Hill PDA, TDC 2006

* Note red colour indicates undersupply or unmet demand

*Sqm / Person

Regrettably a detailed floorspace survey of existing land occupied by Special Uses in Forster -Tuncurry was not part of the Strategy's brief. Given the important role these uses play in generating employment and their significant demand for land however, we have estimated the growth in demand for floorspace and site area based on forecast job growth.

To assist in planning for this land over the study period, we recommend a survey is undertaken of existing land occupied by Special Uses. This will help to identify if there is an existing under / over supply and how this will affect the net growth in land required.

Part D - Implementation Strategy

12. MECHANISMS TO ATTRACT BUSINESS

A key objective of the Strategy is to identify and recommend mechanisms that could be used to attract a diverse range of employment generating businesses to Forster - Tuncurry. In this section we identify a range of fiscal, social, planning and marketing mechanisms to achieve this objective. The mechanisms have been derived from the analysis undertaken in earlier sections of the strategy including a review of the Study Area's competitive advantages and weaknesses. The mechanisms were also identified based on research and industry consultations that have highlighted critical factors for business success.

Forster - Tuncurry has many attractive features for businesses including its lifestyle attributes, established tourist industry and growing population. Weaknesses were however associated with its low labour force participation rate, the loss of younger workers to larger centres and constrained industrial land supply. These strengths and weaknesses and the opportunities or threats they create are discussed further below.

Forster - Tuncurry's Strengths

- **Attractive Physical Environment** – an asset to be protected as it supports the tourist industry and the lifestyle merits of the area;
- **Improved Highway Accessibility** – upgrades to the Pacific Highway have reduced travel times to cities such as Sydney to the south and Brisbane to the north as well as Regional Centres such as Newcastle and Port Macquarie;
- **Population Growth -** Forster - Tuncurry has been identified by the Department of Planning as a Major Town in the Mid North Coast Region suitable for considerable population growth and urban development;
- **Track Record of Environmental Success –** the Council has successfully enhanced the environmental quality of Wallis Lake. This success with environmental rehabilitation and management can be built on so that the Council is promoted as an expert in the field of water quality. This success also creates opportunities to attract industries looking to associate with, and build on, this environmental good news story;
- **A High Rate of Home Working –** this strength creates an efficient use of resources and minimises adverse impacts to infrastructure;
- **Established Centres** – Forster - Tuncurry is a Major Town Centre with a range of retail and commercial services that act as magnets for shoppers and similar businesses to support the economy;
- **Proactive Council and Business Community** – Council, in partnership with the community, is dedicated to actively promoting and enhancing Forster - Tuncurry. Council has established mechanisms and resources such as an Economic Development Officer and associated programs to prioritise business and employment growth in accordance with community needs;

- **Established Tourist Industry and Facilities** – Forster - Tuncurry is a widely recognised tourist destination with established infrastructure and facilities. There are future opportunities to enhance this industry through the promotion of local events and the attraction of more tourist related facilities and services; and
- **Mature Population** – Forster - Tuncurry has a wealth of older residents that can offer younger members of the community business knowledge and experience. These members may also have reduced time constraints and greater resources to support the implementation of Council objectives.

<u>Forster - Tuncurry's Weaknesses</u>

- **Seasonal Tourism Fluctuations** – having one of the Study Area's main industries being heavily reliant on a small seasonal window increases demand on infrastructure and services and reduces the spread of employment opportunities and income over the year to the disbenefit of the local community. Furthermore, the implications of a bad season can't be rectified until the next season starts which is almost a year later;
- **Dependence on Retail Jobs** – it is estimated that 19% of jobs within Forster - Tuncurry relate to the retail industry. This creates a high dependency and vulnerability in less affluent economies;
- **High Land Values** – Forster - Tuncurry land values are comparatively high, therefore reducing the ability for businesses to develop over larger sites;
- **Road Access and Signage** – between Forster - Tuncurry and the Pacific Highway, road access is hindered by roads in need of repair and upgrade. Signage from the Pacific Highway to signal the main turnoff to Forster - Tuncurry is small and easily missed, thus reducing the potential for passing tourist related business and also reducing the impression of the centre as a place of prominence;
- **Distance from the Pacific Highway** – the travel distance and time off the highway further reduces the prospect of passing trade. It also makes the centre an undesirable location for businesses reliant on fast and convenient access to regional or state wide markets;
- **Constrained Land and Land Banking** – the availability of zoned employment lands is constrained in some cases by residential uses or environmentally sensitive lands. There are also a number of key sites within the centre in private ownership that have not been developed as yet and therefore restrict the employment generating potential of zoned employment lands;
- **Available Workforce** – Forster - Tuncurry has a low labour force participation rate reducing the pool of available workers, particularly younger workers. This reduces the attraction for businesses to locate within the area; and

- **Environmental Sensitivities –** whilst the natural asset of Forster - Tuncurry is a major strength, it can also be a weakness as it reduces the development capacity of some key sites and can add to the cost of development.

12.1 Mechanism 1: Develop a Point of Difference

The Mechanism: *to create a point of difference for Forster - Tuncurry that distinguishes it from other coastal areas and attracts desirable businesses.*

Intended Outcome: a *unique selling point for Forster - Tuncurry that attracts desirable business clusters.*

As a primary overarching Mechanism to attract business, we recommend that Forster - Tuncurry builds on its existing strengths to create a point of difference. By this it is meant that Forster - Tuncurry needs to distinguish its merits from other coastal centres in NSW to attract business. Forster - Tuncurry should unequivocally highlight the value, merits and economic good sense of locating a business within its centres and employment precincts over centres and employment precincts in other LGAs and Regions.

During community consultation, excitement has been raised in relation to the concept of Forster - Tuncurry being promoted as a sustainable community. This concept of sustainability is widely used in today's media and business world, yet little understood or practiced. What is clear however, is the growing need for sustainability to become higher on our community agenda to ensure a quality of life and environment for our futures and children's futures.

Forster - Tuncurry is well placed to build on this concept as its point of difference. Forster - Tuncurry has a high quality natural environment that should be recognised as an economic asset to be protected. The natural environment facilitates major industries in Forster - Tuncurry such as tourism, aquaculture and agriculture and supports the vision for growth by creating a positive lifestyle factor.

The quality of Forster - Tuncurry's natural environment is not however, unique to the Study Area as there are numerous coastal localities in Australia that rely on the quality of their natural environment for tourism and other economic industries. To distinguish itself, Forster - Tuncurry needs to build on this strength with other local assets to create a truly unique point of difference.

One factor in this respect is Forster - Tuncurry's success in addressing major environmental issues associated with pollutants in Wallis Lake. The Council, in cooperation with stakeholders, has remedied the pollutants in Wallis Lake creating one of the cleanest lake ecosystems in the State. This success is being promoted and can become a success story to be built upon and attract industries looking to learn about the issue and research it further.

Council's environmental rehabilitation success may be coupled with the existing number of environmental businesses located within the Forster - Tuncurry area. Together these industries could create a recognised cluster or specialised centre for environmental design, research and innovation. These industries could focus on best practice methods to develop in an environmentally sound way that is not only sustainable from an environmental point of view but also from an economic and social perspective.

It is recommended that Forster - Tuncurry strives to become the 'Centre of Excellence' in NSW, and in turn Australia for environmentally sustainable industries. To achieve this however, there needs to be a joint relationship with the TAFE and potentially a link with the University of Newcastle. The prospects for this are discussed further under Mechanism 5.

The sustainability concept could also work cooperatively with the Tourist industry by broadening the scope of activities available for tourists to include Eco visits or tours of the Marine Park, National Parks and Lakes. This could have flow on benefits to all of the tourist related industries including accommodation, restaurants and boat hire. The relationship of this idea to tourism is discussed further under Mechanism 3.

The range of opportunities for Forster – Tuncurry, in relation to sustainability, are far reaching. For this reason, Mechanism 1 is considered the primary or overarching Mechanism for Forster - Tuncurry.

Flowing from Mechanism 1 some additional key ideas have been raised during stakeholder consultation to support the attraction of business including:

- Forster - Tuncurry becomes the focal point for research into clean energy sources. The Hunter Region is traditionally known for its coal and mineral production and exporting for fuel. Forster - Tuncurry could create a shift change in this approach by becoming the leader in research and innovation for 'clean' energy. This approach could be kick started by building a relationship with the CSIRO's Energy Technology Centre based in Newcastle. The centre has been established to research cleaner fuel options relating to coal and has established space and equipment to research these matters. Forster - Tuncurry could extend the research however to other sustainable energy systems such as solar panels, wind and tidal power;
- Forster - Tuncurry's promotion as a sustainable community that lives and works within close proximity thereby reducing the need for travel by car and other unsustainable methods;
- Forster - Tuncurry's promotion as a centre for organic and environmentally sustainable primary production. This could relate to the growth in oyster production in Wallis Lake and agricultural farming on rural lands in South Forster;
- Regular events or fairs for sustainable ideas building on the 'Small Footprint Initiative';
- Research and innovation centres for energy minimisation and sustainable building mechanisms with tangible examples provided locally by residential and mixed use developments;
- The development of an 'eco business centre' or 'sustainable economic centre'. The centre would facilitate the clustering of sustainable businesses in agreed areas such as Tuncurry or Pipers Creek or sustainable light industries in the Tuncurry Light Industrial Area or Council Depot Site. The centre could advocate sustainable building and business operation methods (i.e. waste recycling, energy minimisation, water recycling) to complement the nature of businesses located there; and

- The promotion of creative industries and the provision of public art created by local artists. This public art can be used to not only enhance the public environment (such as Wharf Street or public parks / walkways) but also emphasise Forster – Tuncurry's point of difference and sustainable focus i.e. through the recycling of materials or artistic themes.

It may be argued that a number of the ideas discussed above would not be viable in their own right for the Forster-Tuncurry Study Area. This is a result of the smaller scale of the Study Area and therefore the lower level of demand / usage to warrant this scale of research, development and investment for the area exclusively. Despite this however, the concept would allow the Study Area to become a centre of excellence and research for a far wider area of influence not limited to the Mid North Coast and Lower Hunter Region's but extending to NSW and in turn Australia.

For Mechanism 1 to be successful it has to be shared with the wider community, resourced by a mix of both government and private organisations, endorsed by Council and promoted across all that they do. We suggest that Council leading by example is the first step to implementation. Furthermore success is dependent on how prominent the message is in the minds of not only the Forster - Tuncurry community but wider NSW. This prominence is critical to attracting business awareness and in turn prospective interest. To address the two critical matters of business awareness and interest we recommend:

- As a first step, Council engages the local community through a series of public workshops, to clarify and agree what sustainability means for Forster – Tuncurry. This consultation process should include Council officer and member briefing sessions;

- As a second step, it is recommended that Council updates all relevant existing plans, strategies and other public documents to incorporate the sustainability vision for the Study Area. Council should consistently incorporate the idea in all future documents and policies;

- As a third step we recommend Council undertakes an education program for the wider business and resident community of what sustainability means and how it can positively influence them;

- Another important initial stage in implementing this mechanism will be the investigation of fiscal mechanisms to assist sustainable businesses to relocate to the area, or for existing business to grow in a sustainable way. Mechanisms may include Council rate exemptions, payroll tax exemptions and business support grants for desirable industries that implement the policy. These approaches are discussed further under Mechanism 9;

- As a longer term, but important option, we recommend Council's commitment to sustainability is visually presented and endorsed with an iconic development such as a wind farm on Councils' Waste Management Centre site in North Tuncurry at the gateway to the area; and

- Following the preceding steps, Council and associated organisations actively market and brand the concept across NSW. This prospect is discussed further under Mechanism 12.

Lastly, we recommend that Council's sustainability vision and point of difference is seen as a positive for businesses and not a cost. New employment generating businesses should not be dissuaded from locating in Forster - Tuncurry because they are not sustainable in their approach, nor should businesses be penalised for not adopting sustainable mechanisms. This approach would adversely affect employment opportunities for Forster - Tuncurry.

Rather, businesses should be encouraged through fiscal or other incentives (i.e. development incentives and business awards) to adopt sustainable development and operational methods. Furthermore, businesses should be educated through Council's sustainability workshops as to the effective costs savings that can be gained from sustainable design and operational mechanisms.

12.2 Mechanism 2: Sustainable Health and Living

The Mechanism: *to balance the concept of sustainability so that it includes lifestyle and healthy living options in addition to the environment and economy.*

Intended Outcome: a *healthy and happy community that attracts businesses as a result of the health of the labour force and quality of the living and working environment.*

As outlined above, sustainability does not only relate to the environment but also lifestyle. This report has highlighted that Forster - Tuncurry has a very high proportion of its community in the over 65 year category. This proportion is forecast to grow to 40% of the population over the study period. Forster - Tuncurry could capitalise on this trend and link it with the 'centre for sustainability concept' by promoting sustainable living and health.

Our stakeholder consultation has highlighted that the health and happiness of the Forster - Tuncurry community is one of the key attractions of doing business in the area. Consequently the matter of sustainability could extend from an environmental one, to a health and lifestyle one.

Forster - Tuncurry could continue to promote the sustainability of its lifestyle through reduced work related stress, greater health care and illness prevention as well as the production of quality organic foods. A more rounded approach to health and preventative 'ageing' could be reinforced and continue to be promoted.

The existing health precinct could be enhanced with the provision of dieticians, naturopaths and other new age medical approaches to improve quality of life. Local farmers and food industries could continue to promote their local produce and sustainable farming methods. Local fitness specialists could promote the benefits of all grades of physical activity and getting out to exercise in the natural environment. The latter could continue to be promoted by the attraction of major sporting events to the Study Area such as triathlons, adventure races, surf carnivals, rowing regattas and community fun runs / walks.

In this way Forster - Tuncurry could become increasingly recognised as a sustainable centre that promotes healthy eating, physical activity and quality living rather than becoming 'heavens waiting room'. Forster - Tuncurry could become a place to live, work or holiday where you not only feel good about what you do for the environment, but also feel good about yourself and your lifestyle choice.

12.3 Mechanism 3: Broaden the Tourist Industry

The Mechanism: *to extend the tourist season so that it can attract a broader range of visitors and spread the economic flow on benefits to associated industries over a greater period of the year.*

Intended Outcome: *an extended tourist season with a range of activities and attractions that encourages new visitors, a greater number of visitors and repeat visitors.*

Tourism is a key industry for Forster - Tuncurry that has supported the Study Area's growth into a Major Town Centre in the Region. It is also an industry that has numerous economic flow on benefits including greater retail expenditure and demand for goods and services. The industry's positive influence on employment generation is therefore widely recognised.

Stakeholder consultation and information reviews have highlighted however that tourism in Forster - Tuncurry is highly seasonal. For example, the 2007 / 2008 season owing to poor weather conditions, was reduced to a three week window.

An intense yet short tourist season places great strain on businesses to employ staff, train them and maximise trade in a short period, surviving off the proceeds for the rest of the year. In turn it places great strain on employees who may be only required a few weeks a year and then experience difficulty finding suitable employment for the remaining portion of the year.

The seasonal nature of the tourist industry also constrains infrastructure (roads, bridges, council services) that are not designed to cater to such significant increases in patronage or usage for short period. Conversely such infrastructure can become oversupplied / inefficient the remaining portion of the year.

To address these issues, the 'shoulders' of the tourist season must be broadened. Similar to summer months in well established tourist destinations such as Jindabyne Ski Resort, Forster - Tuncurry must ensure a range of activities and attractions for visitors during the winter months. The limited range of activities presently offered within the Study Area has been highlighted by stakeholders as a major constraint to this objective.

In order to implement this mechanism we recommend a range of immediate and longer term options as follows:

- Build on the strengths of local industry and trade. This is a cost effective option that can be implemented in the short term. For example tourists could be attracted to Forster - Tuncurry to sample the local oysters and wine, while dining at restaurants overlooking Wallis Lake's entrance, similar to how tourists are attracted to seafood and chips in Port Stephens or Coffs Harbour. To implement this mechanism it will be critical to engage local industries, ensuring they 'sign up' to the strategy and the local produce concept. Local industries will need to include both suppliers (i.e. oyster farmers, honey and wine producers) as well as distributors (cafes, restaurants and tourist information services);

- Continuing to build on the strengths of the natural environment through outdoor fitness events, markets and fairs that attract a greater number of people to the area for reasons other than summer holidays;
- The enhanced promotion of Forster - Tuncurry as a holiday destination across NSW through the media as well as a destination to enjoy a sustainable lifestyle, the outdoors and quality local produce such as wine and oysters. Whilst Council's Marketing and Tourism Manager has implemented this first step, we recommend that in the short to medium term, Council prepares and implements a major marketing scheme in conjunction with the Mid North Coast Regional Tourism Organisation. A major scheme will need to secure a reasonable marketing budget to capture a wide audience with an effective message. Council should investigate options for grants or funding sources from government organisations such as the Department of State and Regional Development to support this step and its implementation;
- A longer term option is the extension and enhancement of the marina to meet the needs of larger and additional boats including new toilet and shower amenities, cafes and marine related retail; and
- As a last step we recommend a synergy is created with the mechanisms discussed above, tying in the Forster - Tuncurry sustainability point of difference and promoting ecologically sound tourist accommodation and activities / education.

Each of these options not only has positive benefits for direct tourist related jobs (accommodation, car or boat hire, restaurants and cafes) but other indirect industries such as agriculture, aquaculture, business and personal services.

