School Road, Forbes

Social and Economic Impact Assessment

Prepared for
ForbesView Pty Ltd

September 2023

HillPDA CONSULTING

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Reviewer

Signature		Dated	27/09/2023

Report details

Job number	P23093
Version	1.1
File name	P23093 - Forbes School Road Planning Proposal SEIA v1.1
Date issued	27 September 2023

EXECUTIVE SUMMARY

This social and economic impact assessment (SEIA) report has been prepared for ForbesView Pty Ltd to accompany a planning proposal for a site northwest of Forbes' centre, in NSW's Central West region.

The planning proposal and indicative masterplan pertain to a 92 hectare site, with an indicative yield of 745 dwellings, enabling an estimated population of 1,560 residents at full development. The proposal would also provide retail and commercial space in a neighbourhood centre, around ten hectares of open space and natural areas, play and recreation space, and active transport routes.

This SEIA has been prepared to assess the likely housing, social infrastructure and economic implications of the planning proposal and provide any recommendations for how any identified benefits could be enhanced, and mitigations or management measures for any identified impacts.

Background and social baseline

To inform the SEIA, we completed a review of the planning context as it relates to Forbes and the site and assessed the social baseline of the local community, noting that:

- Both the site and Forbes' north more broadly have been flagged for future residential development in strategic planning work undertaken and consulted on by Council.
- Council has completed works in understanding and planning for social infrastructure provision across the LGA, particularly with regard to open space and recreation.
- The LGA's population is similar in age structure the Rest of NSW, though with more children and teenagers, and a larger proportion of older residents. It also has a significant Aboriginal population.
- Forbes hosts strong local employment and anchor industries, and recorded lower unemployment rates than NSW as a whole. Despite this, household incomes were lower than typically recorded across the Rest of NSW.
- Parts of Forbes have high levels of socio-economic disadvantage.

We also assessed household, dwelling, and population projections in Forbes, noting that Forbes is anticipated to experience significant population and housing demand growth over the coming years. We found:

- Most households consisted of only one or two people.
- The vast majority of dwellings in Forbes were separate houses, with few apartments or semi-detached dwellings.
- Only 20 per cent of dwellings had two or fewer bedrooms.
- Rent and mortgage repayments in Forbes were lower than those recorded across NSW as a whole.
- Projections indicate an additional 3,900 people will live in Forbes by 2041.
- Between 1,800 and 2,100 additional dwellings (approximately) will be necessary to house this additional population, and many of these will need to be diverse housing to meet the needs of smaller households.
- At present, housing delivery in Forbes is not meeting this need.

Findings

Community needs assessment

The report also provides a social infrastructure audit and community needs assessment, following from the findings of the previous sections. The key findings were:

- The existing supply of social infrastructure in Forbes – particularly sporting open space and education facilities – is more than sufficient to support the community.
- Though Forbes has a relatively small population, it hosts social infrastructure assets including a library, community centre, TAFE NSW campus, and public hospital.
- Based on the indicative masterplan for the site, we anticipate that the proposal would deliver a resident population of around 1,560 people.
- Much of the additional demand for social infrastructure from the proposal would be accommodated by the existing provision within Forbes.
- The significant open space and recreation assets proposed to be delivered as part of the proposal would significantly improve access for existing and future residents of Forbes' north
- The Forbes community needs additional housing supply. In particular, there is a strong need for smaller housing, including traditional detached dwellings on smaller lots and well-located semi-detached and attached dwellings.

Economic impacts

A detailed assessment of retail demand and economic impact of the proposal was also undertaken. The key findings include:

- The population of the trade area of the proposal is sufficient to enable the proposed neighbourhood centre.
- The centre would allow residents at the site to fulfil their day-to-day needs, whilst having minimal impact on the existing Forbes centre.
- During construction, the proposal would support 5,161 job years (directly and indirectly).
- Once operational, the proposal would support 122 full-time equivalent jobs at the site, a major benefit to the local area.
- Both the construction and operational phases would result in positive flow-on effects for the local economy.

Social impacts

The SEIA also includes a detailed social impact assessment, which identifies potential social impacts and benefits that may arise from the proposal, across the construction and operational phases.

Overall, we anticipate that the proposal would lead to few significant social impacts whilst resulting in several significant social benefits. The social impacts projected to arise from the proposal are largely considered to be typical of any development activity, and appropriate mitigation and management measures would also be typical. These would generally be sufficient to reduce the significance of social impacts arising from the proposal.

We anticipate that the proposal would lead to **social impacts of medium significance** through:

- Construction noise and vibration
- Additional traffic
- Land clearing and changes to surroundings
- Changes to community cohesion
- Increased demand for social infrastructure.

With typical mitigation and management measures, these potential impacts would be able to be reduced to a **low level of significance**. We anticipate that residual **social impacts of medium significance** would arise through additional traffic and changes to surroundings.

In terms of social benefits, we anticipate that the proposal would lead to **social benefits of medium significance** through:

- Improved access to social infrastructure
- Improved access to shops and services
- Improvements to surroundings through landscaping and tree planting.

Further, we anticipate that the proposal would lead to **social benefits of high significance** through:

- Improvements to livelihoods through employment opportunities (during construction and operation)
- The provision of additional housing supply and dwelling diversity in Forbes
- Improved access to active transport infrastructure.

Conclusion

We consider that the proposal is likely to have a small number of potential negative social and economic impacts, which are common to any development and are largely able to be sufficiently mitigated. The potential social and economic benefits of the proposal are greater in number and are assessed as being of higher significance.

The potential social impacts and benefits of the proposal must, however, be contextualised. Forbes' housing market has an identified and long-term requirement for additional housing. Addressing this need will require new dwellings, services, and infrastructure to be delivered in Forbes. Therefore, many of the potential social impacts identified in this report are likely to occur in Forbes whether the proposal proceeds or not.

We consider that the proposal presents significant opportunities to deliver social benefits and minimise the risk and scale of any impacts associated with meeting Forbes' housing needs in the short and long term. The proposal would deliver diverse housing supply, open space, and benefits to active transport, and would align with Council's vision for the Forbes Shire.

Overall, on social and economic grounds, we consider that the proposal represents a net benefit to the Forbes community.

INTRODUCTION

1.0 INTRODUCTION

1.1 Acknowledgement of Country

The site and the Forbes Shire are located on the traditional lands of the Wiradjuri people.

In the spirit of reconciliation, HillPDA wishes to acknowledge this and to pay our respect to the Wiradjuri people and their ongoing connection to the land that this report pertains to.

1.2 The site

The site is located northwest of the Forbes centre. It consists of an agglomeration of ten lots, and covers an area totalling around 92 hectares. Figure 1 shows the site and its immediate surrounds.

Figure 1: The site

Source: HillPDA, Google Maps (2022)

The site is located to the northwest of the Forbes town centre, immediately adjacent to the edge of Forbes' existing urban footprint. The site is surrounded by a variety of land uses and facilities, as summarised below:

- North: School Road, agricultural land (cropping) and associated rural-residential dwellings, some large lot residential development.
- East: Farnell Street and large lot residential development, and to the southeast, a larger agricultural landholding and associated dwelling.
- South: Morton Street and several rural-residential lots.
- West: Edward Street, agricultural land (cropping) and associated dwelling, a residential aged care facility, and the Goldridge Estate residential development (currently being developed by Forbes Shire Council).

The site currently supports agricultural and rural residential land uses, including one resident household.

1.3 The proposal

The proposal seeks to rezone the site to enable redevelopment of the site for mainly residential purposes, as well as retail and commercial uses within a village centre style shopping precinct. The proposal would implement minimum lot sizes of 250 square metres around the village centre, and 400 square metres elsewhere. These lot sizes have been determined in collaboration with Forbes Shire Council, and are deemed appropriate for the setting and desired housing diversity for the area.

The draft masterplan provides for an anticipated residential yield of around 750 lots. It also incorporates areas for conservation, open space and recreation areas, and active transport infrastructure.

The indicative masterplan would be delivered in a staged manner over a 10-15 year period. Subject to market conditions, the proponent anticipates delivering approximately 30 to 60 lots per stage.

An overview of the indicative masterplan is shown in Figure 2.

Figure 2: Indicative masterplan for the site

Source: Allera (2023)

PLANNING CONTEXT

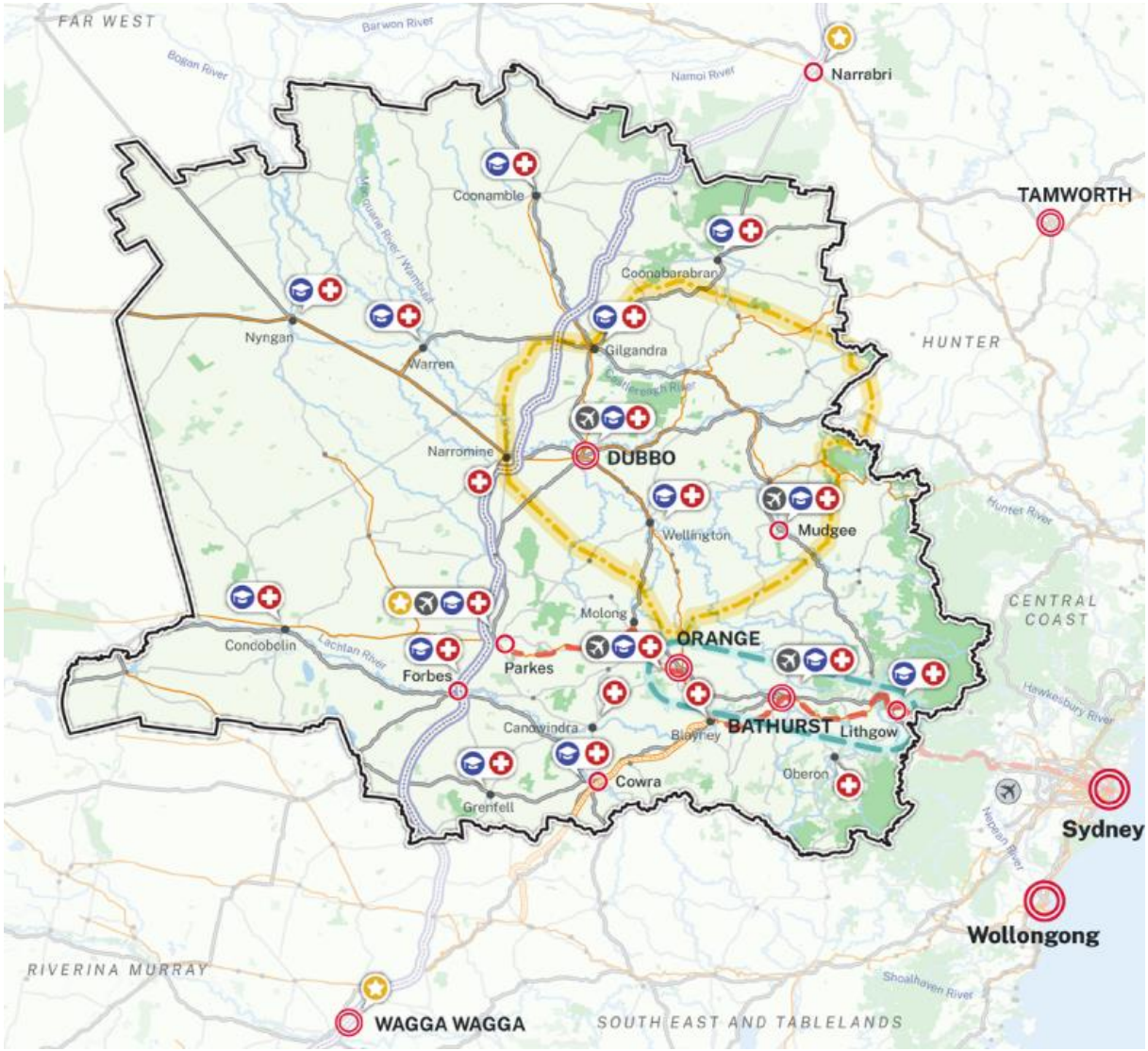
2.0 PLANNING CONTEXT

2.1 Central West and Orana Regional Plan

In December 2022, the NSW Department of Planning and Environment (DPE) published the *Central West and Orana Regional Plan 2041* (the Regional Plan) as part of its suite of regional plans for NSW.

The Regional Plan is for the Central West and Orana region (shown in Figure 3), of which Forbes is one of five identified 'strategic centres', playing a supportive role to the 'regional cities' of Bathurst, Dubbo, and Orange. These cities and centres are identified as locations where population growth and economic development will be focused within the Central West and Orana region.

Figure 3: The Central West and Orana region



Source: NSW DPE (2022)

In addition to the above, the Regional Plan identifies a range of objectives and strategies to guide strategic planning in the region. A selection of objectives and strategies considered directly relevant to this proposal are shown in Table 1.

Table 1: Selected objectives and strategies, Central West and Orana Regional Plan 2041

Objectives	Strategies
Objective 6: Support connected and healthy communities	**Strategy 6.1:** Undertake public space needs analyses and develop public space strategies by: • exploring new public space opportunities and green infrastructure in accordance with the Government Architect NSW's Greener Places and Better Placed, Designing with Country discussion paper, the Streets as Shared Spaces program and Everyone Can Play • considering the needs of future and changing populations • identifying opportunities to prioritise new and improved quality public space to areas of most need; incorporate natural drainage features within public spaces and linking them with green infrastructure networks; improve walking and cycling connections to public space; and enhance tree canopy across the private domain. **Strategy 6.2:** Strategic planning and local plans should consider opportunities to: • ensure new residential areas provide sufficient public and open space and link to existing pedestrian and cycle networks • demonstrate how the quantity of, and access to, high quality and diverse existing public space is maintained, embellished and improved.
Objective 7: Plan for resilient places and communities	**Strategy 7.1:** Reducing the level of vulnerability and risk for communities will involve early consideration of natural hazards and avoidance and mitigation for both existing and new development areas. To achieve this strategic and local planning must: • design communities that integrate, protect and deliver green infrastructure networks at the precinct and landscape scales to help avoid new hazards such as the urban heat island effect. **Strategy 7.3:** Strategic planning and local plans should encourage: • energy efficient building design and practices that respond to the natural environment.
Objective 12: Sustain a network of healthy and prosperous centres	**Strategy 12.4:** Use strategic planning and local plans to strengthen connectivity within centres by: • improving and establishing connected and accessible green walking and cycling networks that are integrated with public transport facilities • separating cycling network from road and pedestrian walkway, where possible • widening footpaths and building cycle infrastructure, all weather protection, shade, lighting, and supportive street furniture. • better integrate walking and cycling networks into the design of new communities.
Objective 13: Provide well located housing options to meet demand	**Strategy 13.1:** To ensure an adequate and timely supply of housing, in the right locations, strategic and local planning should: • respond to environmental, employment and investment considerations, and population dynamics when identifying new housing opportunities • consider how proposed release areas could interact with longer term residential precincts • provide new housing capacity where it can use existing infrastructure capacity or support the timely delivery of new infrastructure • identify a pipeline of housing supply that meets community needs and provides appropriate opportunities for growth. **Strategy 13.3:** Use strategic planning and local plans to facilitate a diversity of housing in urban areas by: • Creating flexible and feasible planning controls, including a greater mix of housing in new release areas.
Objective 14: Plan for diverse, affordable, resilient and inclusive housing	**Strategy 14.1:** To improve housing diversity, strategic and local planning should: • allow a diversity of housing, including affordable housing, student housing, shop top housing, more dense housing types and housing choices for seniors close to existing services, and on land free from hazards. **Strategy 14.2:** Plan for a range of sustainable housing choices in strategic planning and local plans including: • a diversity of housing types and lot sizes, through appropriate development standards, including minimum lot sizes, minimum frontage and floor space ratio.

Objectives	Strategies
Objective 15: Manage rural residential development	**Strategy 15.1:** When planning for new rural residential development consider: • proximity to existing urban settlements to maximise the efficient use of existing infrastructure and services • future growth opportunities of the closest local centre, nearby urban land uses and any across LGA-boundary landuse compatibility issues • context in terms of supply and demand across the subregion • cost effective service supply. **Strategy 15.2:** Enable new rural residential development only where it has been identified in a local strategy prepared by the relevant council and endorsed by the department. Avoid unplanned or unsupported rezoning of rural land.

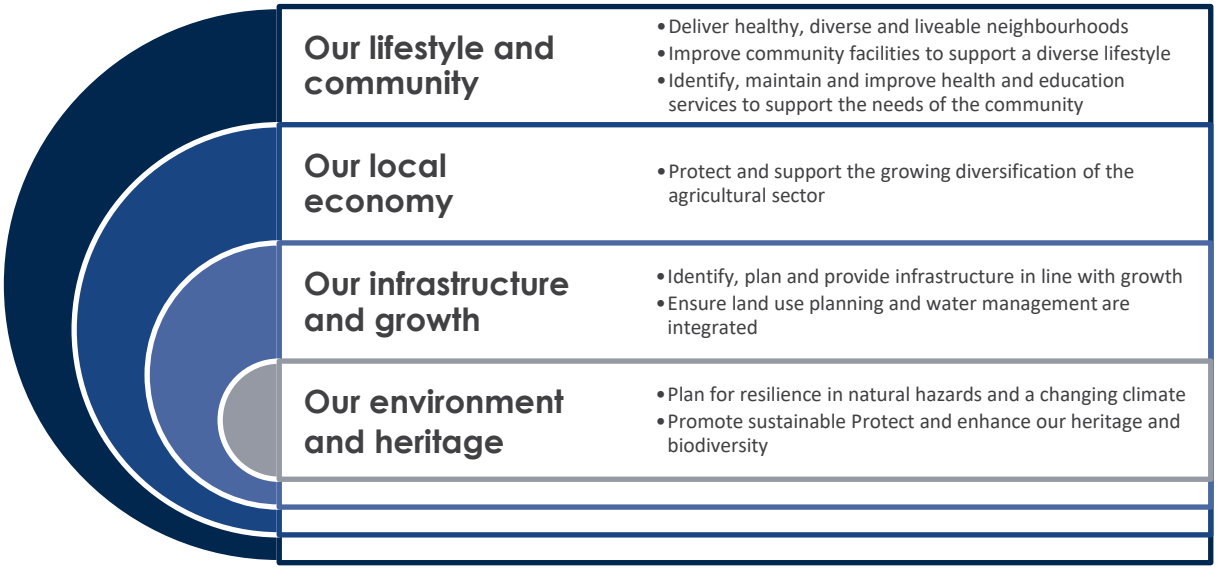
Source: NSW DPE (2022)

2.2 Forbes Local Strategic Planning Statement

Council adopted the *Forbes Local Strategic Planning Statement* (LSPS) in July 2020. It represents a 20-year vision for the future of the Forbes Shire, outlining planning priorities for the area and the actions required to achieve them.

The LSPS has four themes and 12 planning priorities that are reflective of the community's vision for the future of Forbes, based on extensive consultation with the community and other stakeholders. Selected LSPS priorities that are relevant to the proposal are shown in Figure 4.

Figure 4: Selected themes and planning priorities, Forbes LSPS



Source: Forbes Shire Council (2020)

Of particular relevance to the site, Priority LC1 ("deliver healthy, diverse and liveable neighbourhoods"), includes an action develop a Local Housing Strategy (refer following section), and includes a map of residential development options. The site is included in an area marked 'Residential Investigation Area'. It also notes the importance of ensuring that residential land development in Forbes balances environmental constraints such as flooding.