12.4 Mechanism 4: Access

The Mechanism: *enhance the perception of unconstrained access within Forster - Tuncurry and to surrounding centres.*

Intended Outcome: *suitable local and regional access that minimises business costs and maximises business opportunity.*

This mechanism seeks to improve the perception of access to, and within Forster – Tuncurry, and to other regions. We recommend three key components to implement this mechanism including:

1. The promotion of the significant improvements committed to by the State Government to the Pacific Highway and the benefits this will have for businesses. To attract businesses to the Study Area it will be critical to ensure they are confident of Government commitments to fund road and transport infrastructure. Actions speak louder than words. Benefits for business will not only relate to improved distribution of goods from Forster - Tuncurry to markets outside of the Study Area but also improved ease

of access for additional tourists to Forster - Tuncurry. To implement this option in the short term we recommend 'good news' stories or road upgrade progress updates are included on the Council website, community noticeboard and in information packs to local businesses. These details could also be included in welcome packs for businesses considering relocating in the area;

2. Identify and implement a mechanism to address congestion at peak times / seasons on the Wallis Lake Bridge. Council needs to be seen as actively addressing the issue to reduce constraints for businesses in Forster and South Forster. Options include the lobbying of Government for funding; the promotion of greater traffic generating development in Tuncurry (as opposed to Forster) and the promotion of a modal shift to more sustainable travel mechanisms such as walking to reduce car usage. The latter can be supported through an active policy of promoting employment opportunities in close proximity to employee housing, subsidised employee travel, the greater frequency and availability of public services; and

3. Promote the accessibility of Taree airport and its daily connections with Sydney Airport thus further reducing travel times. A connection via regular and reliable public transport or shared taxi services must however be established and advertised.

12.5 Mechanism 5: Education & Training

The Mechanism: *enhance opportunities for younger residents to continue to live in Fortser Tuncurry whilst continuing their education and expanding their skill set. Promote life long learning opportunities and re-skilling for existing residents.*

Intended Outcome: *Forster - Tuncurry becomes a focal point in the Great Lakes LGA and the Mid North Coast for education and training in relation to environmental, economic and social sustainability with future employment prospects.*

As discussed under Mechanism 1, we believe Forster - Tuncurry should strive to become the 'Centre of Excellence' in NSW (and in time Australia) for environmentally sustainable industries. To achieve this however there must be a joint relationship with the TAFE and potentially a link with the University of Newcastle.

Our consultation with the TAFE has highlighted an interest in expanding the campus and fostering a better relationship with the universities. A satellite university campus could be developed in Forster - Tuncurry in association with the TAFE, with support and joint working from Government Departments and the Council as a centre for environmental studies.

By way of example, a similar partnership has been adopted in Port Macquarie between the University of Newcastle, Southern Cross University, the North Coast Institute of TAFE and Port Macquarie-Hastings Council. The partnership has meant that students can gain Bachelor degrees in Business, Nursing, Information Technology and Education from the TAFE campus in Port Macquarie.

Combining these institutions could create the Forster - Tuncurry 'Sustainability Campus' for ongoing education, research and innovation.

The prospective benefits of additional or extended education in Forster - Tuncurry are numerous. Firstly the promotion of ongoing learning and local post school education opportunities will assist in improving the skills of the local workforce to the benefit of the businesses that employ them.

Secondly it would assist in creating a reason for younger members of the community to stay within the area and provide prospects of employment or career growth should they wish to return after working or studying in other regions. Sustainability is a growth industry of interest to younger generations.

Thirdly, it would attract knowledge workers and research grants that would increase opportunities for employment and raise the profile of Forster - Tuncurry as a desirable place to live and work.

Our experience with the prospective development of tertiary institutions has found that location is an important factor for students. Students seek attractive and fun locations with a range of activities. The Study Area can cater to many outdoor activities enjoyed by students however the strength of its 'nightlife' or social infrastructure will need to be enhanced to ensure Forster - Tuncurry becomes an attractive study destination for students.

12.6 Mechanism 6: Government Support for Forster - Tuncurry

The Mechanism: *to promote government support for services in Forster - Tuncurry in light of its designation as a place of significant urban growth.*

Intended Outcome: *Forster - Tuncurry maintains its 'Market Share' of state and local government services with respect to its population share.*

As a magnet for employment growth and business relocation, State and regional government organisations should make a policy commitment to employment growth in Forster - Tuncurry. The centre is the main centre for Great Lakes LGA and as such should maintain its market share (set by its population base) of public administration and civic jobs.

This will include but not be limited to:

- health and educational services;
- government administration;
- state services including police and community health;
- government business enterprises including RTA and planning;
- tertiary education;
- arts and culture;
- recreation; and

- science and technology government funded projects.

In some cases like the Arts and Culture there is an argument to support an increase above the Study Area's population growth given the prominence of its tourist industry.

Government policy has already identified Forster - Tuncurry as a major area for growth in the Mid North Coast Region. Accordingly due support should be given through policy and funding to enhance employment opportunities for this growth and associated service need. Options to achieve this are discussed further under Mechanism 9.

It is important to note that whilst Government support is strongly encouraged, it will be necessary to ensure that assistance does not distort the allocation of resources across the Mid North Coast Region. A careful assessment of the implementation of the support options to be discussed in greater detail under Mechanism 9 should be soundly based and not adversely affect the economic development of surrounding LGAs.

12.7 Mechanism 7: Subsidised Workspace

The Mechanism: *provide a range of employment floorspace including subsidised or sub market rent.*

Intended Outcome: *a culture of support for starter businesses that attracts new businesses and in turn leads to local business and employment growth.*

Affordable or subsidised workspace is a new concept that can support small start up businesses. We recommend that this concept is encouraged in the Study Area to support the growth of local businesses.

The initial years of any new business are testing and the reduction of costs through subsided rent or the provision of communal services can reduce business outlay and therefore risk. It in turn enhances the prospect of business success and their growth to employ a greater number of local residents and purchase local goods and services.

As a starting point for implementation, Council's Development Assessment Team could work with Council's Strategic Planning and Economic Development Team to establish a transparent Strategy for securing affordable workspace. The Strategy would be based on market research that clarifies the type of workspace required in Forster - Tuncurry by starter businesses, appropriate locations for this workspace within Forster - Tuncurry, business related facilities to be provided, a suitable period for incubation, a waiting list of businesses in addition to mechanisms to secure the space through Council planning and legal agreements. Methods to manage the space should also be investigated and established.

This step has already been initiated in relation to the proposed Civic Centre on Little Street, Forster. We understand that this prospective development could provide a mix of commercial incubator space, owned and managed by the Council. This space could include work areas, internet and IT hubs as well as shared meeting rooms, receptionists and staff amenities.

The proposed Pipers Creek Site and Tuncurry CBD are also recommended as suitable locations for subsidised commercial floorspace. Affordable commercial units could be provided above ground floor retail or commercial units. The units could be owned by private developers / landowners and leased to starter businesses for an agreed period of time (i.e. 5-10 years) at a reduced market rate in exchange for reduced Council rates or bonus development floorspace. This exchange could be secured via a S94 planning agreement, a voluntary planning agreement or another legally binding agreement.

This mechanism would result in negligible capital outlay for Council however there would be a cost incurred through Council Officer time if the space were to be managed by Council's Property Department and a register of suitable start up businesses maintained by Council's Economic Development Officer.

This mechanism could be promoted through the Mid North Coast as a clear advantage and enticement for business. It could also be prioritised for younger residents seeking to build on an innovative new idea that they may have for a service or business.

12.8 Mechanism 8: Business Precinct Plans

The Mechanism: *support the long term economic sustainability of Forster - Tuncurry's Villages.*

Intended Outcome: *a range of healthy and sustainable retail, commercial and service centres that meet the needs of local residents, employees and visitors to Forster - Tuncurry.*

One of the clear competitive advantages of private shopping centres is their ability to co-ordinate their tenants and shared domain. These centres can coordinate operating hours, parking offers, physical improvements and marketing. Each tenant is also required to provide an annual levy to contribute to the latter two factors creating a sizeable budget that can have a significant effect on attracting additional customers over other retail centres. We have found that Stockland Centre secures a proportion of its tenant rent to promote the centre to potential visitors. The management and promotional models of such malls operate in a similar manner to body corporates for residential unit buildings.

In order to combat the co-ordination advantage private shopping centres have over retail strips, a number of initiatives have been implemented in business precincts with similar characteristics and issues to Wharf Street, Forster and Manning Street, Tuncurry around Australia and internationally. The names of these initiatives vary dependent on the country they originate from and include: Town Centre Management (UK), Main Street Programme (Canada) and Business Improvement Districts (US). In NSW Business Improvement Districts or BID is the term advocated.

Despite the variations in the names for the Centre Management Models given above, each approach has some very similar principles. These principles include the creation of a committee or board comprising key interested parties that uses funding generated by local businesses through a special levy to guide a Local Business Coordinator to organise and implement priorities for change. What does vary however is the remit of the model and the coordinator i.e. does the model and the coordinator's role extends to include promotions, advertising, cleaning etc. Wharf Street, Forster presently has an active group of businesses that could support the implementation of this mechanism. We also understand that this body has been working with the Council and Department of State and Regional Development to secure funding to promote the centre as part of its "Shop Local Campaign".

Despite this however not all businesses form part of the Chamber of Commerce. Furthermore, despite the key role that landowners / landlords have in determining rents and retail mix, all too frequently in relation to Precinct management and promotion they are silent. The Council has the ability to directly influence the public realm however they do not have the ability to influence tenancy mix or leases/ rents. Accordingly there is no one organisation that can affect all of the interests that influence the success of the Precinct and can singularly implement a successful and balanced program for its economic growth.

The need for a coordinated approach between all stakeholders was identified by the research findings of a study undertaken by the Urban Land Institute (ULI) with respect to revitalising neighbourhood centres. The study found that *"long-term success will only come when public / private partnerships are created that marry the public planning, coordination, infrastructure and public financing tools with the private sectors entrepreneurial savvy, development expertise, retailing know-how and private capital."* [28]

Consequently a coordinated and agreed approach will be fundamental to the sustainable economic success of Forster - Tuncurry centres. The ULI study also identified the need for someone to be the proponent of the cause. The need for this persons (or teams of persons) was identified owing to the prospective length of the project and the need to continue to prioritise it over other competing community needs.

It is therefore recommended that as first step to implementing this Mechanism, Council appoints a Local Business Coordinator for Forster-Tuncurry' Centres (with priority given to the Manning Street, Tuncurry and Wharf Street, Forster Centres). The Local Business Coordinator would have the responsibility of coordinating the preparation and implementation of the Business Precinct Improvement Plans for the centres. The merits of this approach are many, including the fact that the Local Business Coordinator can be entirely focused on Forster - Tuncurry's centres and implementing strategies. The disadvantages are clearly cost related.

To overcome the cost hurdle, a number of Councils have sought permission from the State Government for a special rate levy. Other Councils have raised money through grants or other funding sources and sought match funding from centre based businesses and landowners for an agreed period of time. Both options may meet initial resistance, however to make effective use of funding and to appease the sceptics, we recommend that certain mechanisms and strategies are prioritised. For example, strategies that show quick results and secure economic benefits should be prioritised in order to highlight the success of the plans and to maintain commitment to the funding of the Local Coordinator.

[28] Ten Principles for Rebuilding Neighbourhood Retail – Urban Land Institute

Some of the key components of a Business Precinct Plan for Forster and Tuncurry centres include:

- strategies to address car parking, road access, pedestrian footpath widths and the quality of roads;
- strategies to address the quality of the streetscape including landscaping and street furniture;
- mechanisms to raise capital to support the physical centre improvements;
- strategies to enhance the quality of the private domain (i.e. shopfronts and the upper floors of buildings) and Council support through the development assessment process;
- targeted tenancy campaigns that actively seek businesses that meet the centre's niche or market;
- a series of events that attract visitors and shoppers to the centres throughout the year;
- a vision for the centre or market niche that differentiates it from its rival;
- a marketing and advertising campaign that promotes the centre to a wider catchment of shoppers and visitors and brings old shoppers back; and
- a Local Business Coordinator who can act as a single point of communication between all stakeholders (i.e. Council, Businesses, Landlords, Department of State and Regional Development) as well as action and monitor the implementation of these strategies.

The key requirement for the Local Business Coordinator position will be their dedication to the cause and 'staying power' to ensure that strategies and visions are not only planned and initiated but realised, modified and improved upon. The Local Business Coordinator will also play a key role in realising strategies for sustainable economic growth in the Precinct (as discussed earlier in this Strategy). Particular responsibilities or priorities for the Local Business Coordinator will be to:

- work with the local community and business groups to agree a long term vision for the centres;
- pull together a core group of stakeholders to form a public/ private partnership entity;
- prepare in consultation with stakeholders a 5 year Business Precinct Improvement Plan with key actions to phase over the life of the plan to achieve real change;
- the coordination of events in Forster - Tuncurry;
- a point of communication for stakeholders and the Council;
- communicate the vision and strategies agreed for the Villages and build on their success to elicit more support from local interests and the Council;
- meet with representatives of Stocklands and Woolworths to agree visions and marketing programs that complement rather than compete with each other and investigate the possibility of joint marketing;
- identify funding sources and opportunities to secure contributions from local businesses and landlords or the Council to achieve strategies; and

- promote membership of the public/ private entity for tenants and landlords.

As a first step to implementing this mechanism, it is recommended that Council commissions a suitably qualified and experienced consultant to write a Business Precinct plan. As indicated in this report, an existing centre that would benefit from this exercise is Manning Street, Tuncurry. Subject to funding, as an initial step, we also recommend the appointment of a Local Business Coordinator to oversee the preparation and consultation of the Plan.

The Business Precinct Plan should clearly outline strategies for economic growth and funding. The plan would be informed by extensive consultation with the local business community and other relevant stakeholders (i.e. State Government Organisations). It would in turn establish a series of steps to facilitate the implementation of the strategies identified, who would lead on key strategies and how to fund them.

12.9 Mechanism 9: Fiscal Incentives

The Mechanism: *to provide fiscal incentives to attract businesses to Forster - Tuncurry or the expansion of existing businesses.*

Intended Outcome: *a package of reasons (including fiscal) that attract desirable businesses to Forster - Tuncurry.*

A number of mechanisms and recommendations made by this report identify the need to proactively and positively encourage businesses to relocate to, or expand within Forster - Tuncurry. Our research and experience with a range of economic and employment studies have highlighted the potential for the following options:

- government subsidies for environmentally sustainable buildings and industries. These subsidies or building / business grants could be coordinated through a program with the Department of State and Regional Development and other state government agencies;
- a similar subsidy or grant system could be applied for start up business meeting selected criteria;
- reduced Council rates for a set period of time for start up businesses; desirable businesses or businesses looking to contribute to training and apprentice programs for local residents;
- the provision of bonus floorspace and building heights by Council in return for developer contributions to affordable workspace or other forms of desirable employment generating space;
- business relocation incentive packages for targeted industries and large employment companies;
- initiatives such as reductions in payroll tax. This initiative is presently being applied in the Macarthur Region through a reduced rate (i.e. reduced to 5.5%);
- special depreciation benefits for target industries relocating to Forster - Tuncurry; and
- match funding for labour re-skilling for industries (i.e. manufacturing) facing change.

It is important to recognise that one, or some, of the fiscal incentives discussed above should not be seen as a means of attracting business by themselves. Rather they work in cooperation with a range of factors including a transparent and efficient local development assessment process, available suitable land or buildings, existing industry clusters and a quality living and working environment.

12.10 Mechanism 10: A Supportive Development Process

The Mechanism: *to enhance the perception of, and certainty in the local development assessment process to encourage business confidence and reduce relocation and expansion risks / delays.*

Intended Outcome: *enhanced joint working with businesses and greater attraction to doing business with Great Lakes Council / investing in Forster - Tuncurry.*

Council and more specifically the Council Planning Department, is often the first point of contact for businesses considering the option of relocating to an LGA or locality. Where the local development process is perceived as too complicated, uncertain or risky it can result in a business choosing not to relocate to the area. The importance of a transparent, clear and efficient development process to attracting businesses and employment can not therefore be underestimated.

The preparation of a comprehensive Local Environmental Plans (LEP) in accordance with the Standard LEP Template will go someway to creating a consistent planning platform for development in Great Lakes and the Mid North Coast. This will go some way to simplifying the planning system for businesses. A number of additional strategies have been identified however to support the formation of a consistent and efficient development process in Forster – Tuncurry and to allow for investment certainty. These mechanisms have been outlined below.

The recognition of employment generation and economic investment as a key priority for Forster - Tuncurry when assessing development applications. It is therefore recommended that Council Officers and Members agree that the economic merits of a proposal should be balanced fairly with other planning considerations such as a development applications environmental and / or social impact.

It is also recommended that development applications of economic merit, over an agreed scale or capital value threshold, should be prioritised for assessment by a dedicated team allowing for a thorough yet rapid assessment.

To support the development assessment process Council should encourage pre-development application discussions with businesses. The discussions should be held with the same member(s) of the dedicated team of planners who will be assessing any proposal upon submission. Other council divisions / officers (i.e. traffic and transport, building and economic development) should be included in pre-application discussions to provide a balanced and up front response to any proposal and matters that need to be addressed.

The preparation of a guidance note for development applications that generate economic investment and employment over the agreed threshold is another method to support the implementation of this mechanism. For the guidance note to be effective, it should be cooperatively created across the Council's departments. The guidance note should provide consistent advice to prospective developers as to the level and type of information required for development assessment and details about the development process. The purpose of the guidance note is to provide clarity and certainty in the development process to facilitate speed and reliability.

The investigation of possible Simplified Planning Zones or the extension of exempt and complying development controls is another option for Council to be seen to be actively supporting businesses in the development process. These measures could be established for suitable / potential employment precincts with minimal environmental constraints. Within these zones the level of compliance to matters such as car parking, building heights and design may be relaxed to allow for a fast track development assessment and greater development certainty.

What will be of importance however to implementing this concept is the suitability of the site and its potential for impact to surrounding sensitive uses (such as residential or community uses). Accordingly sites such as Council's Waste Management Centre or the Sweet Pea Road Industrial Zone may be appropriate sites for initial investigations concerning possible Simplified Planning Zones subject to environmental assessment.

12.11 Mechanism 11: Make Forster - Tuncurry 'Urban Chic'

The Mechanism: *to enhance the cultural and recreational appeal of Forster - Tuncurry to a range of age groups.*

Intended Outcome: *a greater number of tourists with a broader range of activities as well as reinvigorated interest in living and working in the area by a range of age groups.*

The economic success of a subregion, region or global city is not a direct response to the number of commercial buildings it may have or the scale of its industrial sites, but rather the creation of diverse and attractive environments where skilled people want to work, live, interact and learn alongside business opportunities. These environments are fostered through layers of creativity, culture, history and good design.

Accordingly as Forster - Tuncurry grows and seeks to attract business investment, the parallel development of the Study Area's lifestyle and cultural attributes will become increasingly important to success. In turn the growth of the culture and recreation industry will generate employment and economic growth in its own right.

Stakeholder consultation has highlighted that the range of social and cultural activities for visitors, young or old residents are restricted. This has resulted in the strong lure (of younger residents in particular) to larger centres and cities. Culture and commercial facilities are also becoming increasingly important for the tourist as we now expect our cafe lattes and panni's to be served in chic cafes by the beach, and the opportunity to go on wine tours or adventure tours on our family holidays.

The eleventh mechanism to attract business investment therefore focuses on methods to create a diverse and exciting cultural environment. The implementation of this mechanism has commenced with the concept of the Civic Centre and the potential arts and culture hub within the Wharf Street, Forster Centre. This development will create a focal point for recreational and cultural activities in an attractive setting supported by a mix of cafes and restaurants. The realisation of this development, and its benefits to the entire Study Area, should be actively supported by Council.

Additional methods to achieve this vision and implement this mechanism are outlined below:

- the creation of active and thriving centres with ground floor uses that encourage interaction and street level activity and desirable environments such as cafes, wine bars, markets and street fairs. The preparation of Business Precinct Plans and Development Control Plans are a good starting point to achieving this;

- the promotion of Wharf Street, Forster as the main outdoor dining location for the study area with high quality restaurants and cafes as well as the boutique and unique shopping destination for local produce and the arts. This option can form part of the Marketing and Promotional Strategy for the Study Area discussed under Mechanism 3;

- the creation of cultural incubators and clusters in Manning Street, Tuncurry and Wharf Street, Forster (such as the proposed Civic Centre) to support the strength of these centres and their community focus by the provision of a unique use that attracts visitors from across the Forster – Tuncurry area and Great Lakes LGA. Cultural incubators nurture the growth and development of locally based artists and groups. Through this support for the arts can thrive and grow to attract like minded people, activities and facilities. For these reasons the use of part of the proposed Civic Centre in Wharf Street, Forster as an art gallery is supported;

- the creation of an iconic gateway or entrance to Forster - Tuncurry. In keeping with the sustainability theme, the turn off from the Pacific Highway to Forster - Tuncurry could be signalled by more than a street sign but by a large wind turbine. We also recommend the preservation of the buffer of natural / rural lands at the entrance points to Forster - Tuncurry. The areas of open land could visually mark the rural foundation of Forster - Tuncurry and welcome visitors to an oasis of sustainable living. The option could be implemented by Council through the safeguarding of land through the planning process;

- the promotion of balanced local communities by attracting 'younger residents' back to Forster - Tuncurry or reducing / addressing the reasons why they choose to leave. These reasons may be addressed through the provision of greater work opportunities, work opportunities in more knowledge based industries, greater post school educational opportunities and prospects for 'start up' business support;

- promotion of Forster - Tuncurry's natural features including National Parks and Marine Parks and associated activities such as walking and diving. The promotion of popular recreational pursuits such as fishing or surfing can enhance the cultural value of Forster - Tuncurry and its attractiveness to prospective residents and their businesses. This option can be implemented in conjunction with Mechanism 3: Broaden the Tourist Industry as well as Mechanism 11: Tell the World!; and

- the promotion of a range of annual events in Forster - Tuncurry such as local produce and organic food markets, trade fairs for sustainable goods, clean energy production conventions, local government conventions or sustainability conferences and music festivals in coastal setting to attract the attention of young and old residents as well as professionals and knowledge workers to excite interest in the local economy.

As a first step to implementing Mechanism 11, it is recommended that Council prepares a Culture and Tourism Strategy for the Forster - Tuncurry Study Area. The Culture and Tourism Strategy could incorporate the options listed above as well as ideas from a wide range of residents, businesses and organisations in Forster – Tuncurry. The penultimate aim of the Strategy will be to promote Forster - Tuncurry's attractiveness as a place to visit and in turn live and work.

12.12 Mechanism 12: Tell the World!

The Strategy: *prepare and implement a tailored marketing and advertising campaign for Forster - Tuncurry*.

The Outcome: *greater awareness across NSW of the benefits of not only holidaying in Forster - Tuncurry but also living, working and operating a successful business.*

As a final, yet critical mechanism to the success of this Implementation Strategy, we recommend the promotion and marketing of Forster – Tuncurry to the world! This mechanism has been intentionally listed last as it is recognised that some good news stories should be created first (through the implementation of the earlier mechanisms) before Forster - Tuncurry advertises its success and change.

Whilst many respondents during stakeholder consultation highlighted the need for a tourism marketing campaign, we believe that a broader range of businesses within Forster - Tuncurry could benefit from a comprehensive campaign to tell the world (or at least NSW primarily) what great things are happening in the locality.

The campaign could have a number of components including:

1. **A Fresh Tourist Campaign** that highlights the benefits of weekends to or annual family holidays in Forster - Tuncurry not only during the summer months but during the autumn and spring. For example couples could be attracted to the oyster and champagne tasting; the health conscious could be attracted to the organic food and yoga retreats; the cosmopolitan tourist could be attracted to the quality restaurants, local crafts and boutiques in Wharf Street, Forster and families could be attracted to learn more about environmental sustainability first hand;
2. **A Business and Tenants Campaign** – this campaign targets desirable businesses to relocate to Forster - Tuncurry. In keeping with the recommended point of difference, the Council could target sustainable businesses (i.e. businesses that are related to the development of sustainable technologies, industry research or practice environmentally sustainable business operations) through advertisements in trade

magazines, a presence at sustainable business seminars and trade fairs or simply cold calling these businesses to raise awareness of the benefits of doing business in Forster - Tuncurry; and

3. **A Promotions Campaign** – This campaign would seek to raise the profile of Forster - Tuncurry and all the exciting things that are occurring in the area. It would be tailored to the locality and highlight its unique features and attributes to prospective residents and workers. The events and attractions could range from the adventure races to street fairs, farmers markets, new sustainable developments, education opportunities and eco living options.

In Hill PDAs experience, the success of these campaigns will depend on a consistent theme or branding such as 'sustainability'. Of importance will be the expertise of the organisation chosen to lead on the "look and feel" of the campaign to ensure that it reaches the right market and is the most cost effective way of achieving results.

As a first step however methods to fund the campaigns will need to be explored. Funding assistance could be sought from State Government organisations such as the Department of State and Regional Development or a business levy for a three year period.

12.13 Mechanism 13: Review and Update

The Strategy: Monitor and *review the strategies and outcomes of the Employment Lands Implementation Strategy and amend where appropriate.*

The Outcome: *An effective and up to date Implementation Strategy that anticipates and plans for desirable change rather than reacting to it.*

As a final mechanism, we recommend the monitoring and periodic review of the Implementation Strategy by Council. This mechanism will be beneficial for a number of reasons as it will:

- assist in keeping stakeholders focused on the key priorities to cooperatively work towards;
- monitor the outcomes to ensure the mechanisms meet their objectives or identify where they should be refined to achieve them;
- ensure that the strategies are still relevant for Forster - Tuncurry;
- ensure that the mechanisms continue to be appropriate in light of changes in the economy or shifts in how we do business, holiday or shop; and
- identify new mechanisms to be included and / or old mechanisms to be enhanced or taken out of the Strategy as they are no longer required.

We recommend ongoing monitoring and review of the plan by Council's Economic Development and Strategic Planning Team (in conjunction with Councillors) every 5 years as a minimum. Any review should also aim to update the strategy with appropriate Census Data, planning policies / objectives, social and economic trends to maintain the Strategy's relevance and effectiveness.

13. MEETING FORECAST DEMAND

The following section identifies in greater detail how demand for the additional employment related floorspace highlighted in Section 11 can be accommodated in Forster - Tuncurry's centres and employment lands. This section identifies the type of development to be prioritised in each centre / employment precinct in accordance with business and community needs as well as planning mechanisms to protect and enhance the value of the environment.

13.1 Recommendations – Existing Retail & Commercial Centres

Manning Street, Tuncurry

The existing Centre located along Manning Street, Tuncurry (predominantly between Lake Street to the north and Catherine Street to the South) is one of the key centres in the Study Area. It is the first centre visitor's encounter on approach from the Pacific Highway (from the north) and therefore plays a gateway role for the Study Area. The centre provides a range of commercial and retail services to local residents with a greater focus on the needs of local residents than the tourist trade. Notwithstanding this point, tourist trade still forms an important component of business for the centre.

As discussed in Section 11, by 2031 there will be demand for an additional 22,500sqm of retail floorspace and 19,500sqm of commercial floorspace in the Study Area. In order to support the economic performance of Tuncurry and its ability to meet the needs of local residents, we believe that the Manning Street, Tuncurry centre should be the main focus for employment growth. This recommendation is supported by a number of factors including:

- the majority of new residential dwellings (and therefore growth in retail demand) in the Study Area will occur on the North Tuncurry Crown Land site which is in close proximity to the Manning Street, Tuncurry centre;
- the Urban Density and Design Review 2008 identified the prospect of increasing FSR's in the centre from 0.45:1 as appropriate;
- the centre is located in close proximity to the TAFE. The importance of the TAFE and its educational opportunities will need to continue to grow as well as its relationship with employment generating uses in the Study Area;
- the centre's location at the gateway to the peninsula reducing the need to travel across Wallis Lake Bridge. This has two benefits, firstly it decreases traffic congestion and secondly, owing to its location, in retail location terms it has the ability to capture more trade than a destination at the end of a peninsula; and
- the centre's existing need for economic support highlighted by the growing number of shopfront vacancies.

We envisage a vision for Manning Street, Tuncurry as the commercial focus of not only Forster - Tuncurry but the wider Great Lakes LGA. We believe (for the reasons discussed below) the existing Village Centre has the potential, and should be encouraged to grow to a *'compact and attractive'*[29] Town Centre in the Forster – Tuncurry Centre Hierarchy over the study period.

The centre has the lifestyle attributes that many local businesses identified in the business survey as a merit of operating in the Study Area. This level of lifestyle appeal could be enhanced through greater links with the harbour visually and by physically extending leisure and recreational uses from Manning Street to the harbour in the vicinity of the Fish Co-Op. This provides excellent lunch time eating options for centre based employees and supports the findings of the Urban Density and Design Review 2008 (UDDR 2008) to encourage a positive relationship between the Manning Street, Tuncurry Centre and the fishing industry.

We believe the centre should have a diverse retail and commercial focus providing opportunities for professional businesses, services, IT, tourist and government agencies to operate. It also has the ability to enhance its tertiary education focus with a better relationship with the TAFE.

The commercial focus of the Manning Street, Tuncurry Centre should be supported by its growth as a retail centre providing a range of grocery goods and services required by not only local residents but also a component for tourists. Of particular importance to the strength of the centre will be its ability to attract a second anchor store (such as a major supermarket tenant or discount department store) to the centre or the extension of the existing anchor tenant.

The retail analysis undertaken by this report has shown that there will be sufficient demand across the Study Area for additional supermarket floorspace after 2016. Prior to 2016 however there will be sufficient demand for a discount department store that could also act as a retail anchor.

Difficulties associated with attracting larger retail formats (discount department stores and main line supermarkets) however relate to the small scale of existing lots in the centre and the level of land ownership fragmentation. By way of example the existing Bi Lo site is approximately 0.5ha in area. A full line supermarket would need a 0.8 to 1ha site to provide at grade car parking, loading and unloading space.

The draft Manning Street Land Use and Zoning Study 2006 concluded that *"due to fragmentation, building and land constraints it is unlikely that Manning Street will be able to cater for the majority of retail / commercial needs for the medium term future population."*

There are a number of planning mechanisms that may be applied to address this issue. One option is the rezoning of additional land surrounding the centre. In theory this is an attractive option as it may create additional land for a new anchor store, furthermore this option accords with the policy direction recently established by the DoP's draft Centres Policy 2009. In practice however, the rezoning of additional land is only of benefit if there is a large site in single ownership adjacent to the centre, or capable of amalgamation into single ownership.

[29] Urban Density and Design Review 2008

This option is also only beneficial if land surrounding the centre has a land value that would facilitate the viable development of a supermarket. Given the significant heights permitted within the centre and surrounding the centre, this option may not however be workable as the development of tall residential buildings is likely to be the 'highest and best use' of the land for economic reasons.

Without designating the centre for commercial uses only (i.e. the B3 Commercial Core Zone), it is not possible to eliminate the land value uplift created as a result of higher density residential being permitted in the centre. Hill PDA's experience in other LGAs (such as Woollahra, Warringah and Lane Cove) has however identified an alternative option.

The alternative option relates to the existing Council owned lots designated as 5(a) Special Uses at the junction of Kent Street and Peel Streets, to the rear of shop front retail premises located on the western side of Manning Street. Our desk top analysis indicates that the scale of this site (together with the site to the immediate north) could facilitate a full line supermarket and the necessary car parking.

To encourage the development of this site as a supermarket with car parking (and potentially some commercial and residential uses on upper floors) we recommend that Council investigates the prospect of a joint venture agreement or long term lease (say 60 years) with a private developer. In this way a large centre based site can be made available for redevelopment to provide a supermarket or alternative anchor store.

In order to establish the parameters of what would be viable for development on the site, as a first step we recommend that Council engages experienced consultants to review land values and the feasibility of various mixed use development options on the Council owned site.

The expansion of the existing Manning Street, Tuncurry Centre in the short to medium term has also been considered as part of any planned development of the Point Road Peninsula. In accordance with DCP 51 Forster / Tuncurry Town Centres 2008, the area may be principally residential, however it may also include special purpose activity.

Special purpose activities could provide exciting opportunities for Tuncurry, maximising the value of the peninsula as a community and visitor destination. However, caution is raised in respect to ensuring any future plans for the Point Road Peninsula reinforces the role of the defined Manning Street, Tuncurry Centre as opposed to expanding and therefore diluting its retail provision over a greater linear expanse. Any prospective non residential uses on the site should be special in purpose and any potential impact to the Manning Street, Tuncurry Centre carefully minimised.

The UDDR 2008 also highlighted the low availability of good quality office space in the Study Area. As discussed above, economic trends are such that there will be a growing need for office based activities that relate to personal services, research and innovation, business services and communications. We agree with the UDDR that the Manning Street, Tuncurry Centre should become the main focal point for commercial offices in the Study Area.

We support the commercial vision for Manning Street, Tuncurry Centre for a number of reasons. Firstly its location lends itself well to serve the Study Area as well as surrounding centres such as Taree. Secondly development in this location is not likely to exacerbate traffic and reliance on the Wallis Lake Bridge. Lastly the centre has capacity for higher density development and in many cases redevelopment.

The UDDR 2008 estimated an existing FSR for the centre of 0.45:1. Using the same site area for the centre of 60,000sqm, but applying our floorspace survey figure, we believe the average density is lower at 0.3:1. In any case the UDDR 2008 found that an overall increase in FSR could facilitate an additional 7.3ha of area in the centre to provide 73,000sqm GFA. Accordingly the centre has great potential for intensification and could facilitate renewed retail provision at the ground floor with good quality office space above. The key matter will be getting the economics right and attracting desirable businesses.

Manning Street, Tuncurry could also have the advantage of providing a range of office types. We recommend a planning benefit through a bonus FSR is provided within the centre for pure employment generating (i.e. retail and commercial) development. It is anticipated that this bonus could facilitate opportunities for higher grade (and potentially subsidised) workspace to be developed.

Not all landowners will take the option of redevelopment however. Accordingly the existing lower quality and smaller (yet more affordable) office space will remain available for more price sensitive businesses or small starter businesses.

The success of Manning Street, Tuncurry will be dependent on prioritising its role as the commercial focus for the Study Area and enhancing its function as a centre. To achieve this we recommend three key approaches being:

1. the designation of a B2 Local Centre Zone for land fronting Manning Street currently designated as 3(a) Business from Catherine Street to Lake Street including Council land at the junction of Kent and Peel Streets;

2. the designation of the B4 Mixed Use Zone for land surrounding land zoned B2 Local Centre in accordance with the spatial recommendations of the UDDR and including existing retail sites in Beach Street; and

3. the preparation of a Business Precinct Plan for the centre and the establishment of a main street committee in accordance with the recommendations of the UDDR.

In agreement with the draft GLELS 2006 and the UDDR, we believe a central component of the Manning Street, Tuncurry Centre should be promoted as the commercial focus. We therefore recommend that as a minimum both ground and first floors of buildings fronting Manning Street within the B2 Local Centre Zone should be retail and / or commercial office in use. In consultation with Council we agree that this provision may be achieved through a clause in any future LEP that secures as a minimum an FSR of 1:1 for retail and commercial in the B2 local centre zone.