2.3 Forbes Housing Strategy

Council adopted the *Forbes Housing Strategy*, a local housing strategy for the Forbes Shire (the LHS), in May 2023. Developing an LHS was one of the key actions in the LSPS (refer previous section).

The LHS is a 20-year plan for meeting the housing needs of the Forbes Shire. It was developed in consultation with the community and other stakeholders, and it outlines a range of actions that will be taken to achieve its goals. The LHS describes three strategic directions for future housing growth in the Forbes Shire:

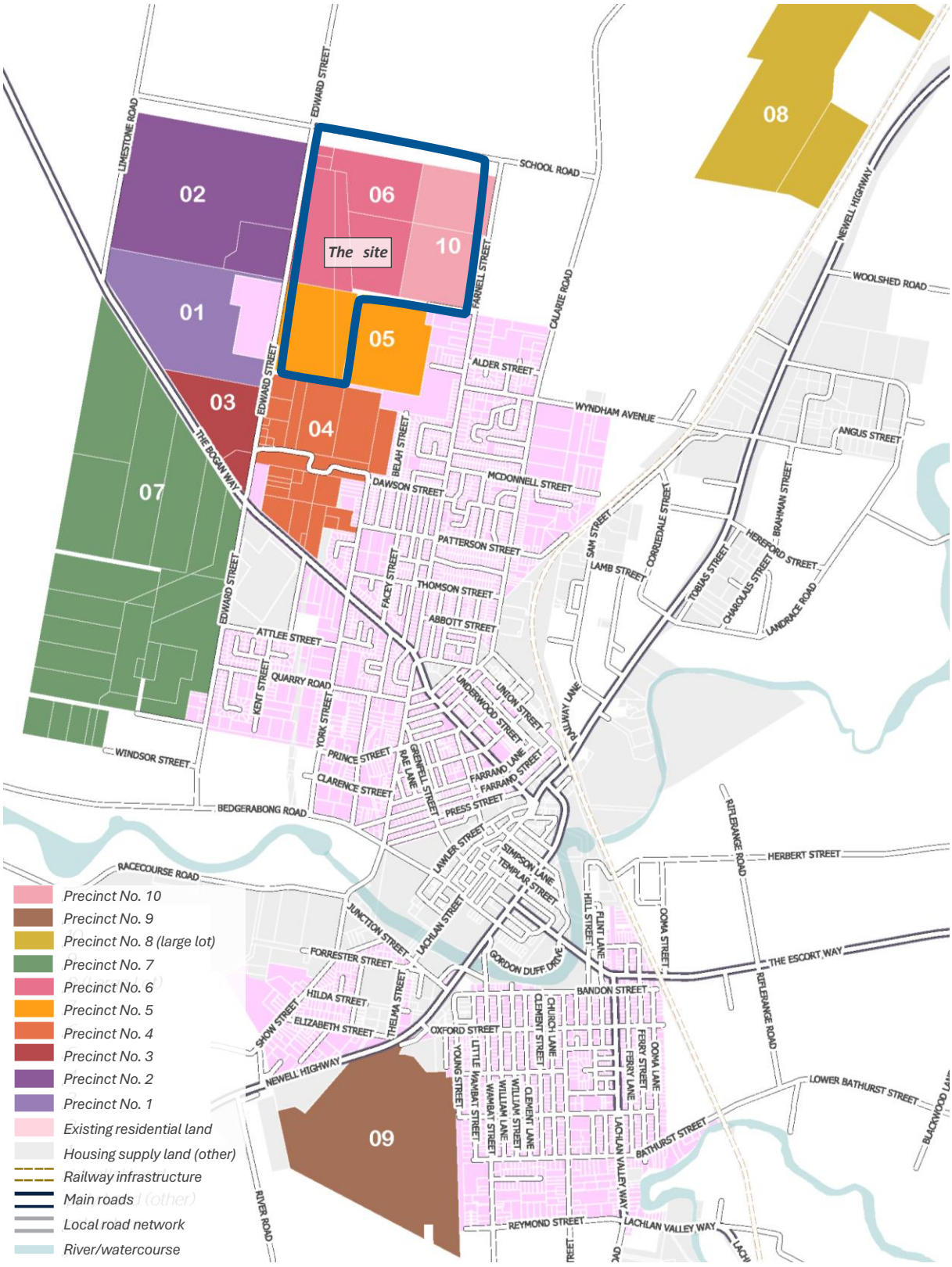
1. **Direct housing growth**
   Direct housing growth to appropriate locations in response to opportunities and constraints.
2. **Prepare a Staging Plan**
   Package land for residential release in stages to ensure efficient augmentation of services and infrastructure and subsequent land development.
3. **Strengthen connections**
   Increase the attraction and connection of the Forbes Town Centre and Lake Foreshore to new housing estates and neighbourhoods.
4. **Increase housing choice**
   Plan for more housing choice to support a diversifying community, with particular emphasis on more compact housing and more affordable housing.
5. **Create resilient neighbourhoods**
   Design housing and neighbourhoods to be 'greener' and more resilient to environmental change.
6. **Show leadership**
   Show leadership through the development of strategic development sites.

In alignment with the priorities, the LHS provides a strategic evaluation of potential urban growth areas in Forbes, identifying ten areas to be evaluated as future residential land and developing a staging plan to manage supply and demand and timing the release of new land. The site is located across three of these areas, as shown in Figure 5, which were considered to be largely unconstrained and suitable for future residential development.

The site is also shown as future residential development land in the urban area framework plan provided in the LHS. The framework plan notably also includes an indicative neighbourhood retail centre in the future residential land to Forbes' northwest, though not within the area the site occupies.

Further to the above, the LHS includes a Staging Plan to direct the release of land in response to demand projections, as shown in Figure 6. The Staging Plan provides an indicative land release program that would meet the demand identified in the LHS. The site is shown within 'Stage 4', to be released in 2036. The LHS notes, however, that the plan forms a "starting basis" to guide decision making by Council, and that other factors will influence the timing of land release. Overall, the Staging Plan and other aspects of the LHS provide a clear indication of Council's intent to enable growth in Forbes' north.

Figure 5: Forbes urban growth site suitability analysis map



Source: Forbes Shire Council (2023)

Figure 6: Forbes urban land staging plan

Source: Forbes Shire Council (2023)

2.4 Forbes Recreation and Open Space Strategy 2021

Forbes adopted the Forbes Recreation and Open Space Strategy 2021 (the ROSS) in July 2021.

The ROSS is a 20-year plan for the development and management of recreation and open space areas and facilities in the Forbes Shire. It identifies a number of key directions for recreation and open space in Forbes Shire, as shown in Table 2.

The ROSS also includes an assessment of all Council open space and recreation assets and future directions for each, as well as benchmark provisioning, access and embellishment measures to aid in assessing the supply of these facilities.

Table 2: Key directions for recreation and open space, Forbes ROSS

Direction	Detail
Access and equity	• A clear difference exists between the quality of parks in the central and southern end of Forbes town compared to the north.
Asset management	• Many park embellishments are aged, in need of repair and/or are largely unappealing.
Undeveloped open space and rationalisation	• Forbes has more than enough open space to meet current and future demand. • A number of undeveloped parks are recommended for rationalisation, with funds generated put back into further development and upgrade of the open space network.
Play opportunities	• While many parks have simple (off-the-shelf) playground equipment installed, the Shire lacks modern, innovative play nodes that create challenge and adventurous spirit for users and champion nature play.
Sport infrastructure	• Much of the infrastructure across the sporting network is of a suitable standard. • Council takes pride in the quality of sporting facilities it provides for residents and visitors.
Shade and irrigation	• With the extreme temperatures that Forbes faces in the warmer months it is important that both natural and built shade is provided in both recreation parks (at play nodes and picnic areas) and at sport parks (at key gathering areas). • Similarly, to ensure that all parks are inviting, irrigation should be considered for all forms of park (both recreation parks and sporting fields).
Council resourcing	• Council will require additional staff resources to lead implementation of this Strategy (and the existing suite of similar plans and strategies).

Source: Forbes Shire Council (2021)

SOCIAL BASELINE

3.0 SOCIAL BASELINE

This chapter outlines the social impact assessment method applied in chapter 7.0 of this report and describes the site's 'social baseline'.

The social baseline describes the social context surrounding the site in 'baseline' terms – that is, without the proposal. Developing a social baseline provides SIA practitioners with a benchmark against which the changes proposed by a development or project can be considered.

Understanding the existing social environment is critical to considering how any predicted impacts would be experienced by the community. This is because demographic factors can affect the nature and significance of potential social impacts. For example, where the social baseline indicates that a community may have less capacity to respond or adapt to major changes, a social impact may be of increased significance.

3.1 Social impact assessment method

The social impacts that may arise from the proposal will be influenced by the baseline situation, the eventual consequences of the proposal, and measures put in place to mitigate against any negative impacts and enhance positive impacts.

The assessment is informed by the analysis within this report and scoping of potential impacts. Our methodology has been designed with reference to social impact assessment best practice, and to align with DPE's *Social Impact Assessment Guidelines for State Significant Projects* (2023).

Figure 7 shows an overview of the SIA process used to inform this chapter.

Figure 7: SIA process

Source: HillPDA, DPE (2023), *Social Impact Assessment Guideline*.

3.1.1 What are social impacts?

A social impact can be defined as the net effect of an activity on a community and the wellbeing of individuals, families, and other groups within the community. Social impacts may occur across a range of aspects of an individual's and a community's life, as shown in Figure 8.