A bonus FSR should also be applied for developments that seek to provide an entirely commercial office development with ground floor retail being the only exception.

A minimum provision of retail and / or commercial floorspace within the B2 Local Centre Zone for Manning Street, Tuncurry will have the benefit of reinforcing its character and role as the main commercial centre for the Study Area. Retail and commercial uses will provide active street front uses and a range of opportunities for small to medium size businesses and personal services well suited to operating within centre locations.

Careful design and building layouts will need to be considered in order to protect the function and operation of the centre's employment generating uses from more sensitive uses including shop top residential. Disturbances from businesses as a result of servicing, deliveries, cooking smells and late night opening hours can create conflict in mixed use centres. Any potential restrictions to the operation of existing or future businesses in centres as a result of residential units should be carefully considered and factored into any development proposal.

Surrounding the proposed B2 Local Centre Zone we support the UDDR's recommendation for the B4 Mixed Use Zone. The B4 Mixed Use zone includes a range of uses appropriate for centres including retail and commercial as well as residential dwellings above ground floor. The application of this zone would be beneficial for the Manning Street, Tuncurry Centre as:

a. it would provide greater activation in the centre throughout the day and evening to the benefit of the centre's character and businesses;

b. It would allow for active street fronts (retail or commercial uses) within the centre whilst facilitating efficient use of land on upper floors; and

c. It would provide a physical buffer or transition zone between the commercial centre and surrounding residential uses.

The preparation of a Business Precinct Plan for the operation of the centre will also be of key importance. A plan of this nature will integrate the needs of retailers and commercial operators to create a business plan for the centre. This business plan will coordinate owners, tenants, relevant government agencies and the Council to ensure the centre is functioning well in physical layout terms, but also from a business point of view. Business Precinct Plans tend to include marketing and promotion plans for centres, target tenancy plans and management plans to ensure stakeholder coordination.

As a final point, it is of great importance to note that the commercial success of the Manning Street, Tuncurry Centre will be dependent on Council endorsing its position as the primary commercial centre for the Study Area. This position will be vulnerable to competition from town-edge or out of town developments that offer similar land uses on cheaper sites and larger sites (i.e. business parks and shopping malls).

In agreement with the UDDR, these uses *"can remove the market demand required to underpin the centre."* We therefore recommend that Council seeks an Economic Impact Assessment (EIA) to be undertaken for any development application that proposes a major commercial component that would not be located within the

Manning Street, Tuncurry Centre. The EIA should test the economic effect of the proposed development to Centre.

Wharf Street, Forster

The Wharf Street, Forster Centre is focused around Wharf Street, Wallis Street and Little Street to the South of Head Street. As discussed in Section 8.2 of this report the centre plays an important role in the provision of retail and services for not only local residents but visitors / tourists to the Study Area. The centre's physical location and retail offer is geared towards the visitor market with 29% of shop front establishments categorised as catered food and 18% as apparel.

The centre faces challenges however in relation to the proximity of surrounding centres and the scale of their retail offer. This is the more reason why Wharf Street, Forster should not seek to compete with, but rather complement the larger centres.

Our vision for the Wharf Street, Forster Centre supports the vision identified by the draft GLELS 2006 as a waterfront and leisure centre with a strong tourist focus. This role should be enhanced through the ongoing physical improvement of the centre so that it better embraces Head Street, the gateway to Forster on approach across Wallis Lake Bridge and provides a greater range of dining and leisure options along the lake and harbour.

The centre should provide attractive dining and leisure options for not only tourists but also residents looking to have their coffee in the morning, Saturday brunch with friends or celebratory dinner in the evening. These activities are increasingly sought as our tastes become more refined and communities seek a quality of lifestyle in all stages of life. The centre could also specialise in smaller boutique stores that provide local art or organic produce thus creating a point of difference to other centres.

The ability for the centre to cater to a broader range of patrons, both residents and tourists will be important in the quieter tourist seasons. The spread of the tourist season over longer periods will also support the centres economic viability. Mechanisms to address these matters, and those outlined above, should be endorsed and implemented through a tailored Business Precinct Plan for Wharf Street, Forster.

Another mechanism to support the economic viability of the centre is the development of the Civic Precinct in Little Street. The development has the potential to create a focal point for the centre and support the success of existing uses through spin off trade. To achieve these benefits it will be important to ensure that the Civic Precinct plays a role and provides services that are compatible with the existing centres. This may be achieved through the provision of complementary uses such as community events, local art fairs and subsidised commercial workspace for local starter businesses.

We recommend that the Village be zoned B2 Local Centre to reflect its role in the hierarchy and to encourage a broad range of uses that can ensure street level activity throughout the day and evening. To support this objective (and consistent with the UDDR) we recommend the use of the B4 Mixed Use Zone surrounding the B2 Local

Centre. Appropriate locations and development controls (i.e. FSR and height) for the B4 Mixed Use Zone should be assessed subject to further design and environmental analysis.

Breese Parade Centre

The draft GLELS 2006 recommended the expansion of retail and bulky goods services in this centre over a five year period from the date of the study. Since that time, the Stockland Shopping Centre has extended to include an 8,000sqm Bunnings Warehouse, an ALDI supermarket (1,400sqm), Target Country (1,500sqm), Kmart (5,800sqm) and over 45 specialty stores. The Stockland Shopping Centre alone now provides over 34,000sqm of retail space.

Accordingly the Breese Parade Centre provides a strong mix of retail and civic town centre services as well as bulky goods premises and urban support uses. The latter falls mainly within the Forster Industrial Area discussed in greater detail below. The industrial area provides an important nexus with the centre creating a truly diverse service environment.

Our retail analysis shows that there is little demand for any substantial additional retail space in the Study Area in the short term. By 2016, it is anticipated however that sufficient demand will be generated for an additional 3,000sqm discount department store. Whilst ideally this store would be located within Tuncurry, the Breese Parade Centre is also a suitable location given its role as a Town Centre in the retail hierarchy and the existing cluster of stores and parking.

Our vision for the Breese Parade Centre is for it to remain as the main civic and retail centre of Forster - Tuncurry. This vision stems from the centre's established infrastructure and uses. To accommodate additional retail and other complementary uses in the medium to long term, some additional land may be however required. Land known as Pipers Creek has potential for development in association with the Breese Parade Centre. Its relationship with the centre is discussed further below.

We recommend that the Breese Parade Centre is zoned B3 Commercial Core in order to protect the non residential, employment generating potential of the centre. This zone will also help to ensure that higher value uses such as residential do not outprice existing or prospective employment generating uses.

Forster Keys & Fairways

Both of these Small Villages provide a range of convenient retail options that meet the day to day needs of residents. Their role should be supported and enhanced. To achieve this, over the study period we have identified some opportunities to increase the scale of offer commensurate with population growth. It is important to note however, that their scale should not be increased to the point that their place in the centre hierarchy would alter.

We recommend the small villages are zoned B1 Neighbourhood Centre.

Lake Street, Forster

Lake Street is currently occupied by two premises, a fruit shop and a lawn mower retail shop. At an Ordinary Meeting on 12 December 2006 Council resolved to make amendments to the 'Housing Strategy for Forster-Tuncurry' 2006. This included:

"Investigation into the establishment of a commercial / retail zone for the establishment of a neighbourhood shopping centre on the corner of Lake and Hadley Streets."

These premises are currently zoned 2(a) Low Density Residential and are not formally identified as a commercial / retail. These premises, however, provide a selection of convenient retail options that meet the day to day needs of residents. Their role should be supported and enhanced.

It is recommended that the existing retail premises be zoned B1 Neighbourhood Centre and the area be categorised as a neighbourhood centre in the proposed future Centre Hierarchy. It is important to note however, that the scale of the Lake Street, Forster Centre should not be increased so that its place within the Centre Hierarchy would alter.

Proposed South Forster Neighbourhood Centre

The South Forster Structure Plan 2006 proposes a neighbourhood centre in one of two potential locations in South Forster. The development of a new centre has been proposed, subject to the rezoning and development of the surrounding area. It is recognised by the South Forster Structure Plan 2006 that the new centre should be subservient to the Breese Parade Town Centre and should provide a local retail convenience for the surrounding community.

Should a new centre be created within South Forster, the centre should be of a scale that serves the day to day needs of the residential population and not unbalance the proposed future Centre Hierarchy shown below. Furthermore, any new retail development within the South Forster area should be subject to a full retail demand and supply assessment and the assessment of impact to existing centres. This should enable the provision of a convenience centre, in the interests of environmental sustainability and access that would not adversely impact the surrounding centres such as the Forster Keys Small Village.

Breckenridge Channel

Waterfront related businesses fronting Breckenridge Channel, to the west of Little Street do not form part of this Strategy's brief as they are not located within employment lands. Notwithstanding this matter, they are employment generating uses and we therefore recommend that this feature is recognised in any future zone for the site.

In light of Breckenridge Channel's environmental sensitivities and further to discussions with Council, we recommend the use of the W1 Natural Waterways Zone. The Zone seeks to protect environmentally and scenically sensitive waterways whilst allowing for sustainable fishing industries and recreational fishing.

In order to recognise the recreational and tourist value of the existing uses located over the waterways, we recommend an additional objective is added to the proposed W1 Natural Waterways Zone that allows uses:

"To provide for sustainable recreation, boating and tourist related facilities."

Furthermore we recommend that additional employment generating uses that may be permitted with consent within the zone include: aquaculture; boat repair facilities; boat sheds, charter and tourism boating activity; environmental facilities; moorings; marinas; port facilities; recreational facilities (outdoors).

13.2 Recommendations – Existing Industrial Land

Tuncurry Industrial Area

Tuncurry Industrial Area is an established precinct that provides land to a range of businesses. The precinct has the benefit of being located at the beginning of the Forster - Tuncurry peninsula with access to the Pacific Highway that does not require vehicles to pass through the Study Area's main centres or residential areas.

The majority of sites within the precinct are occupied by businesses that range from urban support services (auto repairs and parts) to storage, trade related services (moulding, bricks, kitchens, joinery) and a Council depot. A large component of the precinct (zoned industrial) is however still undeveloped and vacant. This land is in private ownership. Our discussions with the land owner have indicated a preference for developing the site and that businesses have indicated demand for the industrial land. The availability of this land to prospective industrial businesses will be of great importance to meeting the forecast increase in demand for industrial land over the study period.

The Precinct also plays an important role in supporting local utility providers such as Mid Coast Water. This operator has a sizeable site adjacent to the Tuncurry Industrial Area currently zoned 5(a) Special Uses. Whilst the Mid Coast Water Site does not appear to be heavily utilised, our discussions with the operator have indicated that the site does not have scope for greater intensification as buffers are required from surrounding uses and retention ponds are being maintained in case of future use.

The industrial area is presently zoned 4(a) General Industrial. As a key industrial precinct all land within the zone should be protected as industrial lands. We recommend that the area is designated IN2 Light Industrial in accordance with the Standard LEP Template. The IN2 Zone allows for a range of light industrial uses whilst minimising any potential disturbances to existing or prospective surrounding urban development. Bulky goods retail should not be included as an additional permitted use within the zone, as retailing is contrary to the objectives of the zone and would erode the industrial character of the area. This is particularly important in light of the limited availability of industrial sites within the zone that are subdivided and available for development at present.

Our vision for the precinct is a thriving mix of local support services, local industrial and manufacturing businesses. This precinct also has greater potential to work in conjunction with the Manning Street, Tuncurry Centre and provide a range of employment sites for 'sustainable' businesses attracted to Forster - Tuncurry. Businesses focused on the issue of environmental sustainability may require industrial or manufacturing space that would not be suited to centre locations. Accordingly dependent on demand for, and the success of Forster - Tuncurry's marketing and target tenancy campaigns, it may be appropriate to create a cluster of light industrial sheds in the Tuncurry Industrial Area.

These 'sheds' could be attractive work destinations with a component of commercial space to meet the needs of the associated innovative industries. These sheds would differ from many existing industrial units as they would provide high quality, contemporary working spaces that would contribute to a more even mix of commercial to industrial floorspace (i.e. 60 / 40 industrial / commercial). Any location for the units within an industrial area would need to ensure compatibility with surrounding industrial uses.

We also recommend that the development of sites surrounding the industrial area have careful regard to issues of amenity. This will be particularly relevant for residential or other sensitive uses that may be adversely affected by smell, noise or traffic disturbances as a result of business operations. As Tuncurry grows as an urban centre, it is likely that sensitive uses such as residential will further encroach on the site.

It will therefore be important for any future development to ensure that it does not adversely affect the operation of industrial businesses. To ensure that this does not occur, Council should aim to minimise (and where possible avoid) additional residential development / increased density of residential development directly surrounding industrial zones.

Council should also ensure that future development applications are accompanied by Statements of Environmental Effect that assess the relationship of the proposed development to the industrial area through design, building orientation, materials (sound proof windows) and physical buffers. Council will need to be confident that this assessment is thorough and should highlight to any applicant the importance of realistically protecting the important function of the industrial area for Forster - Tuncurry.

Forster Industrial Area

Forster Industrial Area plays an important role in the Study Area as it is an established zone that provides scope for a range of light industrial uses. These uses include automotive repairs as well as household trade related uses that evidently play an important role in supporting residential development in Forster - Tuncurry and the wider LGA. The Forster Industrial Area also has the benefit of being very accessible for local residents, trade persons and businesses seeking a range of goods given its location next to the main retail and civic centre for the locality.

The Forster Industrial Area plays an important urban support role for the Forster - Tuncurry Study Area and should be protected. It is an established industrial area that is performing well, with very few vacancies indicating business preference for this location.

The precinct is currently zoned 4(a) General Industrial. In accordance with the Standard LEP Template, we recommend the area is zoned IN2 Light Industrial. This zone permits a range of light industrial and warehouse uses. The zone aims to encourage employment opportunities and to support the viability of centres. It also aims to enable other land uses to meet the day to day needs of workers. These objectives are considered important given the physical proximity of the industrial area to the retail and civic components of the Breese Parade Centre.

Some of the challenges or threats to the industrial areas ongoing use however relate to the encroachment of bulky goods retail and the area's relationship with surrounding residential. We believe that the area should be clearly earmarked as a light industrial zone that does not permit bulky goods retailing. The existing fringe of bulky goods retail located along Breese Parade, east of the Stocklands Shopping Complex and south of the existing easement, should however be zoned B5 Business Development with 'Bulky Goods premises' added as an additional permitted use with consent to the B5 zone.

This zoning distinction would ensure that a precedent is not established within the industrial zone for bulky goods that could increase land prices and reduce the availability of land for light industrial uses. We also recommend that the industrial area is designated with a lower FSR to ensure that land values are not enhanced outpricing the potential for new industries or the expansion of existing industries.

We do not recommend the precinct is zoned IN1 General Industrial (in accordance with the Standard LEP) for two reasons. Primarily the precinct is located within close proximity to more sensitive uses such as residential. The general industrial zone could encourage heavier uses that would disrupt the amenity of these uses. Secondly the general industrial zone has a greater emphasis on freight transport facilities. The Forster Industrial area is not located on a main highway or transport corridor and the growth of large vehicle traffic is considered inappropriate in a constrained area that is already experiencing traffic congestion.

Finally, in order to ensure there is minimal conflict between the industrial precinct and surrounding residential uses, we recommend a buffer of less sensitive uses (retail, office, vegetation or parks) is retained or encouraged around the periphery of the industrial precinct. As a minimum, sensitive uses should not be permitted to encroach upon the existing industrial area by developing in closer proximity or at significantly greater densities.

Sweet Pea Road Industrial Area

From an industrial perspective, the existing Sweet Pea Road Industrial Zone has the benefit of being physically removed and buffered from the more concentrated urban areas of Forster - Tuncurry. This separation reduces the potential for conflict between industrial and more sensitive uses such as residential. Notwithstanding this separation, the industrial area still provides an option for businesses to be based locally and for Forster residents to live in close proximity to their place of work in accordance with sound sustainability principles.

Challenges for the existing industrial zone relate to access and the need for industry related vehicles to pass through Forster and South Forster and in turn over the Wallis Lake Bridge. This can create greater strain on the existing road network with particular regard to the bridge in peak seasons. An alternative access / egress point is the southern exit / approach along The Lakes Way to the Study Area. This option is not likely to be desirable however for larger vehicles owing to the width of the carriageway and the length of travel time before reaching the Pacific Highway.

Additional important considerations are the access constraints of the existing industrial zone from Sweet Pea Road, as well as the environmental sensitivity of land surrounding the zone. In light of these factors and the forecast future demand for industrial land within Forster -Tuncurry (discussed in the preceding section) we support the recommendations of the South Forster Structure Plan 2006.

More specifically we support the recommendations of the South Forster Structure Plan and Council's resolution to prepare an LEP that facilitates a land swap of the existing area zoned industrial, with the quarry site that is located alongside Sweet Pea Road (refer to discussion in Section 8.5). This would facilitate better access for future occupiers and reduce the potential impact of redeveloping the existing vacant land that is zoned industrial that may have some ecological value. The land swap would also create a physical barrier between future industrial uses and potential residential development to the north east of the site.

Based on estimates calculated from the figure shown in the South Forster Structure Plan, this land swap could result in an industrial zone in the order of 31.7ha. This would represent a considerable increase in industrial land (compared to the existing 7.3ha parcel of industrial area located off Sweet Pea Road) and a more accessible site.

In light of the access and environmental considerations, we also recommend the precinct is prioritised for use by local businesses with low traffic generation potential. These businesses would ideally be in support of Forster - Tuncurry's sustainability industry and could create a cluster of manufacturing industries within the precinct that do not conflict with other uses. This would reduce the need for vehicle movement in and out of the area and may promote a greater awareness or sensitivity to the quality of the surrounding environment.

We recommend that the site is designated IN2 Light Industrial in accordance with the standard LEP to facilitate these uses and to provide a range of industrial sites for businesses to choose from. We do not recommend the IN1 General Industrial designation owing to the access considerations and the unsuitability of the precinct to support industries heavily reliant on transporting large goods frequently across the wider region. Furthermore it is understood that as a result of the proposed land swap there is the potential for the development of residential in close proximity. The use of the General Industrial Zone could hinder this prospect.

Subject to detailed environmental assessment, the proposed land swap and / or development of the existing zoned industrial land should be undertaken in the medium to long term (say from 2016) when sufficient demand is forecast to be generated by industrial businesses.

Tuncurry and Forster Working Waterfronts

The waterfront lands located in Tuncurry and Forster that are currently designated as 3(d) — Special Business Waterfront play an important role in both the generation of employment in the Study Area as well as the areas identity. In order to recognise and protect these businesses we recommend that the IN4 Working Waterfront is directly applied to the existing sites designated within the 3(d) — Special Business Waterfront Zone.

In order to support the viability of these uses and the role they play in other local industries (such as Tourism) we recommend that an additional objective is added to the IN4 Working Waterfront Zone that allows uses within the zone:

"To provide a diverse range of uses which are complementary and ancillary to existing industrial uses to ensure their ongoing viability".

In support of this objective additional uses that may be permitted with consent could include: Aquaculture; Boat sheds; Charter and tourism boating facilities; Take-away food and drink premises; Marina; Port facilities; Recreation area; Recreation facility (outdoor); Research station; Restaurant; Signage; Water recreation structures.

By expanding the uses within the zone that may be permitted with consent, the economic viability of the main oyster farming business may be supported by ancillary uses such as take-away foods. It will be important to ensure however that any use that is not industrial in nature or employment generating, should be ancillary to the main use and no greater than 20 - 30% of internal floor area. Furthermore any ancillary uses should not adversely affect the function of the oyster farms in any way.

13.3 Recommendations – Potential Future Employment Lands

As part of the Strategy, three additional sites have been identified as having the potential to partially support the provision of retail, commercial and industrial floorspace required in Forster - Tuncurry over the study period. The following section discusses the merits (or otherwise) of utilising these sites as well as prospective development issues including:

- potential impacts to infrastructure;
- potential impacts to current retail, commercial and industrial uses;
- the site's amenity and accessibility to future growth areas;
- the site's availability in terms of ownership, costs, constraints and zoning issues; and
- any significant site constraints (e.g. flooding) to be addressed before development can proceed.

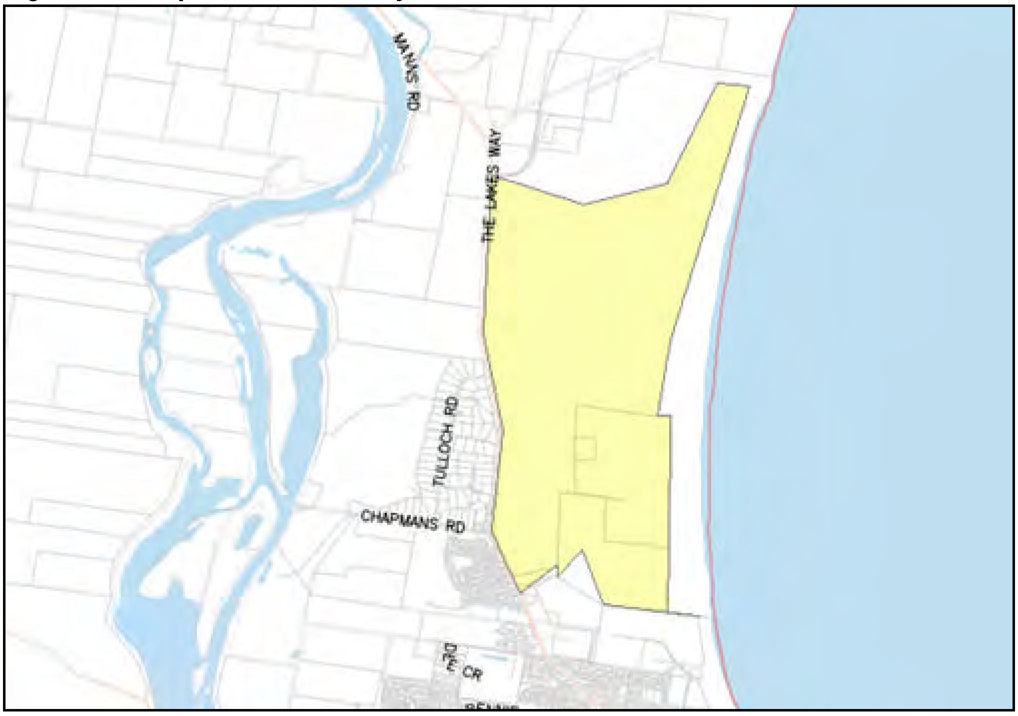
NORTH TUNCURRY CROWN LAND

Location

The North Tuncurry Crown Land site is located approximately 3km by road north of the Wallis Lake Bridge. The majority of the 400ha site is undeveloped and vacant with the exception of the existing golf course. The site is served by a minor road which connects to Tuncurry Road to the west and with The Lakes Way.

The site is bound by sand dunes and the ocean to the east, Tuncurry Landfill and Darawank Nature Reserve to the north, The Lakes Way to the west and Tuncurry urban area, including the Great Lakes Joint Education Campus, to the south.

Figure 23 - Map of North Tuncurry Crown Land Site



Source: Red Square

Planning Controls

Under the current Manning Local Environmental Plan No.1 the land zoning is noted as a "Deferred matter".

Comments

The North Tuncurry Crown Land Site has been identified as a potential site for urban development. The site is currently designated as Crown Land. Landcom have undertaken initial investigations to determine the key issues and constraints to be addressed should the site be developed in the future.

As an initial stage, the Department of Lands have published public notices identifying their intention to revoke the reservation of the land and to lease the Crown Land in accordance with Section 34A of the Crown Lands Act. In coordination, Landcom are presently publicly notifying the intention and calling for any claims for Native Title. Subject to the outcomes of this stage, Landcom anticipates that greater resources will be directed to site analysis by mid 2009. These resources will include environmental, infrastructure and market assessments and in turn site master planning.

The analysis undertaken by the draft GLELS 2006 identified the sites potential for 300ha of residential uses, 7ha of retail land, a business park and aged care facilities. Given the preliminary stage of site investigations, this descriptive break down of uses by area is considered premature.

<u>Opportunities</u>

The site has many attractive development qualities including its comprehensive scale, single ownership, the quality of its environment and its comparatively close proximity to the Pacific Highway. It has good accessibility via road to existing retail centres in Tuncurry as well as educational institutions (TAFE and secondary school).

In keeping with the theme of sustainability and the recommendations of this report, the North Tuncurry Crown Land site has the potential to distinguish itself from other residential developments in the region. The North Tuncurry Crown Land development could embrace the theme of sustainability creating a lifestyle opportunity for prospective residents that help them feel good about not only how they live but also in how it supports the environment. This theme could be translated through building design, eco landscapes, commercial businesses and employment opportunities.

In the interests of sustainability, the development could provide a range of living and working options. This may range from residents with home offices, to designated commercial units or potentially light industrial units if well buffered from the residential uses. It is anticipated that any commercial or business component on the site would be minor and play a subservient role to the Manning Street, Tuncurry Centre (the main commercial centre for Forster - Tuncurry) and Tuncurry Industrial Area.

In order to ensure a high quality development that attracts a desirable market, we also anticipate that any employment units will be high quality with excellent telecommunications fit out to meet the home working or telecommuting needs of future occupants. This live and work scenario will help to support the potential ‘sustainable theme’ for the development and the lifestyle attraction for occupants looking to escape the daily commute.

A component of retail will also be required on the site to serve the needs of future residents and employees. Any future centre should be modest in scale and seek to provide daily ‘top up’ items or convenience goods. Any future retail should be in the order of 4,000sqm in floorspace and should aim to be designated as a Small Village. Notwithstanding the guide, the scale and character of any centre on the site will need to be assessed in greater detail during the Master Planning process.

Issues and Challenges

Our discussions with Landcom, the Department of Lands, Council and other stakeholders have identified a number of potential challenges or constraints in relation to the sites prospective development. These include:

- Environmental - flooding, coastal erosion, rising sea level, climate change and bushfire;
- Aboriginal and/ or European heritage;
- Ecological – potential rare or endangered species;
- Legal – potential claims for Native Title;
- Social – the provision of sufficient infrastructure to sustainably meet community needs; and
- Economic – a soft economy and housing market in addition to the potential impact of additional retail on the site to existing centres.

As part of the master planning process the issues outlined above will need to be addressed in detail. An Environmental Impact Assessment will also need to be prepared to accompany any application for development. The EIA will need to explain to the acceptance of the Local Planning Authority and community, that due consideration has been given to each of the above issues prior to conditional consent being granted for development on the site.

Infrastructure

The site is currently vacant with little physical infrastructure with respect to utilities or services. Planning for these features will need to be coordinated at the master plan stage. It will also be necessary to ensure sufficient upgrades are secured, or contributions made to improving existing infrastructure that will be used by future occupants of the site.

For example, The Lakes Way is likely to require improvements to cater to increased traffic including pedestrian crossings, traffic signals, road widening and resurfacing. Enhanced public transport options, new cycle lanes, community facilities and retail services will also be required to meet any additional pressures created from population growth.

TUNCURRY WASTE MANAGEMENT CENTRE

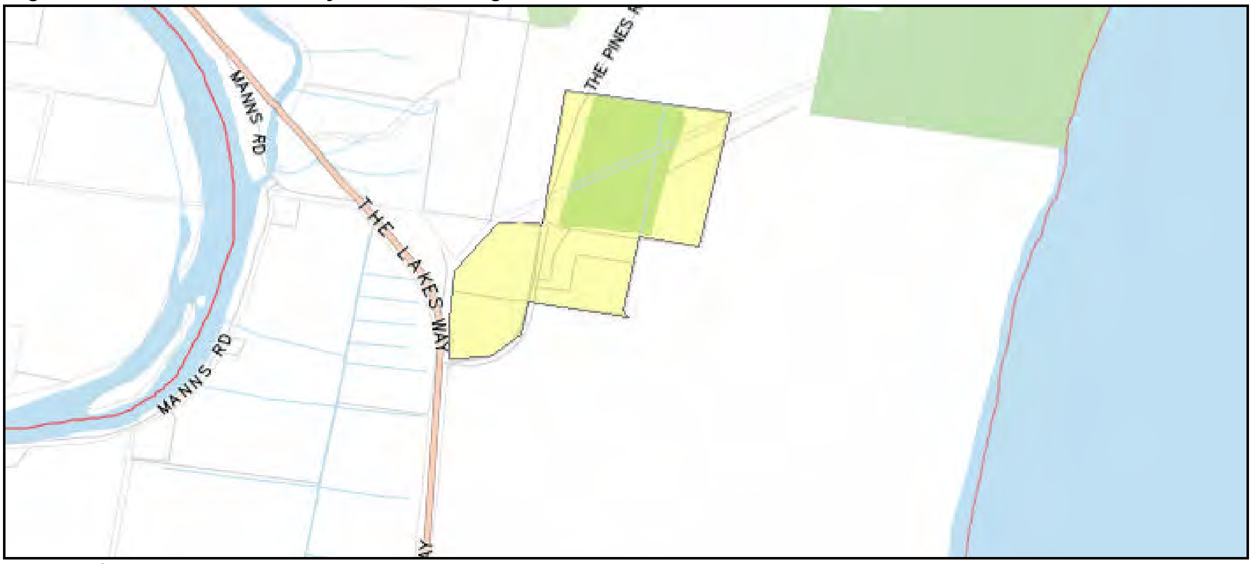
Location

The site known as the 'North Tuncurry Council Management Centre' is located approximately 6.5km by road north of the Wallis Lake Bridge. The majority of the site is currently used by the Waste Management Centre for landfill, the Material Recovery Facility as well as the Tip Shop and Education Room. Surrounding this site are a number of vegetated lots that have not been developed. Together with the Tuncurry Waste Management Centre, these lots have been identified as having future potential for employment provision.

The main road which serves the precinct is Tuncurry Tip Road which connects to The Lakes Way to the west. The precinct is bordered by vegetated land to the north and east, The Lakes Way and Manns Road to the west and vacant (yet vegetated) Crown Land to the south.

Council has acquired adjoining land to the east of the 'tip shop' area for the purposes of a long term small vehicle waste transfer station, once the landfill has closed.

Figure 24 - Plan of Tuncurry Waste Management Centre and Potential Industrial Lands



Source: Red Square

Planning Controls

Under the Manning Local Environmental Plan No.1 the land is zoned as 1(a) Non Urban and 1(b) Non Urban.

Opportunities

The precinct is owned by Council and the Department of Lands. This ownership, along with the low intensity of existing use and separation of the site from residential creates a site that has opportunities for a broad range of employment generating opportunities. The precinct also has the benefit of being located at the entrance to Forster - Tuncurry thus having comparatively good access to the Pacific Highway and Greater Taree.

The draft GLELS 2006 identified the potential of this site for general industrial uses estimating a potential site area of 50ha. We estimate an area of this scale could generate in the order of 200,000sqm of industrial floorspace. Taking a conservative approach, and factoring in environmental considerations (such as ecology and existing landfill) the extent of land (forming part of, and neighbouring the existing Council Waste Management Site) suitable for development is likely to be less. Subject to further detailed assessment, the two lots on the north side of Tuncurry Tip Road (after the junction with The Lakes Way) could be identified as appropriate for industrial development. The two lots have a combined area of 11ha and could provide 44,000sqm of floorspace at an FSR of 0.4:1.

The precinct has the potential to provide additional scope for industrial businesses looking to locate in Forster - Tuncurry that can not find suitable land within the Tuncurry Industrial Area. This 'flow over' or alternative employment land is an important mechanism to ensuring sufficient oversupply of industrial land reducing prospect for prohibitive land prices. We therefore recommend that the site is zoned IN2 Light Industrial in the medium to long term (i.e. 2016 - 2031).

The site should not facilitate commercial floorspace unless it is ancillary (i.e. less than 10%) and critical to the effective operation of the industrial business. All stand alone commercial floorspace should be prioritised for the Manning Street, Tuncurry Centre. In order to protect and enhance the employment generating potential of the site, we do not recommend that residential is permitted as part of the sites development, but rather an appropriate buffer is provided between the site and any surrounding residential uses.

The precinct's gateway location has some benefits but also challenges. At the gateway this precinct can create a landmark entry for Forster - Tuncurry. Consequently any potential future use will need to ensure that it creates or maintains a positive and visually attractive entrance. Some opportunities include sustainable industries such as a wind farm.

The release of land within this site for employment generating uses should be phased commensurate with demand.

Issues and Challenges

Detailed environmental analysis is required to better assess the extent of site constraints. At this stage we highlight some potential challenges and issues may include:

- Environmental – bushfire, the potential effects of climate change;
- Aboriginal and / or European heritage;
- Ecological – potential rare or endangered species;
- Infrastructure – the cost of providing additional infrastructure (road access, water, sewerage and communications;
- Potential contamination from landfill and other former uses with respect to the sites used for these purposed; and
- The attraction of locating a business next to a Tuncurry Waste Management Centre and any associated smell or noise disturbance.

PIPERS CREEK

Location

The site known as 'Pipers Creek' is located approximately 4km south-east of the Wallis Lake Bridge. The total precinct (generally as described in the Forster Tuncurry Conservation and Development Strategy) has an estimated area of 17ha. The Lakes Way runs along the north-eastern boundary of the site and provides good vehicle access. The site is bound by Pipers Creek to the west, residential developments to the east and south, and a mix of retail and commercial to the north, together with a caravan park.

The majority of the site is undeveloped however some retail and sales uses are located on or adjacent to the site including Barclay Marine, furniture retailers such as Brian's Rise and Shine Bedding Store, a car sales yard, a tavern and Island Palms Motor Inn.

For the purposes of this report we refer to the section of the site coloured yellow in the plan below. Whilst the shaded section does not refer to the full extent of the Pipers Creek Precinct land that could be developed (solid black line), it does refer to the portion that is located in close proximity to the existing employment uses in the area and has the potential to create a logical extension to the Breese Parade centre.

Figure 25 - Plan of Proposed Pipers Creek Site

Source: Red Square

Planning Controls

Under the current Great Lakes Local Environmental Plan 1996, the land is zoned primarily as 1(c) Future Urban Investigation Zone.

Opportunities

The site presents a number of opportunities in the medium term (i.e. from 2016) given its close proximity to the Breese Parade Centre. The site also has a high amenity value given its location along Pipers Creek and the associated views. From a development point of view it is an attractive site as it is predominantly in single private ownership and has good visual exposure to passing traffic and trade.

The draft GLELS 2006 identified potential uses for the site to include bulky goods, low intensity retail and aged care. Consultation with stakeholders has highlighted market demand for the site for large format retail stores (i.e. a supermarket or discount department store).

Our analysis supports the use of the site in the medium term (2016+) for employment generating uses. Appropriate employment uses for the site include ground floor retail with commercial offices on upper floors. Ground floor retail could include specialty stores, restaurants and cafes that provide amenities for employees and visitors to the centre whilst commercial uses on the upper floors could include professional offices (accountants, lawyers, architects) medical uses (a medical centre, dentist, naturopath, physiotherapist) and incubator units for local starter businesses that share facilities (such as a receptionist and meeting rooms) to minimise overheads.