Figure 8: Types of social impact

way of life	how people live, how they get around, how they work, how they play, and how they interact on a daily basis
community	composition, character, cohesion, function, and sense of place
access	how people access and use infrastructure, services and facilities, whether provided by local, state, or federal governments, or by for-profit or not-for-profit organisations or groups
culture	both Aboriginal and non-Aboriginal culture, including shared beliefs, customs, values, and stories, and connections to country, land, waterways, places, and buildings
health and wellbeing	physical and mental health, especially for those who are highly vulnerable to social exclusion or substantial change, plus wellbeing of individuals and communities
surroundings	access to, and use of, services that ecosystems provide, public safety and security, access to and use of the natural and built environment, and its aesthetic value and amenity
livelihoods	people's capacity to sustain themselves, whether they experience personal breach or disadvantage, and the distributive equity of impacts and benefits
decision-making systems	whether people experience procedural fairness; can make informed decisions; have power to influence decisions; and can access complaint, remedy and grievance mechanisms

Source: Adapted from DPE (2023), *Social Impact Assessment Guideline*.

3.1.2 Scoping

Should the proposal be constructed, the social impacts that may arise would be influenced by:

- The social and geographic context of the site
- The construction process, final built form, and operations of the proposal
- Any measures put in place to mitigate against identified negative impacts and enhance positive impacts.

Social impacts arising from a development may be positive, negative, and cumulative. Table 3 provides an overview of how these different impacts can present.

Table 3: Types of social impacts

Type of impact	High level scoping of issues
Negative social impacts	Negative social impacts result from changes to the physical or social fabric that make it worse (in any of the impact categories) than before the project took place. These may include: • Increased dust or noise levels affecting health • Decreased amenity during construction • Alterations to community character through land use changes.
Positive social impacts	Positive social impacts result from changes to the physical or social fabric that make it better (in any of the impact categories) than before the project took place. These may include: • Increased access to jobs in the local area • Improved amenity through provision of open space • Stronger sense of community through provision of community space.
Cumulative social impacts	Cumulative social impacts result from changes to the physical or social fabric that occur from multiple projects or activities that need similar resources or affect similar impact categories. These may include: • Increased traffic level from construction vehicles for multiple projects in one area • A shortage of workers in an area due to multiple similar projects • Health impacts from persistent noise or dust levels due to ongoing projects.

Source: HillPDA, DPE (2023), *Social Impact Assessment Guideline.*

3.1.3 Predicting and evaluating impacts

The impact assessment framework presented in this report identifies and evaluates changes to the social baseline due to the proposal. This includes the assessment of positive, negative, and cumulative impacts as outlined in section 3.1.2. Changes can be tangible or intangible; qualitative or quantitative; direct or indirect; and subjectively experienced.

The likelihood of social impacts arising from each matter is assessed as part of the scoping process. Where there is an identified potential for social impacts, an evaluation is made. Professional judgement and experience is applied on a case-by-case basis to identify the significance of impact on the social environment.

The likelihood of a potential impact arising from the proposal is a primary element of considering each social impact and its risk rating. The criteria used to determine the likelihood of any potential impact are indicated in Table 4.

Table 4: Likelihood of impact

Likelihood	Description	Indicative probability
Almost certain	Definite or almost definitely expected	Greater than 90 per cent
Likely	High probability	70 per cent
Possible	Medium probability	50 per cent
Unlikely	Low probability	30 per cent
Very unlikely	Improbable or remote possibility	Less than 10 per cent

Source: DPE (2023), *Social Impact Assessment Guideline*. Adapted from Esteves A.M.et. al. (2017)

The magnitude of a potential impact is a key consideration to determine a risk rating. In determining the magnitude of a potential impact there are five key characteristics that must be considered, as shown in Table 5.

Table 5: Dimensions of social impacts

Characteristic	Details needed to enable assessment
Extent	Who is expected to be affected? Will any vulnerable groups be impacted? Which locations and people are affected?
Duration	When is the impact expected to occur? Will it be temporary or permanent?
Intensity or scale	What is the likely scale or degree of change?
Sensitivity or importance	How sensitive/vulnerable or adaptable/resilient are affected people to the impact, or (for positive impacts) how important is it to them?
Level of concern/interest	How concerned or interested are people?

Source: DPE (2023), *Social Impact Assessment Guideline*. Adapted from Esteves A.M.et. al. (2017)

Table 6 below identifies the overall magnitude level of impact rating.

Table 6: Magnitude of impact

Magnitude	Description
Minimal	No noticeable change experienced by people in locality.
Minor	Mild deterioration/improvement, for a reasonably short time, for a small number of people who are generally adaptable and not vulnerable.
Moderate	Noticeable deterioration/improvement to something that people value highly, either lasting for an extensive time, or affecting a group of people.
Major	Substantial deterioration/improvement to something that people value highly, either lasting for an indefinite time or affecting many people in a widespread area.
Transformational	Substantial change experienced in community wellbeing, livelihood, amenity, infrastructure, services, health and/or heritage values; permanent displacement or addition of at least 20% to a community.

Source: DPE (2023), *Social Impact Assessment Guideline*. Adapted from Esteves A.M.et. al. (2017)

Once the likelihood and magnitude of a potential impact is determined, a level of significance can be assigned. This is undertaken as per Table 7.

Table 7: Social impact significance matrix

		Magnitude				
		Minimal	Minor	Moderate	Major	Transformational
Likelihood	Almost certain	Low	Medium	High	Very high	Very high
	Likely	Low	Medium	High	High	Very high
	Possible	Low	Medium	Medium	High	High
	Unlikely	Low	Low	Medium	Medium	High
	Very unlikely	Low	Low	Low	Medium	Medium

Source: Adapted from DPE (2023), *Social Impact Assessment Guideline.*

3.1.4 Social impact management

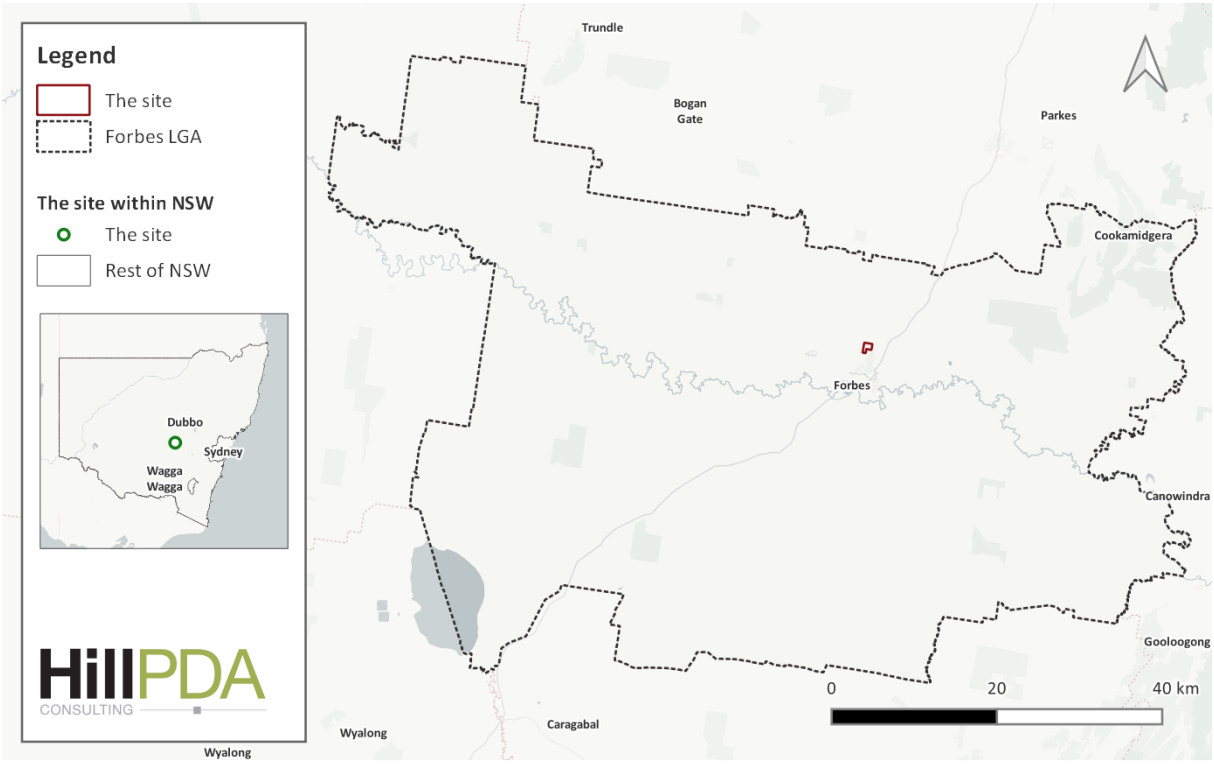
Where impacts are identified, the SIA provides mitigation and/or enhancement measures. For potential negative impacts, measures are identified to avoid or minimise impacts by amending the project or its delivery. For potential positive social impacts, the SIA identifies measures to enhance the benefit of that impact. Social impact management is an ongoing process.

3.2 Study area

The study area for the site has been defined as the Forbes LGA, with the 'Rest of NSW' used as a comparator area where relevant. The Rest of NSW is a geographic area defined by the ABS as being the State of New South Wales, with the Greater Sydney Greater Capital City Statistical Area removed. This enables comparison of the Forbes LGA with other regional areas of NSW. These study areas and their relationship with the site are shown in Figure 9.

The data and analysis in this chapter is generally based on 2021 Census data from the Australian Bureau of Statistics (ABS).

Figure 9: The site and study areas



Source: HillPDA, ABS (2022)

3.3 Local demographics

This section provides an overview of the existing social baseline in the study area.

3.3.1 Population

In 2021, more than 9,300 people lived in Forbes…

- Of these, 49.4% were male and 50.6% were female
- Over 13% of Forbes' population identified as Aboriginal and/or Torres Strait Islander.

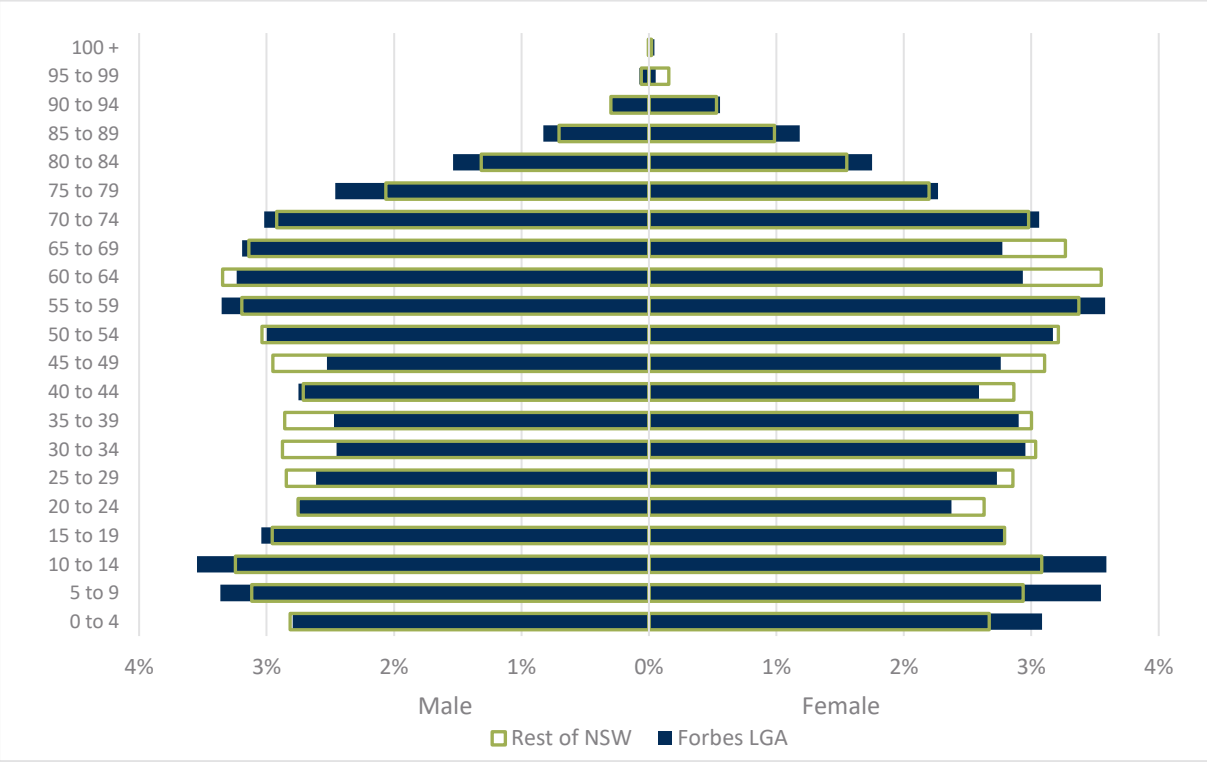
The age profile of Forbes is roughly similar to that of regional NSW as a whole…

- The median age of Forbes was 42 years, close to that of regional NSW (43 years)
- Compared to regional NSW, Forbes had a higher proportion of residents aged under 20, and a higher proportion of residents aged 70 or older.

At the 2021 Census the population of the Forbes LGA was 9,319 persons. A comparative age breakdown of the 2021 populations of Forbes LGA and the Rest of NSW is shown in Figure 10. Comparing the age structures, the population of Forbes LGA is generally similar to that of the Rest of NSW. Forbes LGA has a higher proportion of residents aged 19 years or under, and a slightly higher proportion of residents aged 70 years and over. However, proportionally fewer Forbes LGA residents were aged between 25 to 49 years.

The 2021 median age in the Forbes LGA reflects this, and was recorded as 42 years old, marginally younger than that recorded across of the Rest of NSW, which was 43 years.

Figure 10: Comparative age structure, Forbes (LGA) and Rest of NSW, 2021



Source: ABS (2022)

3.3.2 Aboriginal and Torres Strait Islander population

Forbes has a significant Aboriginal population…

- In 2021, over 13% of Forbes' population identified as Aboriginal and/or Torres Strait Islander (over 1,200 people), roughly double that of regional NSW as a whole (6.6%)
- This population was much younger than the rest of Forbes, with a median age nearly half that of Forbes as a whole (23 years).

As at the 2021 Census, 13.3 per cent of Forbes LGA's total population were Aboriginal and/or Torres Strait Islander (1,236 persons), significantly higher than the 6.6 per cent recorded across the Rest of NSW. The median age of Forbes LGA's Aboriginal and/or Torres Strait Islander population was just 23 years old, significantly younger than the overall median age recorded in the Forbes LGA, and equal to the median age of Aboriginal and/or Torres Strait Islander people across the Rest of NSW.

The vast majority of Aboriginal and/or Torres Strait Islander people in Forbes LGA reported that they spoke only English at home (97.2 per cent), whilst less than one per cent reported speaking an Australian Indigenous language at home.

An overview of available Census data (refer to Table 8) showed that Aboriginal and/or Torres Strait Islander people in Forbes LGA lived in slightly larger households compared to the LGA overall, as well as that they had somewhat lower median weekly personal and household incomes. Despite this, Aboriginal and/or Torres Strait Islander people in Forbes LGA were found to pay similar amounts in rent and mortgage repayments.

Table 8: Comparison of selected attributes, Bathurst (LGA) residents and ATSI Bathurst (LGA) residents, 2021 Census

Metric	Forbes LGA residents	Aboriginal and/or Torres Strait Islander Forbes LGA residents
Average household size	2.4	2.9
Median weekly personal income	$718	$640
Median weekly household income	$1,259	$1,257
Median weekly rent	$230	$225
Median monthly mortgage repayment	$1,283	$1,309

Source: ABS *QuickStats* (2022)

3.3.3 Diversity and specific needs

Compared to regional NSW as a whole…

- More Forbes residents were born in Australia
- Fewer households spoke a language other than English at home

Some Forbes residents may have housing needs arising from their health…

- Around 1/3 Forbes residents reported having one or more long term health conditions
- Around 6% of Forbes residents require assistance with their core day-to-day activities

3.3.3.1 Cultural diversity

In general, as at the 2021 Census, Forbes LGA was slightly less culturally diverse than the Rest of NSW as a whole. A higher proportion of Forbes LGA residents were born in Australia (86.6 per cent) than across the Rest of NSW, which recorded 81.3 per cent. Just 5.3 per cent of Forbes LGA residents reported that both their parents were born overseas, much lower than the 15.5 per cent recorded across the Rest of NSW.

The proportion of Forbes LGA households where a language other than English was spoken at home (3.1 per cent) was also lower than the 8.4 per cent recorded across the Rest of NSW.

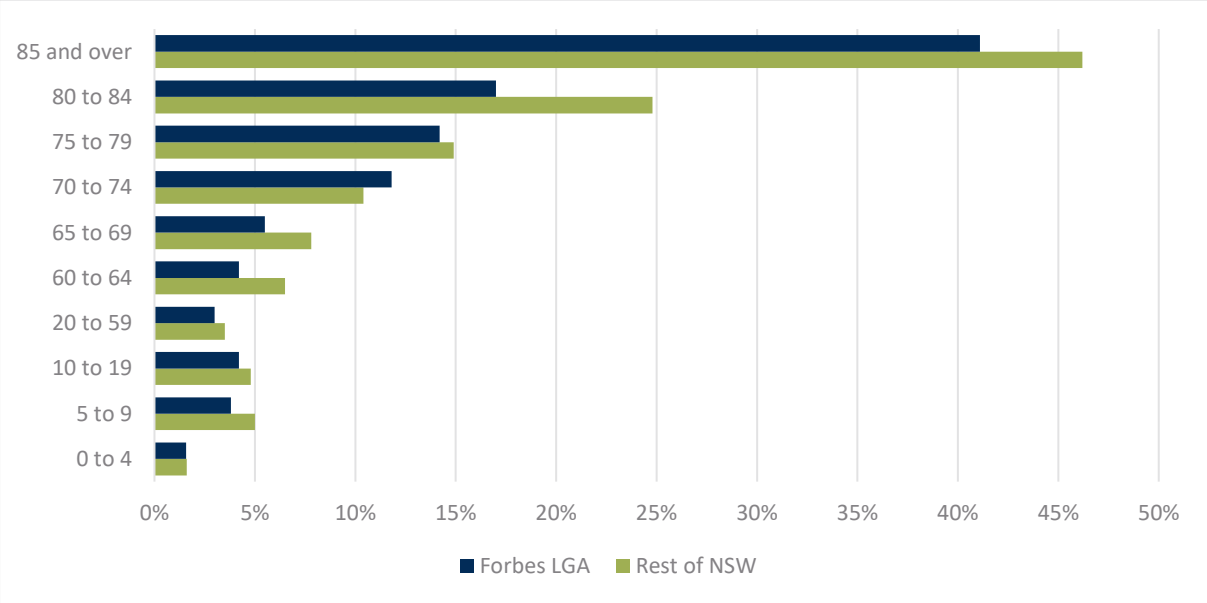
3.3.3.2 Health and disability

Overall, as at the 2021 Census, Forbes' population had a somewhat healthier population than the Rest of NSW, with fewer residents with disabilities or long term health conditions.