In this way a high quality restaurant and entertainment environment could be created on the ground floor that opens onto Pipers Creek creating an attractive pedestrian and civic environment in keeping with the vision for the Breese Parade Town Centre. A nexus could also be formed between the prospective development of the site and the civic and office focus of the Council building, library and community facilities in the existing Breese Parade Centre.

The extension of the Breese Parade Centre to include the site could also facilitate additional bulky goods retailing or a discount department store. From a design perspective this may not be desirable however as there would be a missed opportunity to link the existing centre visually with the waterway and maximise the visual amenity of the site. Furthermore the provision of extensive car parking on the site could hinder the sites efficient use and potentially increase water quality impacts on Pipers Creek. Accordingly any proposed bulky goods retailing or discount department store should be carefully designed and orientated in order to enhance, rather than detract from, the visual appeal and pedestrian amenity of the centre.

Whilst residential uses are located in close proximity to the wider Pipers Creek Precinct, the inclusion of residential as part of this site's development is considered inappropriate for a number of reasons. Primarily a component of residential development would create a missed opportunity for the development of the site (as shown in yellow on the plan) as an extension to the centre and its commercial / civic focus. The site presents a unique opportunity to extend the centre with employment uses whilst the wider South Forster location provides a range of opportunities for additional housing. Secondly the introduction of sensitive uses on the site, such as residential could hinder the effective function of businesses including late trading hours or early morning deliveries.

In summary we recommend that the Pipers Creek Site is designated for employment generating uses that will support the effective function of the Breese Parade Centre. We understand that Council has recently rezoned a portion of the Pipers Creek Precinct fronting The Lakes Way (south of Barclay Marine) from 1c Future Urban Investigation to B6 Enterprise Corridor. Whilst we support the employment objectives of the B6 zone, we raise concern with the inclusion of residential. For the reasons discussed above, we believe the site (as shown in yellow on the plan) should not be developed with a mix of residential and employment uses.

To maximise the potential of this site (as shown in yellow on the plan), we strongly recommend collaborative site master planning between the Council, site owner (s) and the community for the <u>entire</u> Pipers Creek precinct . It is also important to highlight that prior to any rezoning of the Pipers Creek Site for urban development in the medium term (from 2016), more detailed investigations of site constraints will be required. These investigations should include, but not be limited to, traffic and parking studies, design and view studies, ecological assessments, social and economic impact assessments, water quality, flooding and bushfire assessments. In light of these potential requirements, a Local Environmental Study should be undertaken for the entire precinct.

Subject to the outcome of more detailed investigations, we believe there is potential for the use of the B5 Business Development Zone generally across that part of the site shaded in yellow on the plan above. To facilitate the potential for specialised retail referred to in the B5 zones objectives, we recommend the inclusion of 'Bulky Goods Premises' and restaurants as uses to be permitted with consent.

With regard to established bulky goods activity in the area to the north of the site, this area may be considered for B5 in the short term (2008-2016) with 'Bulky Goods' added as an additional permitted use with consent.

<u>Issues and Challenges</u>

After consultation with key stakeholders, Hill PDA understands that the site could have a number of environmental issues which will need to be addressed in full should development be considered. Some of the key constraints / challenges to development include:

- Environmental - flooding, drainage, the potential effects of climate change and bushfire;
- Aboriginal or European heritage;
- Water quality;
- Economic impact (including consideration of the Department of Planning's, D*raft Centres Policy* – Net Community benefit Test);
- Design and views ;
- Traffic generation and access;
- Ecological – potential rare or endangered species, riparian corridor/ vegetation.

13.4 Phasing of Industrial Land

Section 11 of the Strategy identified the growth in demand for industrial land over the study period. The following section reviews the implications of this demand and provides recommendations as to the appropriate phasing of releasing / expanding the existing and potential industrial precincts discussed above.

2008 – 2016 Short Term

In the short term, our analysis has estimated a growth in demand for between 1.3ha and 1.8ha of industrial land across the Study Area using development densities of 0.5:1 to 0.35:1 respectively. As the Study Area presently has 15ha of vacant and zoned industrial land in a number of separate ownerships, we suggest that there is sufficient land available to meed demand between 2006 and 2016.

2016 – 2031 Medium to Long Term

In the medium to long term, our analysis forecasts a growth in demand for an additional 2.3ha to 3.3ha of land applying the same range of development densities as above. This will result in a net growth in demand by 2031 (from 2006) of between 4ha and 5ha of land. Once again we suggest that this additional demand could be accommodated by the existing 15ha of vacant land.

It is important to highlight however that as 11ha of the 15ha of existing vacant land is in sole private ownership, the availability of land to meet forecast demand is at risk of realisation. This is less of an issue in the short term as the 1.3ha to 1.8ha of land could be accommodated by sites with a range of land owners across both Forster and Tuncurry Light Industrial Areas. Demand for 4 - 5ha of land however tips the balance of demand and is therefore dependant on the 11ha of land being available.

Accordingly we recommend that in the medium to long term, alternative industrial land options are zoned and made available for use. We recommend that from 2016 the proposed land swap within the Sweet Pea Road Industrial Precinct is undertaken to create accessible and desirable light industrial land for local businesses. In order to provide a surplus of land (and therefore a moderator of industrial land prices) we recommend in the longer term the release of land (say in the order of 5ha) within the Tuncurry Waste Management Centre Precinct.

The provision of land within the Sweet Pea Road and Tuncurry Waste Management Centre Precinct, are recommended as options that provide a mix of site opportunities and characteristics within both Forster and Tuncurry. Accordingly these precincts will be able to support employment generation at either end of the Study Area to the benefit of local business and minimising the need for industry related vehicles to travel through the Study Area's centres and residential areas.

13.5 Recommended Land Use Principles

A number of general principles are recommended for Forster - Tuncurry in order to support the development of its Centre Hierarchy and the provision of retail, commercial, community and urban support services that meet the needs of residents. These principles include:

- all retail development should be contained within existing centres or designated centres. The centres identified in the centre hierarchy of this report should be defined with boundaries that relate to current clusters including peripheral or "out-of-centre" areas;
- promote the consolidation of existing centres with the exception of a new small village centre on the North Tuncurry Crown Land site and a new small village centre in South Forster subject to development;
- make efficient use of land through the promotion of efficient building design, orientation and high yield employment uses (i.e. commercial);
- support the extension of supermarkets in centres such as Manning Street, Tuncurry to provide a range of convenient retail options and to support the viability of these centres against larger centres with stronger retail offer;
- support the provision of a range of small villages and neighbourhood centres in areas such as the North Tuncurry Crown Land site experiencing significant population growth in order to provide convenient and local shopping options that minimise the need to travel longer distances. This will also help to reduce the strain on road networks within the Study Area;
- protect the operation and function of businesses within centres and employment lands from sensitive uses such as residential through mechanisms such as physical buffers and zones such as the B3 Commercial Core;
- development applications for additional retail facilities, particularly proposals for new supermarkets or bulky goods premises should be submitted with appropriate environmental design and economic assessments for review by Council or independent experts;
- allow bulky goods retail only within designated areas such as the B5 Business Development Zone or adjacent to centres Manning Street, Tuncurry Village;
- facilitate Forster - Tuncurry's point of difference through the promotion of sustainable design and business function / operation;
- stand alone retail, including bulky goods and factory outlets that are removed from the established retail centres or clusters are to be restricted in their potential floor space expansion to protect the value of surrounding industrial uses;
- promote the active marketing of employment lands and Forster - Tuncurry's centres to attract businesses that will generate employment and support the local economy;

- all retail activities, including factory outlets and bulky goods leave, be recognised as mainstream retail and encouraged to be located in established or emerging centres; and
- all industrial zones prohibit retailing with the exception of fast foods or cafes, and minor retailing which is ancillary to the predominant industrial use.

13.6 Planning Recommendation - Future Hierarchy & Zones

Based on the retail modelling undertaken by Hill PDA, and the proposed visions and roles for each centre discussed above, a revised centre hierarchy has been developed. Hill PDA has also made recommendations as to appropriate planning zones for each centre and employment precinct.

The recommendations have been based on:

- the roles and visions identified for each centre in this report;
- a review of each centre's opportunities and constraints;
- the potential centre hierarchy; and
- the definitions and objectives provided by the Standard LEP Template.

The proposed revised hierarchy is shown in the table below.

Table 58 - Potential Future Centre and Employment Land Hierarchy

Hierarchy Category	Centre Name	Proposed Zones
Major Town Centre	Forster - Tuncurry	Various
Town Centre	Breese Parade	B3 Commercial Core, B5 Business Development
	Manning Street, Tuncurry	B2 Local Centre, B4 Mixed Use
Village Centre	Wharf Street, Forster	B2 Local Centre, B4 Mixed Use
Small Village Centre	Fairways	B1 Neighbourhood Centre
	Forster Keys	B1 Neighbourhood Centre
	South Forster (potential)*	B1 Neighbourhood Centre
	North Tuncurry Crown Land (potential)*	B1 Neighbourhood Centre
Neighbourhood Centres	Lake Street, Forster	B1 Neighbourhood Centre
Primary Industrial Areas	Forster Industrial Area	IN2 Light Industrial / B5 Business Development
	Tuncurry Industrial Area	IN2 Light Industrial
Secondary Industrial Area	Sweet Pea Road Industrial Area	IN2 Light Industrial
	Council Waste Management Site (potential)**	IN2 Light Industrial
Working Waterfront	Tuncurry (Selected Sites)	IN4 Working Waterfront
	Breckenridge Channel (Barclay Oyster Farm)	IN4 Working Waterfront
Medical Precinct	Forster Medical Precinct	In accordance with surrounding use

Source: Hill PDA

* Subject to development and retail impact assessment

** Subject to environmental assessment

13.7 Planning Recommendation – FSR & Heights

Floor Space Ratios (FSRs) are important considerations for the success and viability of Forster-Tuncurry's Centres and Employment Lands. The following section provides recommendations as to appropriate principles for FSRs and building heights that aim to facilitate appropriate development.

It is important to note however that where recommendations have been made, they have been based on our experience and economic rationale. As this Strategy has not had the benefit of detailed design or environmental analysis, any FSR and building height recommendations should be subject to a more detailed assessment of environmental, heritage and design matters. Furthermore we recommend that any FSR or height proposed by this report and / or Council is tested further in light of prevailing market conditions and development feasibility analysis to ensure that the recommended FSRs can indeed facilitate viable development.

With respect to FSRs we recommend a tailored approach is adopted to:

1. retain desirable employment sites and uses where appropriate; and
2. facilitate viable redevelopment where appropriate.

In general for centres and / or sites Council seeks to retain for local urban support services (i.e. small automotive repairs, panel beaters etc) or as industrial land an FSR of (or below) 1:1 should be retained or adopted.

For centres and / or sites Council seeks to retain, yet also enhance through redevelopment, such as Town Centres (i.e. Breese Parade) and Villages (i.e. Wharf Street, Forster) an FSR of 2:1 to 2.5:1 should be used dependant on land values and therefore the feasibility of development.

For sites Council seeks to be re-developed to higher order uses, an FSR of 3:1 should be permitted within the B3 Commercial Core or B2 Local Centre Zones. Within B4 Mixed Use Zones an FSR of 2:1 should be applied.

Sites that Council earmarks for re-development, or seeks to attract significant development to, as opposed to alternative locations in the LGA, an FSR of 3.5:1 may be applied (i.e. within the B2 Local Centre of Manning Street, Tuncurry). An FSR of 3.5:1 could also be granted as a bonus for pure commercial developments to help facilitate this type of development as an attractive and viable option.

The general principles discussed above have been summarised below.

Table 59 - Summary of Recommended FSR Principles

FSR Recommendations	Recommended FSR
Sites to be retained for local services	1:1
Sites to be retained for Light Industry	1:1
Sites to be developed within Small Villages and Neighbourhood Villages	1:1
Sites to be developed within Town Centres and Villages	2:1 – 3:1
Sites to be developed in Business Development Zones	2:1 - 2.5:1
Sites within B2 Local Centre Zone to be developed for commercial with a bonus FSR	3.5:1

Source: Hill PDA

There is one difference between our recommendations for FSR and those recommended by DCP 51 Forster / Tuncurry Town Centres 2008. The difference relates to the potential for a bonus FSR of 3.5:1 within the B2 Local Centre Zone in Tuncurry. As discussed in the Strategy, a bonus is recommended to act as a development incentive for commercial development in desirable locations (such as Manning Street, Tuncurry).

Applying the approach discussed above, the following FSR recommendations are made for each centre and employment land in the Forster-Tuncurry Study Area. We have also provided recommendations for maximum building heights in accordance with the findings of the UDDR 2008. Please note that the following recommendations may need to be altered for individual sites or parts of centres owing to design, environmental or other specific considerations.

Table 60 - Potential Floor Space Ratios and Building Heights for Centres and Employment Lands

Centre Name	Existing Zones (LEP 1996)	Proposed Zones	Proposed FSR	Proposed Max Height
Forster - Tuncurry	Various	Various	Various	Various
Breese Parade	3(a) General Business 5(a) Special Uses	B3 Commercial Core	3:1	20 - 30m
	4(a) General Industrial 1(c) Future Urban Investigation	B5 Business Development	2.5:1	20m
Manning Street, Tuncurry	3(a) General Business 5(a) Special Uses	B2 Local Centre	2.5:1	20 - 30m
	3(a) General Business 5(a) Special Uses	B2 Local Centre Commercial Bonus	3.5:1	30m
	2(b) Medium Density Residential	B4 Mixed Use	2:1	12m – 17m
Wharf Street, Forster	3(a) General Business	B2 Local Centre	2:1 – 3:1	13m – 33m
Fairways	3(a) General Business	B1 Neighbourhood Centre	1:1	8.5m
Forster Keys	3(a) General Business	B1 Neighbourhood Centre	1:1	8.5m
South Forster (potential)*	1(c) Future Urban Investigation	B1 Neighbourhood Centre	1:1	8.5m
North Tuncurry Crown Land (potential)*	A Deferred Matter under Manning LEP No.1	B1 Neighbourhood Centre	1:1	8.5m
Lake Street, Forster	2(a) Low Density Residential	B1 Neighbourhood Centre	1:1	8.5m
Forster Industrial Area	4(a) General Industrial Zone	IN2 Light Industrial	1:1	10m
	4(a) General Industrial Zone	B5 Business Development	2.5:1	20m
Tuncurry Industrial Area	4(a) General Industrial Zone	IN2 Light Industrial	1:1	10m
Sweet Pea Road	1(c) Future Urban Investigation	IN2 Light Industrial	1:1	10m

Council Waste Management Site	Manning LEP No.1: 1(a) and 1(b) Non Urban	IN2 Light Industrial	1:1	10m
Tuncurry Working Waterfront*	3(d) Special Business Waterfront	IN4 Working Waterfront	1:1	8.5m
Forster Working Waterfront	3(d) Special Business Waterfront	IN4 Working Waterfront	1:1	8.5m
Forster Medical Precinct	2(b) Medium Density Residential & 6(a) Open Space and Recreation with proposed rezoning to 5(a) Special Uses	In accordance with surrounding use	1:1	8.5m

Source: Hill PDA
* Selected Sites

13.8 Planning Recommendation – Bulky Goods Premises

Forster - Tuncurry presently provides 18,100sqm of bulky goods floorspace within 19 premises. By 2031 we forecast demand for an additional 7,500sqm of floorspace. Whilst this demand does not have to be met entirely within the Forster – Tuncurry Study Area, bulky goods premises are good employment generators and the additional demand could contribute 185 jobs to the Study Area. Retail jobs are particularly attractive as they generally seek to employ local residents, provide flexible or part time employment options and do not rely on a high skill base.

The provision of this floorspace in Forster - Tuncurry would also act as a magnet for additional expenditure generated in areas outside of the existing Primary Trade Area and would minimise the need for future residents to travel to alternative centres for this range of goods. This is particularly pertinent in an area that will be experiencing significant dwelling growth and therefore demand for bulky goods such as household furniture, floor coverings, garden equipment and household electrical goods. In this way Forster - Tuncurry could play a greater regional role in respect to retail provision.

Notwithstanding the above, with bulky goods now making up more than 20% of all retail floor space in NSW it is essential to recognise its position in the retail hierarchy and its impact on traditional retail centres. It is recommended that all future planning of bulky goods outlets are considered as part of the established retail hierarchy and that any new location only be considered on the basis that it will support rather than detract from that hierarchy. Bulky goods retailing and factory-outlets should not be considered as an exception to traditional retailing requiring separate concessions or provisions, but rather be included as general retail, making an important and essential contribution to a vital and viable retail community. Furthermore Bulky Goods Premises should not challenge the employment generating potential of industrial precincts. For these reasons, bulky goods retail should not be permitted within the Tuncurry, Forster or Sweet Pea Road Industrial Precincts.

It will be important for future bulky goods premises to complement rather than detract from the functions and special qualities of Forster - Tuncurry's main centres. Therefore future bulky goods premises should be located close to centres where they can support rather than threaten them. The existing bulky goods precincts (such as in Breese Parade) should be ratified and zoned B5 Business Development to distinguish them from the existing surrounding industrial lands. This will in turn protect the industrial value of the precincts from the further encroachment of bulky goods premises.

Additional opportunities for the provision of 7,500sqm of Bulky Goods floorspace include the potential B5 Business Development Zone on the Pipers Creek Site within the Breese Parade Centre or within the Manning Street, Tuncurry Town Centre. The provision of the latter would be subject to site ownership constraints however in economic terms it would assist the viability of the centre through the creation of a retail anchor. Failing the realisation of the Manning Street Tuncurry option, the Pipers Creek Precinct is of sufficient scale to accommodate the entire 7,500sqm of bulky good floorspace, in addition to a mix of other employment generating uses.

13.9 Planning Recommendation - Floorspace Incentives

This report has discussed the need to encourage and prioritise a range of employment generating uses within Forster - Tuncurry. In many cases it is recognised that there are constraints in the free market to achieving this desirable development. One way of addressing this is through FSR bonuses.

The potential for this mechanism was highlighted in the draft GLELS 2006 and the UDDR 2008. In Hill PDA's experience with similar mechanisms in the Sydney GMA and UK, the use of this system would be applicable to Forster - Tuncurry. This is because of the comparatively high land value of the Study Area (exemplified by the number of taller residential buildings). In economic terms, additional FSR and a greater building height could significantly support the viability and therefore realisation of development.

It is recommended that this mechanism is explored for the Manning Street, Tuncurry Centre to attract an anchor tenant. Planning controls should specify that the policy only relates to designated areas or sites within the Town Centre and for sites over a given threshold (say 2,000sqm). This would encourage the amalgamation of sites and therefore create the opportunity for larger retail formats such as a supermarket or discount department store. The policy will also need to stipulate that the ground floor of the development should be a single plate retail space for a large tenant.

For components of the Centre outside of the B2 Local Centre Zone (within the B4 Mixed Use Zone) on the upper floors, residential units may be permitted to help offset the cost of development. This vertical building mix format has been applied in various high value locations in Sydney including Bondi and is proposed in Double Bay and Hunters Hill. It has the benefit of providing an active ground floor use and anchor tenant for the centre as well as a mix of uses that support the centre's vitality in the evenings.

Bonus FSR may also be applied to promote the provision of commercial floorspace in centres. A bonus may be given in return for the development of higher density commercial office space within the, the B2 Local Centre Zone or the provision of incubator commercial units above ground floor across the centre. The incubator units could be managed by the Council or another nominated party for an agreed period (i.e. 5 to 10 years) before being returned to the developer for an open market tenant. The Council could provide the incubator space at a sub market rent to attract and support new businesses, with a particular focus on businesses with young initiators and employees.

Should the Council be successful in securing this space for an agreed period, a unit within a centre could become a business focal point. This would offer services such as internet access, meeting rooms, catering and office equipment to fledgling businesses and home offices. This would further support activity and business growth within centres.

13.10 Planning Recommendation – Economic Impact Assessments

In order to protect the existing centre hierarchy and viability of Forster - Tuncurry's centres (particularly its village centres) all retail development proposals, of a significant scale should be submitted with by an Economic Impact Assessment (EIA).

Any EIA should include a sound assessment of demand for the particular type of retail proposed in light of existing supply. It should also review the potential impact of the proposed development to the role and function of centres not only within the Study Area, but the broader Great Lakes LGA and Greater Taree.

13.11 Planning Recommendation - Council Rate Incentives

The Urban Design and Density Review 2008 recommended that all new development should be encouraged to *"incorporate the principles of sustainability. Environmental, social and economic sustainability tests will be applied to all new projects".* This recommendation accords with the Council's wider vision for a sustainable community in the Great Lakes LGA.

To practically achieve this objective in future development, design and operational mechanisms need to be built in at the development design stage. Development in NSW is currently encouraged to comply with the BASIX standards for energy and water efficiency however there is far greater scope for achieving sustainable development.

Councils Planning Department is well placed to ensure that these factors are considered. In the interests of developer transparency and education however, it is recommended that Council's Planning Team, in cooperation with the Natural Systems and Estuaries Branch develop a policy or guidelines to outline desirable sustainable building mechanisms and materials.

The Council policy may include a range of sustainability levels – from water saving devices (toilets, taps and hoses); sustainable design (cross ventilation, ground source cooling) to sustainable infrastructure such as solar panels and wind turbines. Sustainable operations could also be included such as travel plans that encourage the use of sustainable travel methods, car pooling that reduces demand on private car use and material recycling policies.

Some of the mechanisms outlined above should be mandatory in all development to accord with best environmental practice such as dual flushing toilets and reduced water using shower heads. Other mechanisms can be incorporated through smart design (such as building orientation and cross ventilation) with minimal additional cost to the developer. These mechanisms can be suggested by Council planning officers at the pre-application stage whilst the building is in the design process.

Some mechanisms described above can however incur a greater development cost and it will be important to ensure that Council's persistence for these mechanisms does not hinder desirable development i.e. development that provides a community service and / or generates jobs.

For the mechanisms in Council's Sustainability Guidelines / DCP that incur a noticeable cost, but are considered of great environmental value, it is recommended that the developer is given an incentive to include them, rather than a penalty not to. One idea to achieve this is to match fund the costs through an exemption from Council rates for a period of say 3, 5 or 10 years dependent on the cost / value of sustainability criteria they are including. This would not incur an upfront cost for Council however it would ensure the ongoing sustainable use of these buildings. Should however the mechanisms not be realised in the final development or ceased, the exemption could be withdrawn by Council.

13.12 Environmental Sustainability & Climate Change

Climate change and environmentally sound development practice is increasingly becoming a legislative issue to be addressed by Local Councils and applicants for development. In fact recent court decisions within NSW and Victoria have highlighted that rising sea levels are a material consideration in the suitability or otherwise of a development. This is clearly a case for many coastal sites within Forster - Tuncurry and associated environmental considerations such as storm surge, coastal erosion / shoreline recession.

The need to thoroughly consider each and all of environmental considerations at the development assessment stage is critical. The onus should be placed on the applicant to ensure a reasonable assessment has been undertaken and presented to Council. Council will also need to ensure that the resources are in place to give due consideration to each issue.

In the interests of employment growth in the Study Area, it will be of great importance for Great Lakes Council to ensure that the matter of environmental sustainability and climate change does not become (or be perceived to be) a constraint to developers or businesses seeking to expand.

We recommend Council works closely with prospective developers, new and existing businesses to ensure that environmental matters do not hinder the realisation of desirable employment generating development. This joint working can be through pre-application meetings, environmental workshops and the sharing of available environmental information and experiences to support appropriate amendments or design considerations that will address common issues. Great Lakes Council should seek to strengthen Staff resources in their Natural Systems Team and ensure close working with the planning team to become a Council recognised for their ability to find clever solutions rather than barriers to development.

14. IMPLEMENTATION STRATEGY SUMMARY

The following section provides a summary of the visions, planning controls, mechanisms and phasings recommended in the preceding sections which together form the Forster - Tuncurry Implementation Strategy.

As a first step however a successful implementation strategy must have a clear vision and objectives for what would be a desirable outcome. Based on the analysis and discussion provided in this report the following principles are recommended as a basis for a vision for Forster - Tuncurry:

- a Major Town with a point of difference to other coastal towns – a point of difference that not only attracts business clusters but also retains a diverse workforce;
- a range of employment opportunities with greater consistency across the calendar year;
- a range of employment opportunities that appeal to the skills of a broad age group;
- businesses that make efficient use of land and have high employment yields;
- businesses with confidence to expand and that Council will work with where appropriate;
- a suitable range and quality of retail provision and urban support services that meets local demand and reduces the need to travel outside of the Study Area;
- a suitable range and quality of retail provision that meets the needs of visitors to the area;
- an economically and environmentally sustainable mix of uses that enhances, rather than detracts from, the physical attributes that attracted urban development to Forster - Tuncurry in the first place;
- a Major Town that strives for excellence in environmentally sustainable living and working; that excels in the land repair industry and attracts innovative research and development industries to cluster together and share ideas;
- a Major Town that provides tertiary education opportunities for school leavers; ongoing life training / education and knowledge sharing; and
- a Major Town that balances the interests of today's generation with those of future generations in a sustainable way.

Table 61 - Summary of Visions and Recommendations for Centres and Employment Lands

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM	VISION	STAGING
Forster – Tuncurry	Major Town	Various	Various	A major centre that meets a broad range of retail, business and community needs for the Forster – Tuncurry community and the wider Region.	Short Term
Breese Parade	Town Centre	B3 Commercial Core	3:1 Max H: 20m - 30m	A range of employment - generating opportunities, retail and civic services to meet the needs of local residents. A mix of employment generating uses that maximise the sites' merits with respect to water views and road access. Employment lands that support the role and function of the Breese Parade Town Centre.	Short Term
	Existing Bulky Goods in Breese Parade	B5 Business Development	2.5:1 Max H: 20m		Short Term
	Pipers Creek Site	TBD	TBD		Medium term
	Existing Bulky Goods on Pipers Creek Site	B5 Business Development			Short Term
Manning Street, Tuncurry	Town Centre	B2 Local Centre	2.5:1 with minimum 1:1 retail / commercial & bonus 3.5:1 for commercial only Max H: 20m - 30m	Centre grows from existing role as a Village Centre into a Town Centre for Tuncurry. The centre also becomes the main commercial centre for Forster - Tuncurry that provides an attractive working environment. A retail centre that meets the grocery service and wider retail needs of the Tuncurry community.	Short Term
		B4 Mixed Use	2:1 Max H: 12 - 17m		Short Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM	VISION	STAGING
Wharf Street, Forster	Village	B2 Local Centre B4 Mixed Use	2:1 – 3:1 Max H: 13m - 33m 2:1 – 3:1 Max H: 13m - 33m	An attractive centre with a range of boutique retailers, leisure and convenience services for local residents and visitors. A centre that capitalises on its waterfront location and associated uses.	Short Term
Fairways	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
Forster Keys	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
South Forster	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A new centre that meets the convenience needs of local residents minimising the need to travel by car.	Medium Term
North Tuncurry Crown Land	Small Village	B1 Neighbourhood Centre	1:1 Max H: 8.5m Subject to Master Plan	A new centre to meet the convenience needs of future residents of the North Tuncurry Crown Land site. The centre will be of a scale that ensures no conflict with the role of the Manning Street, Tuncurry Town Centre or its economic viability.	Medium Term
North Tuncurry Crown Land	TBD	TBD	TBD but Indicative 1:1 Max H: 8.5m	Additional employment generating uses to be determined subject to master plan and environmental assessment.	Medium Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM	VISION	STAGING
Lake Street, Forster	Neighbourhood	B1 Neighbourhood Centre	1:1 Max H: 8.5m	A compact centre that meets the convenience needs of local residents minimising the need to travel by car.	Short Term
Forster Industrial Area	Primary Industrial Lands, of Strategic Importance and Part of the Breese Parade Centre	IN2 Light Industrial	1:1 Max H: 10m	A mix of employment generating opportunities that support the function of the town centre and do not conflict with sensitive surrounding uses. A range of businesses and services that meet the needs of local residents, trades and businesses.	Short Term
Tuncurry Industrial Area	Primary Industrial Lands of Strategic Importance	IN2 Light Industrial	1:1 Max H: 10m	Primary industrial lands for Forster - Tuncurry. Industrial lands that provide a mix of site sizes that facilitate clusters of industry and good access to Greater Taree and the Pacific Highway.	Short Term
Sweet Pea Road	Secondary Industrial Lands of Local Importance	IN2 Light Industrial	TBD but indicative 1:1 Max H: 10m	Industrial lands that are buffered from surrounding residential uses and that provide local employment / business location options for light industries and manufacturers.	Medium Term
Tuncurry Working Waterfront	Primary Working Waterfront Lands	IN4 Working Waterfront	1:1 Max H: 8.5m	A mix of employment generating uses and facilities related to waterfront industrial and maritime activities that require direct access to the water. An employment generating zone that will not adversely affect the visual character of the foreshore and will support the viability and function of the	Short Term

PRECINCT / CENTRE	PROPOSED HEIRACHY	PROPOSED ZONING	PROPOSED FSR & MAXIMUM	VISION	STAGING
				Manning Street, Tuncurry Centre.	
Forster Working Waterfront	Primary Working Waterfront Lands	IN4 Working Waterfront	1:1 Max H: 8.5m	A mix of employment generating uses and facilities related to waterfront industrial and maritime activities that require direct access to the water. An employment generating zone that will not adversely affect the visual character of the foreshore and will support the viability and function of the Wharf Street, Forster Centre.	Short Term
Breckenridge Channel (excluding Oyster Farm)	Natural Waterways with recreational boating and tourism facilities	W1 Natural Waterways	0.5:1 Max H: 8.5m	A zone of significant natural value that facilitates recreational boating, tourist activity and outdoor recreational activities without adversely affecting the environmental quality of the waterways.	Short Tem
Medical Precinct	Specialised Centre	In accordance with surrounding uses	1:1 Max H: 8.5m	A specialised centre focused around the existing hospital that meets the health and community needs of the local population. A centre of excellence for sustainable ageing that does not conflict with surrounding uses.	Short Term
North Tuncurry Waste Management Centre	TBD	IN2 Light Industrial	TBD but Indicative 1:1 Max H: 8.5m	To be determined subject to master plan and environmental assessment.	Long Term

Source: Hill PDA

TBD: To be determined subject to master plan and environmental assessment

* Subject to development and retail impact assessment

Table 62 - Summary of Mechanisms Recommended for Forster - Tuncurry

MECHANISM	OUTCOME	PHASING / COMMENCE	LEAD	STATUS
1. **Develop a Point of Difference** *To create a point of difference for Forster - Tuncurry that distinguishes it from other coastal areas and attracts desirable businesses.*	*The creation of a unique selling point for Forster - Tuncurry and the attraction of desirable business clusters.*	Commence 2009	**Lead:** Council and Great Lakes Tourism **In partnership with:** local business and community stakeholders	To be implemented
2. Sustainable Living *To balance the concept of sustainability so that it includes lifestyle and health living options in addition to the environment and economy.*	*A healthy and happy community that attracts businesses as a result of the health of the labour force and quality of the living and working environment.*	Commence 2010 and Ongoing	**Lead:** Council **In partnership with:** Hospital, local medical industry, NSW Dept. of Health	To be implemented
3. Broaden the Tourist Industry *To extend the tourist season so that it can attract a broader range of visitors and spread the economic flow on benefits to associated industries over a greater portion of the year.*	*An extended tourist season with a range of activities and attractions that encourages new visitors, a greater number of visitors and repeat visitors.*	Commence 2010	**Lead:** Council Marketing and Tourism Manager **In partnership with:** local tourist industry representatives, Mid North Coast Regional Tourism Organisation	Commenced

MECHANISM	OUTCOME	PHASING / COMMENCE	LEAD	STATUS
4. Access *To enhance the perception of unconstrained access within Forster - Tuncurry and to surrounding centres.*	*Suitable local and regional access that minimises business costs and maximises business opportunity.*	Commence 2009	**Lead:** Council **In partnership with:** RTA, Department of Environment and Climate Change	To be implemented
5. Education & Training *To enhance opportunities for younger residents to continue to live in Fortser-Tuncurry whilst continuing their education and expanding their skill set. To promote life long learning opportunities and re-skilling for existing residents.*	*Forster - Tuncurry becomes a focal point in the Great Lakes LGA and Mid North Coast Region for education and training in relation to environmental, economic and social sustainability with future employment prospects.*	Ongoing	**Lead:** Council **In partnership with:** North Coast Institute of TAFE, University of Newcastle	Commenced
6. Government Support *To promote government support for services in Forster - Tuncurry in light of its designation as a place of significant urban growth.*	*Forster - Tuncurry maintains its "Market Share" of state and local government services with respect to its population share.*	Commence 2010	**Lead:** Council **In partnership with:** relevant State (i.e. DSRD), Federal Agencies and Hunter Business Centre	Commenced
7. Subsidised Workspace *To provide a range of employment floorspace*	*A culture of support for starter businesses that attracts new businesses and in turn leads to local*	Commence 2011	**Lead:** Council **In partnership with:** Private	To be implemented

MECHANISM	OUTCOME	PHASING / COMMENCE	LEAD	STATUS
including subsidised or sub market rent.	*business and employment growth.*		and Government Developers, Hunter Business Centre	
8. Business Precinct Plans *To support the long term economic sustainability of Forster - Tuncurry's Villages.*	*A range of healthy and sustainable retail, commercial and service centres that meet the needs of local residents, employees and visitors to Forster - Tuncurry.*	2009 – 2011 with ongoing review	**Lead:** Council **In partnership with:** Chamber of Commerce, Local Business Tenants and Landlords, Forster Waterside, DSRD	Commenced
9. Fiscal Incentives *To provide fiscal incentives to attract businesses to Forster - Tuncurry or the extension of existing businesses.*	*A package of reasons (including fiscal) that attract desirable businesses to Forster - Tuncurry.*	Phased introduction from 2011 with regular review	**Lead:** Council **In partnership with:** State (i.e. DSRD) and Federal Government Departments	To be implemented
10. Create a Supportive Planning Process *To enhance the perception of, and certainty in the local development assessment process to encourage business confidence and reduce relocation and/ expansion risks / delays.*	*Enhanced joint working with businesses and greater attraction to doing business with Great Lakes Council / Investing in Forster - Tuncurry.*	Commence 2009 and ongoing	**Lead:** Council **In partnership with:** all Council departments, Councillors and DoP	Commenced

MECHANISM	OUTCOME	PHASING / COMMENCE	LEAD	STATUS
11. Make Forster Urban Chic *To enhance the cultural and recreational appeal of Forster - Tuncurry to a range of age groups.*	*A greater number of tourists with a broader range of activities as well as reinvigorated interest in living and working in the area by a range of age groups.*	Commence 2010 – 2012 and ongoing	**Lead:** Council **In partnership with:** Forster - Tuncurry Community, Local Arts Community	Commenced
12. Tell the World! *Prepare a tailored marketing and advertising campaign for Forster – Tuncurry.*	*Increased awareness across NSW of the benefits of not only holidaying in Forster - Tuncurry but also living, working and operating a successful business.*	Commence 2011 and ongoing	**Lead:** Council **In partnership with:** Advertising consultant, Mid North Coast Regional Tourism Organisation, DSRD and local businesses	To be implemented
13. Monitor and Review Monitor and *review the strategies and outcomes of the Employment Lands Implementation Strategy and amend where appropriate.*	*An effective and up to date Implementation Strategy that anticipates and plans for desirable change rather than reacting to it.*	Commence 2014 and Ongoing	**Lead:** Council	To be Commenced

APPENDIX 1 - PLAN OF PROPOSED CENTRES AND EMPLOYMENT LANDS

The following plans detail the proposed centres and employment lands within the Forster – Tuncurry Area, together with their proposed zoning and FSR. The plans are based on the Great Lakes Local Environmental Plan 1996 zoning plans as of November 2008.