Fewer people in Forbes LGA needed help with their day-to-day activities due to a disability or health condition than across the Rest of NSW. In the Forbes LGA, this was around 6.1 per cent of the population, compared to around 6.8 per cent for the Rest of NSW (profile.id 2023). Around one third (34.9 per cent) of the Forbes population reported having one or more long term health conditions, lower than the 37 per cent across the Rest of NSW.

Figure 11 shows the proportion of people who require assistance with core activities by age group for Forbes and the Rest of NSW. For most age groups, a similar proportion was recorded across both areas, however, far fewer Forbes LGA residents aged over 80 years require assistance with core activities compared to the Rest of NSW. This may be indicative of older residents with higher care needs moving away from Forbes, to larger centres with more aged care facilities or services that meet their specific needs.

Figure 11: Proportion of residents requiring assistance with core needs (by age group), Forbes LGA and Rest of NSW (2021)



Source: ABS 2022, compiled by profile.id (2023)

3.3.4 Socioeconomic indicators

People in Forbes earn similar incomes to people in regional NSW, with cheaper housing…

- Forbes' median personal weekly income ($718) was close to the regional NSW median ($722), however, Forbes' median household income was almost $200 per week lower
- Median weekly rent and monthly mortgage repayments in Forbes were far lower than those across regional NSW.

Forbes has strong local employment and key anchor industries…

- As at March 2023, unemployment was just 1.9% in Forbes, lower than NSW (2.9%)
- Major employment industries in Forbes include agriculture, healthcare and social assistance, and education and training, with these industries employing over 40% of Forbes' workers.

Parts of Forbes are significantly disadvantaged…

- Most of Forbes' households are within areas ranked in the bottom third in terms of socio-economic disadvantage and advantage (compared to Australia as a whole)
- Many of the areas nearest to the site are ranked within the most disadvantaged ten per cent of areas across Australia.

3.3.4.1 Income and expenses

As at the 2021 Census, Forbes LGA residents appeared to face similar household costs to residents across the Rest of NSW. This can be seen in Table 9, as whilst Forbes LGA residents recorded somewhat lower household incomes, rent and mortgage costs were also lower.

Table 9: Median personal and household incomes and housing expenses

Metric	Forbes LGA residents	Rest of NSW residents
Median weekly personal income	$718	$722
Median weekly household income	$1,259	$1,434
Median weekly rent	$230	$330
Median monthly mortgage repayment	$1,283	$1,733

Source: ABS *QuickStats* (2022)

In addition to the above, for the 12 months preceding March 2023, the unemployment rate in Forbes LGA was 1.9 per cent (Jobs and Skills Australia, 2023). This compares favourably with the unemployment rate for the Rest of NSW for the same period, which was 2.9 per cent (ABS Labour Force Survey, 2023).

Table 10 shows the top five industries by percentage of employed persons for Forbes LGA and the Rest of NSW as at the 2021 Census. Whilst government employment – in the form of health care and education – is a key employer in Forbes as across the Rest of NSW, agriculture, forestry and fishing is the most significant employment industry overall across the LGA. Beyond these construction and retail trade are also significant employers in the Forbes LGA.

Table 10: Top five industries of employment, Forbes LGA and Rest of NSW (2021)

Industry of employment	Forbes LGA
Agriculture, Forestry and Fishing	17.6%
Health Care and Social Assistance	12.2%
Education and Training	10.8%
Retail Trade	9.4%
Construction	7.1%

Industry of employment	Rest of NSW
Health Care and Social Assistance	16.3%
Retail Trade	9.4%
Construction	9.4%
Education and Training	9.2%
Accommodation and Food Services	7.5%

Source: ABS *QuickStats* (2023)

In terms of how people travel to work, more than 70 per cent of employed people in Forbes LGA travelled in a car, as driver or passenger, on the day of the 2021 Census. This was more than five per cent higher than the rate recorded across the Rest of NSW (65.2 per cent). Very few people in Forbes used public transport to travel to work (less than one per cent), similar to the rate recorded across the Rest of NSW.

Around four per cent of people walked to work, whilst around 11 per cent worked from home. A smaller proportion of Rest of NSW residents walked to work (around three per cent), whilst more worked from home (around 16 per cent). Despite the effects of the COVID-19 pandemic on Census data across much of metropolitan Australia, Forbes' travel to work figures were broadly similar to those recorded at the 2016 Census.

3.3.4.2 Socio-Economic Indexes for Areas

The Socio-Economic Indexes for Areas (SEIFA) are rankings of relative socio-economic status (advantage and disadvantage) for different geographic areas, within each state and nationally. The indexes rank areas against others of the same geographic type (e.g. Local Government Area or Statistical Area Level 1) based on specific socio-economic metrics, selected based on the particular SEIFA index.

Relative socio-economic disadvantage

The Index of Relative Socio-economic Disadvantage (IRSD) examines factors including unemployment, proportion of lower income households, or lower education levels, to compare overall levels of disadvantage in areas.

Higher rankings on the IRSD can indicate:

- More households with lower incomes
- More residents without qualifications
- More residents in low skilled occupations or unemployed.

Lower rankings on the IRSD can indicate:

- Fewer households with lower incomes
- Fewer residents without qualifications
- Fewer residents in low skilled occupations or unemployed.

The IRSD ranking of SA1s near the site (in deciles) is shown in Figure 12.

Figure 12: SA1s by IRSD decile

Source: ABS (2023)

Relative socio-economic advantage and disadvantage

The Index of Relative Socio-economic Advantage and Disadvantage (IRSAD), in addition to the indicators of disadvantage above, examines factors like professional occupations, high income, higher education levels, larger houses to compare overall levels of advantage and disadvantage in areas.

Higher rankings on the IRSAD can indicate:

- More households with high incomes, or more people in skilled occupations
- Fewer households low incomes, or less people in unskilled occupations.

Lower rankings on the IRSAD can indicate:

- More households with lower incomes, or more people in unskilled occupations
- Fewer household with higher incomes, or fewer people in skilled occupations.

The IRSAD ranking of SA1s near the site (in deciles) is shown in Figure 13.

Figure 13: SA1s by IRSAD decile

Source: ABS (2023)

Overall, for both the IRSD and IRSAD, most of Forbes' SA1s ranked near or below the 30th percentile nationally, whilst the more urbanised SA1s in Forbes' north recorded very low rankings. Several of these areas, immediately south of the site, were ranked below the 10th percentile nationally, indicating the presence of significant disadvantage.

3.3.5 Households and dwellings

3.3.5.1 Household size and type

Most households in Forbes are small…

- Over two thirds of households house just one or two people
- Nearly 1/3 Forbes households consisted of just one person.

At the 2021 Census there were 3,563 households in Forbes LGA, with an average of 2.4 people per household. This shows a small increase in total number of households (by around 70) since the 2016 Census. The average people per household figure remained static at 2.4 over the period from 2011 to 2021, though NSW DPE's population projections suggest this will decrease to just below 2.3 persons per household by 2041.

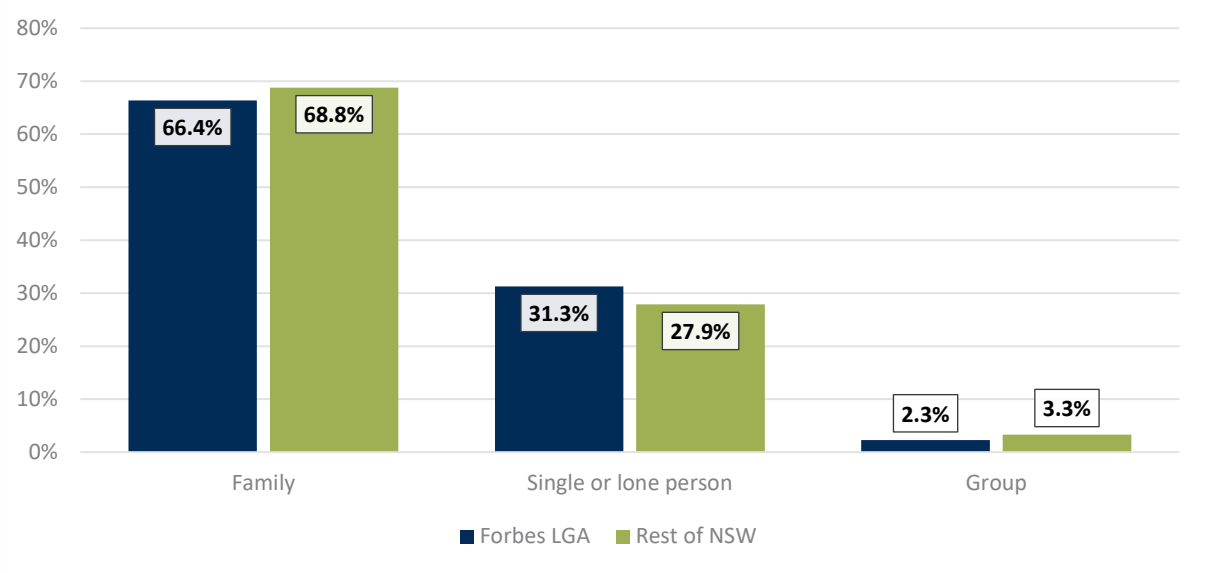
Figure 14 shows the number of persons usually present in dwellings, both in Forbes and across the Rest of NSW as at the 2021 Census. Compared to the Rest of NSW, a higher proportion of Forbes dwellings housed just one person, at nearly a third of all dwellings. Fewer Forbes LGA households consisted of three or four people compared to across the Rest of NSW, whilst a roughly similar proportion of two person and five or more person households were recorded.

Figure 14: Households by number of persons usually resident, Forbes LGA and Rest of NSW (2021)

Source: ABS *TableBuilder* (2023)

Compared to the Rest of NSW, a higher proportion of Forbes LGA households were single or lone person households, whilst family and group households made up a smaller proportion of the total. This is shown in Figure 15.