DISCLAIMER

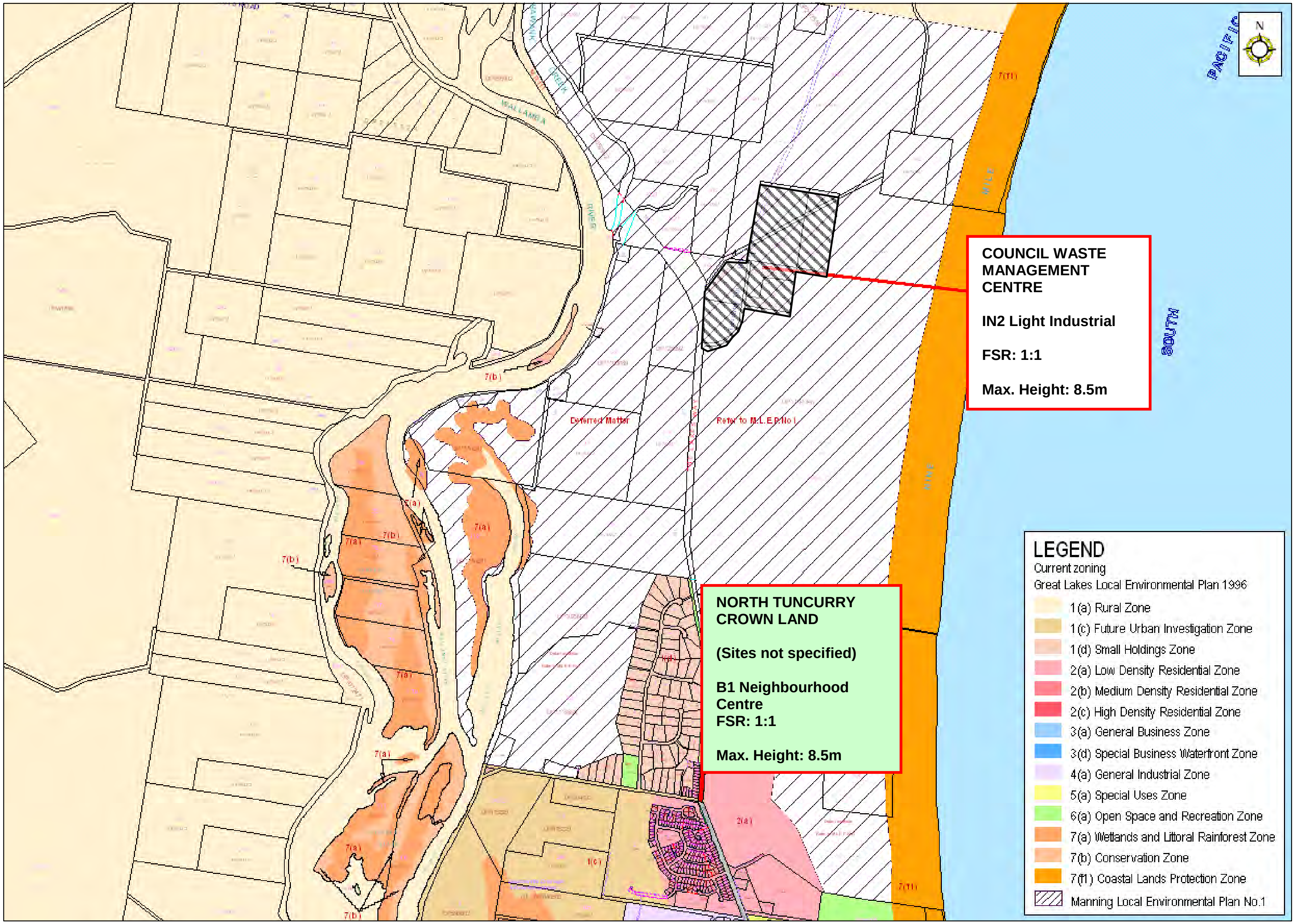
This report is for the confidential use only of the party to whom it is addressed (the client) for the specific purposes to which it refers. We disclaim any responsibility to any third party acting upon or using the whole or part of its contents or reference thereto that may be published in any document, statement or circular or in any communication with third parties without prior written approval of the form and content in which it will appear.

This report and its attached appendices are based on estimates, assumptions and information sourced and referenced by Hill PDA and its sub consultants. We present these estimates and assumptions as a basis for the reader's interpretation and analysis. With respect to forecasts we do not present them as results that will actually be achieved. We rely upon the interpretation of the reader to judge for themselves the likelihood of whether these projections can be achieved or not.

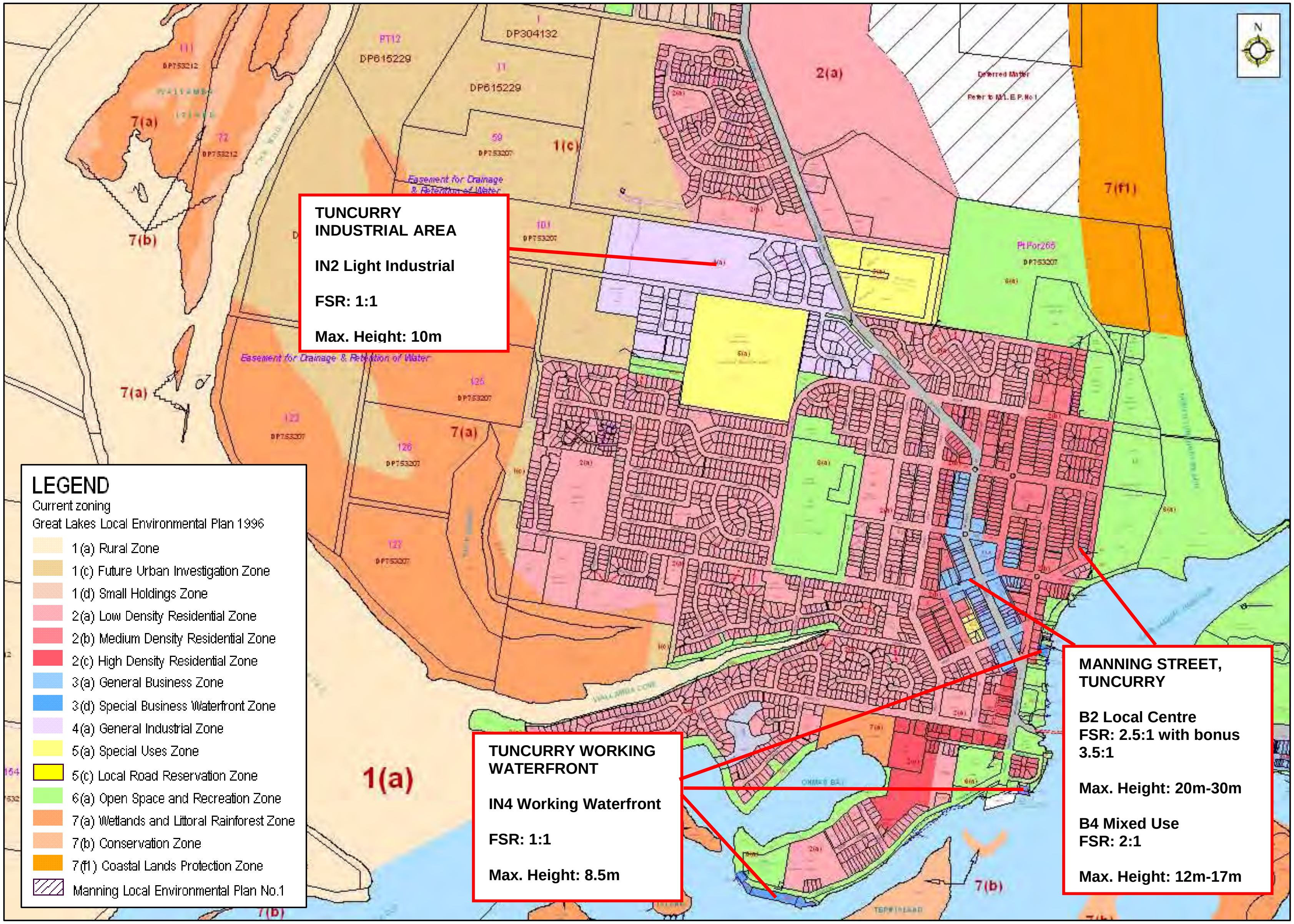
As is customary, in a report of this nature, while all possible care has been taken by the authors to prepare the attached financial models from the best information available at the time of writing, no responsibility can be undertaken for errors or inaccuracies that may have occurred both with the programming or the financial projections and their assumptions.

This report does not constitute a valuation of any property or interest in property. In preparing this report we have relied upon information concerning the subject property and/or proposed development provided by the client and we have not independently verified this information excepted where noted in this report.

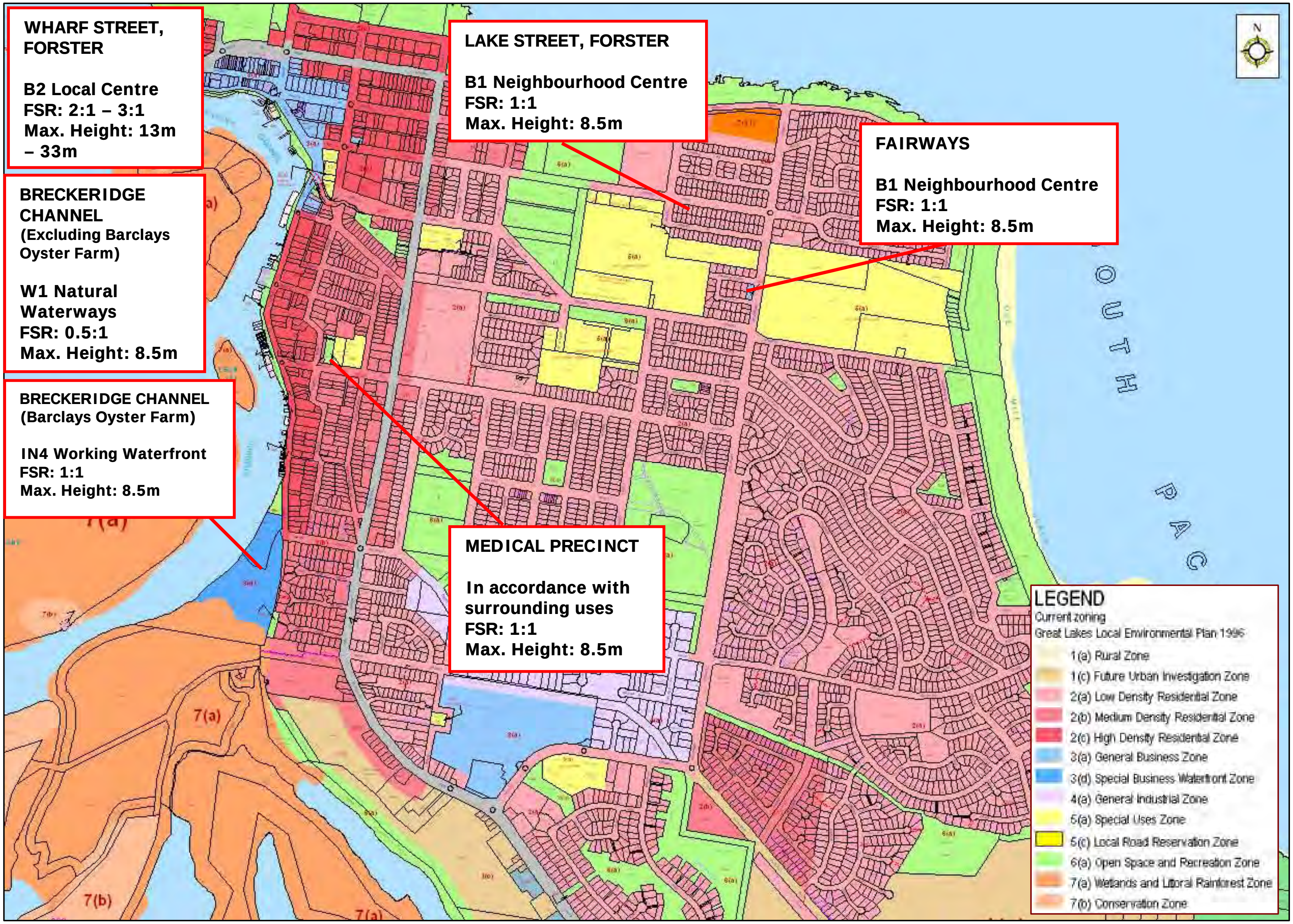
Tuncurry (A): Great Lakes LEP 1996 Zoning Plan Overlayed with Proposed Centres, Employment Lands Zone & FSR



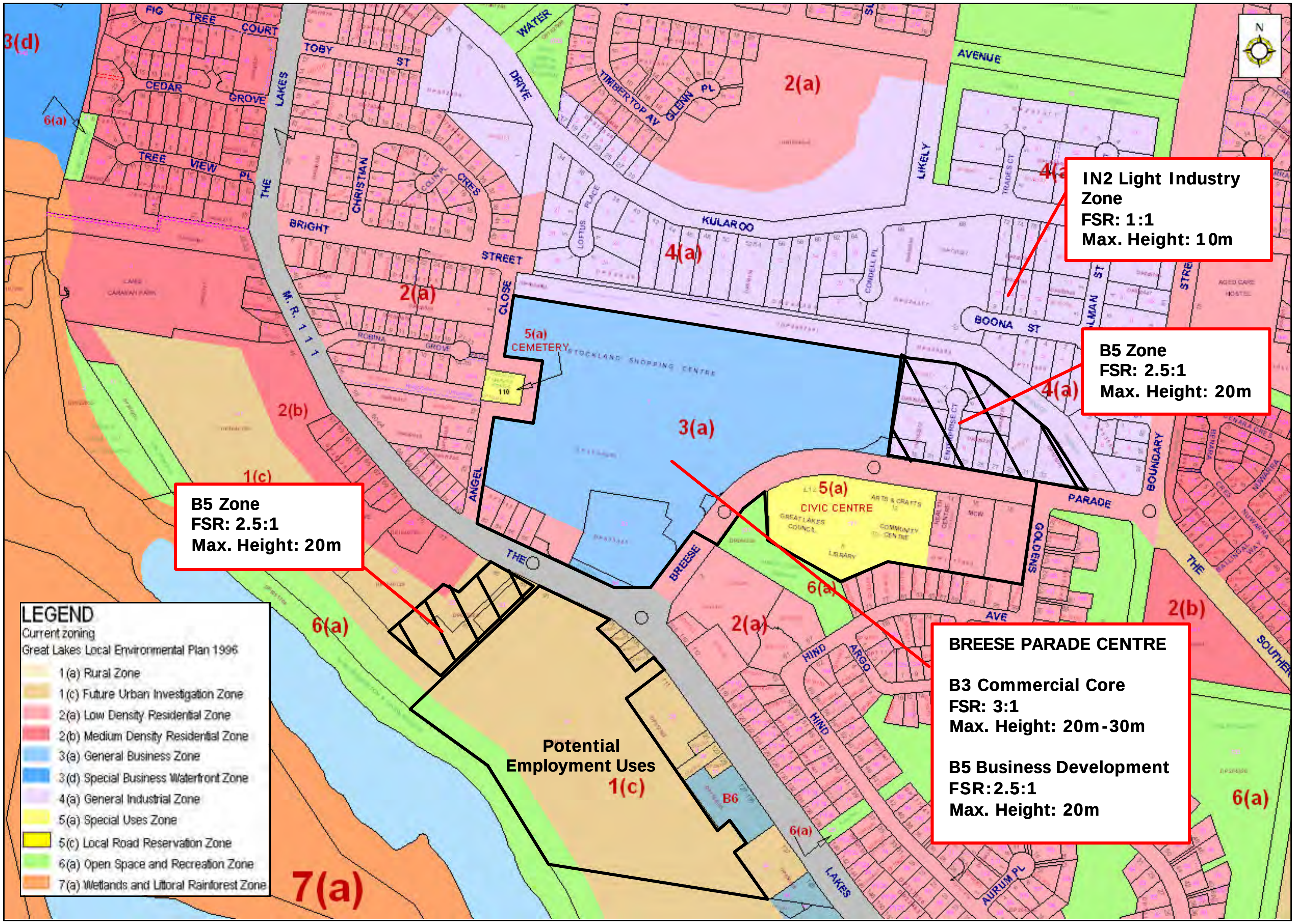
Tuncurry (B): Great Lakes LEP 1996 Zoning Plan Overlayed with Proposed Centres, Employment Lands Zone & FSR



Forster (A): Great Lakes LEP 1996 Zoning Plan Overlayed with Proposed Centres, Employment Lands Zone & FSR



Forster (B): Great Lakes LEP 1996 Zoning Plan Overlayed with Proposed Centres, Employment Lands Zone & FSR



Forster (C): Great Lakes LEP 1996 Zoning Plan Overlayed with Proposed Centres, Employment Lands Zone & FSR