Figure 15: Occupied dwellings by household type, Forbes LGA and Rest of NSW (2021)



Source: ABS *QuickStats* (2023)

3.3.5.2 Dwelling diversity

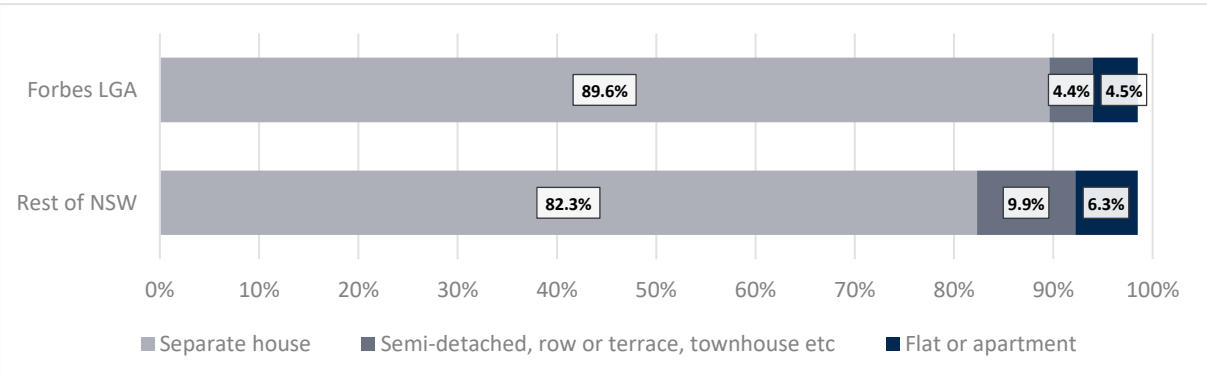
Despite its relatively small households, most dwellings in Forbes are big.

- Nearly 90% of dwellings in Forbes are separate houses
- Apartments and semi-detached dwellings make up less than 5% of Forbes dwellings each
- Only 20% of Forbes' dwellings had two or fewer bedrooms
- Many dwellings in Forbes have one or more 'spare' bedrooms.

As at the 2021 Census there were 4,365 dwellings in the Forbes LGA. This was similar to that recorded in 2016, when there were 4,370 dwellings. The vast majority of these dwellings were separate houses, as shown in Figure 16.

A greater share of Forbes' dwellings (almost 90 per cent) were separate houses compared to across the Rest of NSW (around 82 per cent). Correspondingly, fewer Forbes LGA dwellings were apartments or townhouses, with these two combined totalling around nine per cent of all dwellings (compared to around 16 per cent of all dwellings across the rest of NSW).

Figure 16: Dwellings by typology, Forbes LGA and Rest of NSW (2021)

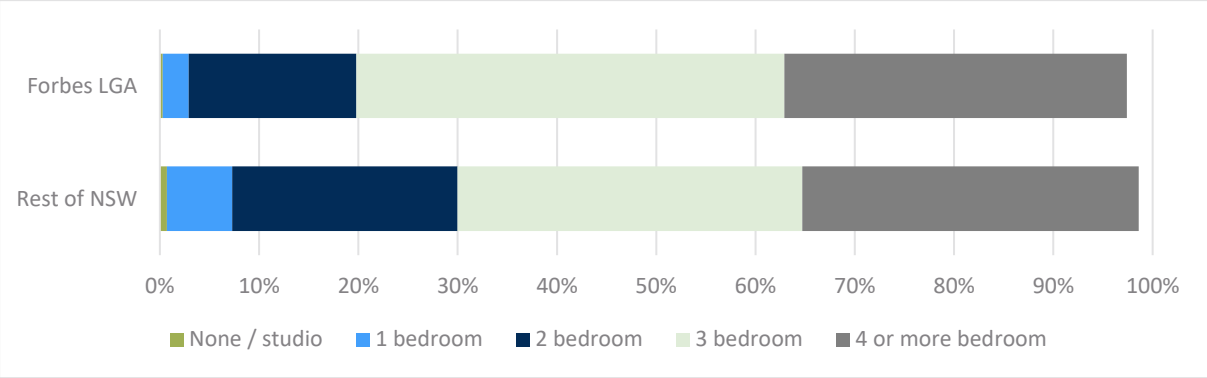


Source: ABS *QuickStats* (2022)

Further to the above, Figure 17 shows the proportion of dwellings in Forbes LGA and across the Rest of NSW, categorised by number of bedrooms. More than three quarters of Forbes LGA dwellings were three or more bedrooms, as at the 2021 Census, compared to less than 70 per cent of Rest of NSW dwellings.

Around 20 per cent of the Forbes LGA's dwellings had two or fewer bedrooms, compared to around 30 per cent across the Rest of NSW, reflecting a lack of dwelling diversity.

Figure 17: Dwellings by number of bedrooms, Forbes LGA and Rest of NSW (2021)



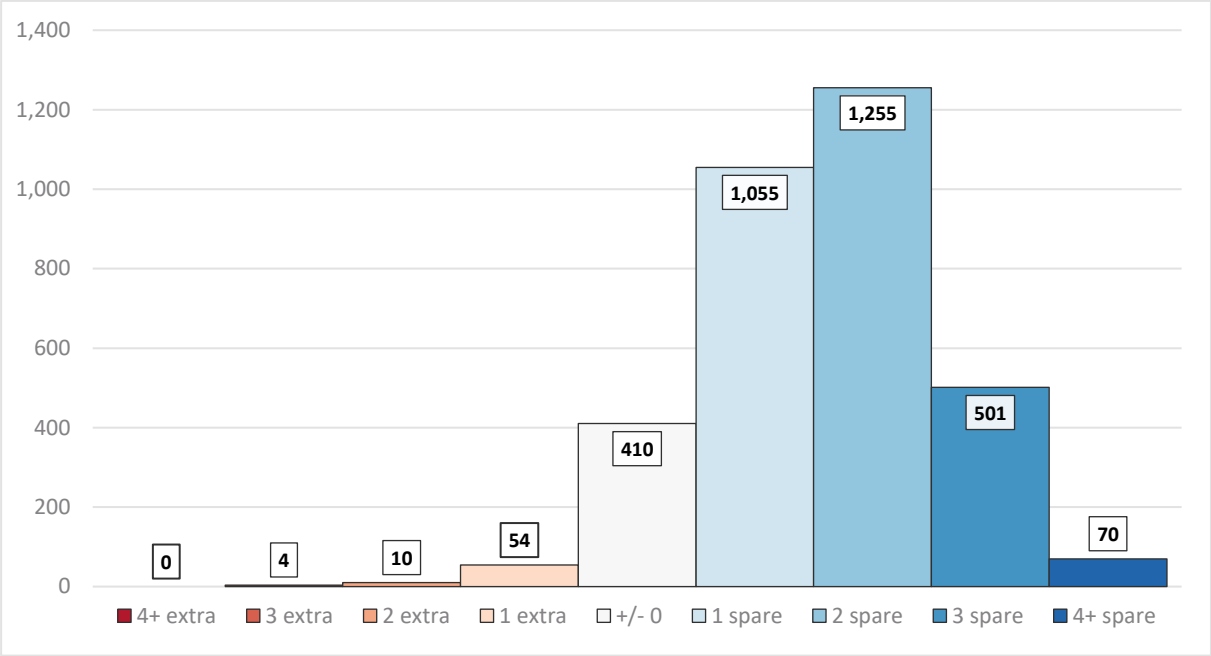
Source: ABS *QuickStats* (2022)

Figure 18 shows dwellings in Forbes LGA by the number of additional bedrooms required or spare. The ABS develops this metric based on a range of variables that indicate the number of separate bedrooms required in a dwelling, including relationships between household members, and age and sex differences.

This metric can generally indicate the level of dwelling suitability in an area. A large proportion of dwellings with an indicated need for additional bedrooms may indicate a housing affordability issue or a lack of well-located larger dwellings, whilst a large proportion of dwellings with spare bedrooms may be indicative of a lack of smaller dwellings or a large population of 'empty nesters.'

It is important to note that, as this metric is derived rather than self-reported, it is intended as a broad indication only. For example, a household with two spare bedrooms may have chosen that dwelling to use one 'spare' bedroom as a home office and a second as a guest room for adult children. Similarly, cultural differences or individual family expectations may lead to diverging views on whether a household requires an additional bedroom. Despite these caveats, the overwhelming majority of dwellings with one or more spare bedrooms in Forbes suggests that there is likely a degree of unmet demand for smaller dwellings.

Figure 18: Dwellings by number of additional bedrooms required or spare, Forbes LGA (2021)



Source: ABS *TableBuilder* (2023)

3.3.5.3 Housing market

Housing affordability in Forbes is somewhat better than across regional NSW…

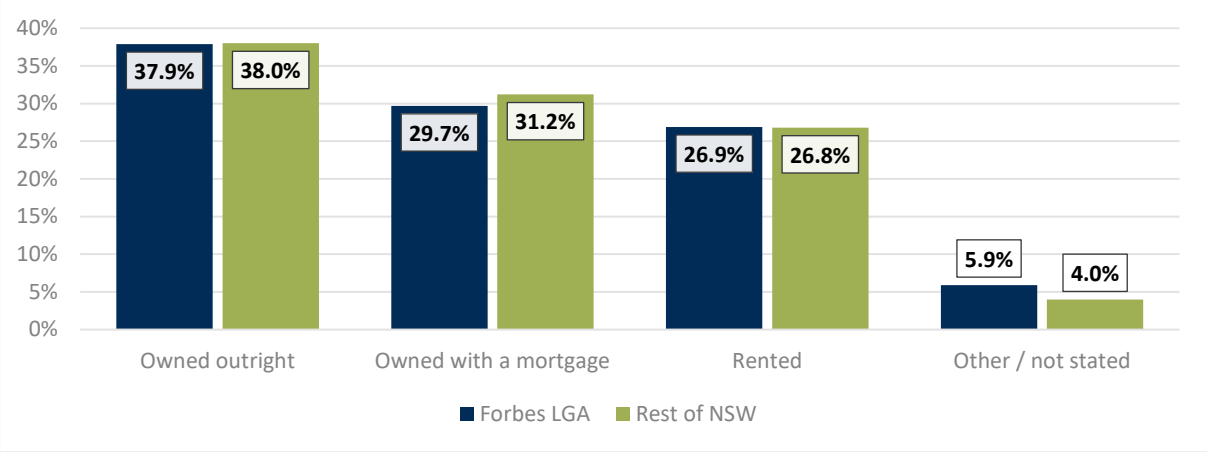
- Fewer Forbes households spend >30% of their household income on rent or mortgage payments
- Rent and mortgage payments in Forbes are generally in the lower two quartiles of payments across NSW as a whole.

…but Forbes' housing market is small and under pressure.

- Forbes has a small housing market with limited diversity, which is driving issues with housing affordability
- Rental vacancy rates are very low (0.7%), reflecting a tight rental housing market.

Figure 19 shows dwellings in Forbes LGA and the Rest of NSW as at the 2021 Census by their tenure type. Differences between the two areas were minimal overall, though notably fewer Forbes LGA households had mortgages compared to the Rest of NSW.

Figure 19: Dwellings by tenure type, Forbes LGA and Rest of NSW (2021)

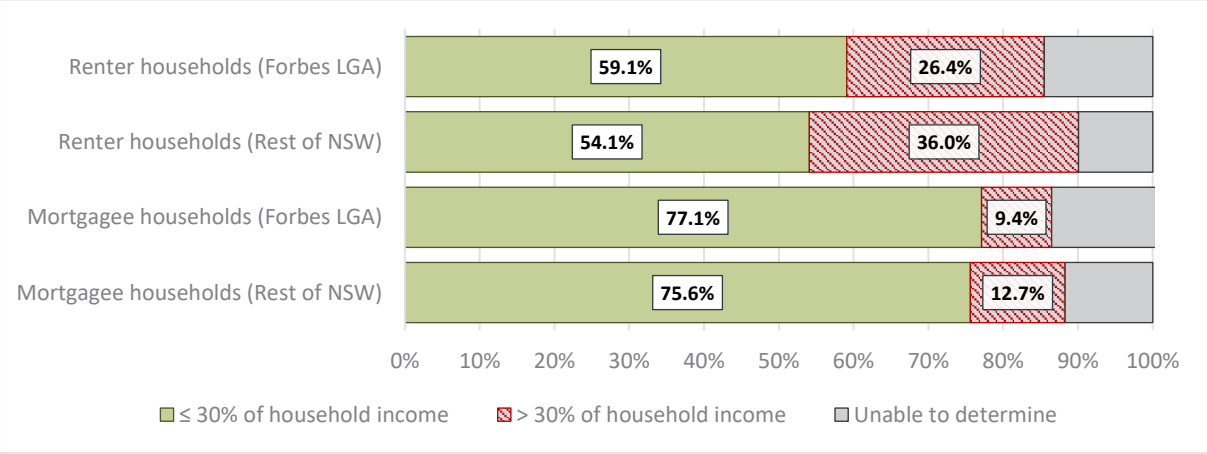


Source: ABS *QuickStats* (2022)

'Rent stress' and 'mortgage stress' are terms used to indicate where a household's expenditure on housing is likely to impact on their ability to afford other essentials such as groceries, bills, or transport. Typically, a household is considered to be experiencing rent stress when rental payments exceed 30 per cent of household income.

Figure 20 shows the proportion of renter households in the Forbes LGA and the Rest of NSW experiencing rent/mortgage stress as at the 2021 Census. Overall, a greater proportion of both renter and mortgagee households across the Rest of NSW were in rent/mortgage stress compared to Forbes LGA. In particular, a far greater proportion of NSW renter households were experiencing rental stress compared to Forbes renter households, at nearly 10 per cent more.

Figure 20: Rent and mortgage stress, Forbes LGA and Rest of NSW (2021)



Source: ABS *QuickStats* (2022)

Table 11 shows the weekly rental payment quartiles for NSW as at the 2021 Census. Weekly rental payments across NSW at each Census are distributed from lowest to highest and divided into four equal groups, or rental quartiles. This enables comparisons to be made between renter households in the Forbes LGA and the Rest of NSW.

Table 11: Rental payment quartile distribution, Forbes LGA and Rest of NSW (2021)

Rental quartiles	Quartile ranges (for NSW, rent per week)	Forbes LGA	Rest of NSW
Lowest group	$0 to $314	79.8%	43.0%
Medium lowest	$315 to $432	16.7%	30.9%
Medium highest	$433 to $562	2.3%	17.7%
Highest group	$563 and over	1.3%	8.4%

Source: ABS (2021), compiled by profile.id (2023)

Compared to the Rest of NSW, a far higher proportion of renter households in the Forbes LGA were in the lowest quartile for weekly rent payments. Nearly four in five renter households recorded weekly rental payments in the lowest quartile, close to double that recorded across the Rest of NSW as a whole.

Table 12 contains the same data as per the previous, but for monthly mortgage payment quartiles as at the 2021 Census.

Table 12: Mortgage repayment quartile distribution, Forbes LGA and Rest of NSW (2021)

Mortgage quartiles	Quartile ranges (for NSW, payment per month)	Forbes LGA	Rest of NSW
Lowest group	$0 to $1,381	58.0%	35.9%
Medium lowest	$1,382 to $2,123	27.3%	32.1%
Medium highest	$2,124 to $3,203	9.4%	20.6%
Highest group	$3,204 and over	5.3%	11.5%

Source: ABS (2021), compiled by profile.id (2023)

The results show that mortgage repayments in the Forbes LGA also differ significantly from those recorded across the Rest of NSW. At the 2021 Census, around 85 per cent of mortgagee households in the Forbes LGA were within the lowest and medium lowest quartile. That is, the vast majority mortgage repayments in Forbes were cheaper than half of all mortgages across the Rest of NSW.

Regardless of the above findings, the small size of the Forbes housing market and its limited diversity are driving affordability issues. Council has identified these as key matters to address in future housing supply, particularly with regard to young and ageing people, and rental housing.

A further contributing factor to housing affordability for renters is vacancy rates. Whilst a typical 'healthy' rental vacancy rate would be around two or three per cent, the vacancy rate in Forbes was just 0.7 per cent as at April 2023 (*Forbes 2871*, SQM Research, 2023). This matter has been raised by Council as a pressing issue.

3.4 Projections

This section contains projections for population and dwelling demand growth, derived from projections produced by the NSW Department of Planning and Environment.

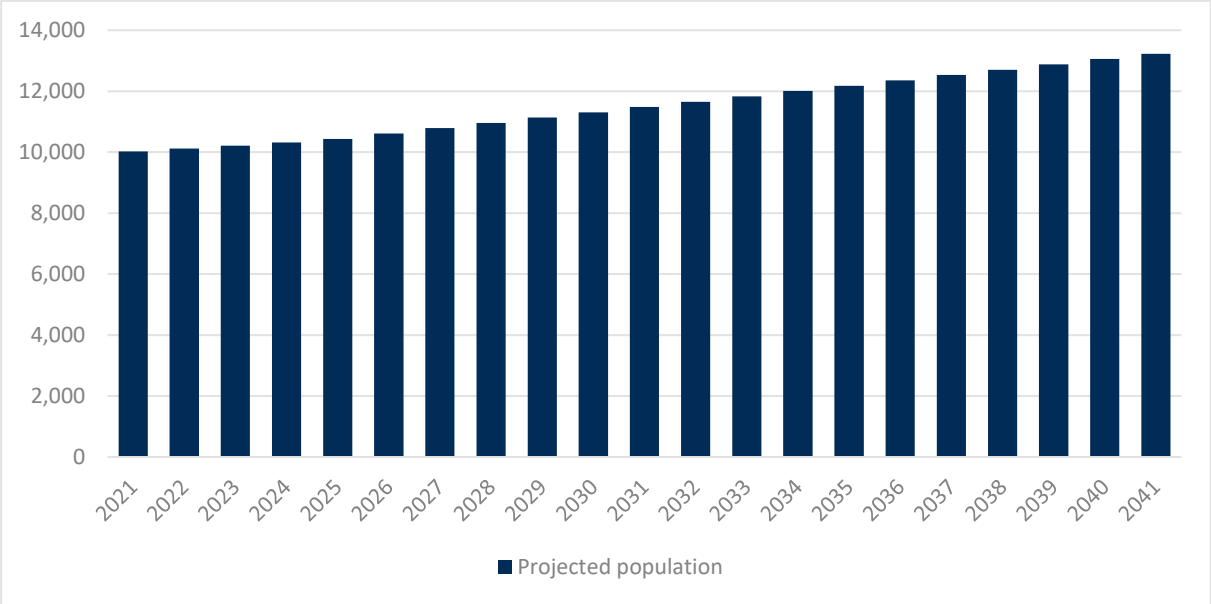
3.4.1 Population

Forbes is growing…

- An additional 3,900 people are projected to live in Forbes in 2041
- This includes around 800 additional people aged under 20 years old and around 1,000 additional people aged 65 years or older.

From the recorded population of around 9,300 in 2021, Forbes' population is anticipated to grow at a steady rate of 1.4 per cent per annum across NSW DPE's forecast period, reaching over 13,200 people by 2041. This would represent an additional 3,900 residents living in the Forbes LGA, as shown in Figure 21.

Figure 21: Projected population and annual growth rate, Forbes LGA (2021-2041)

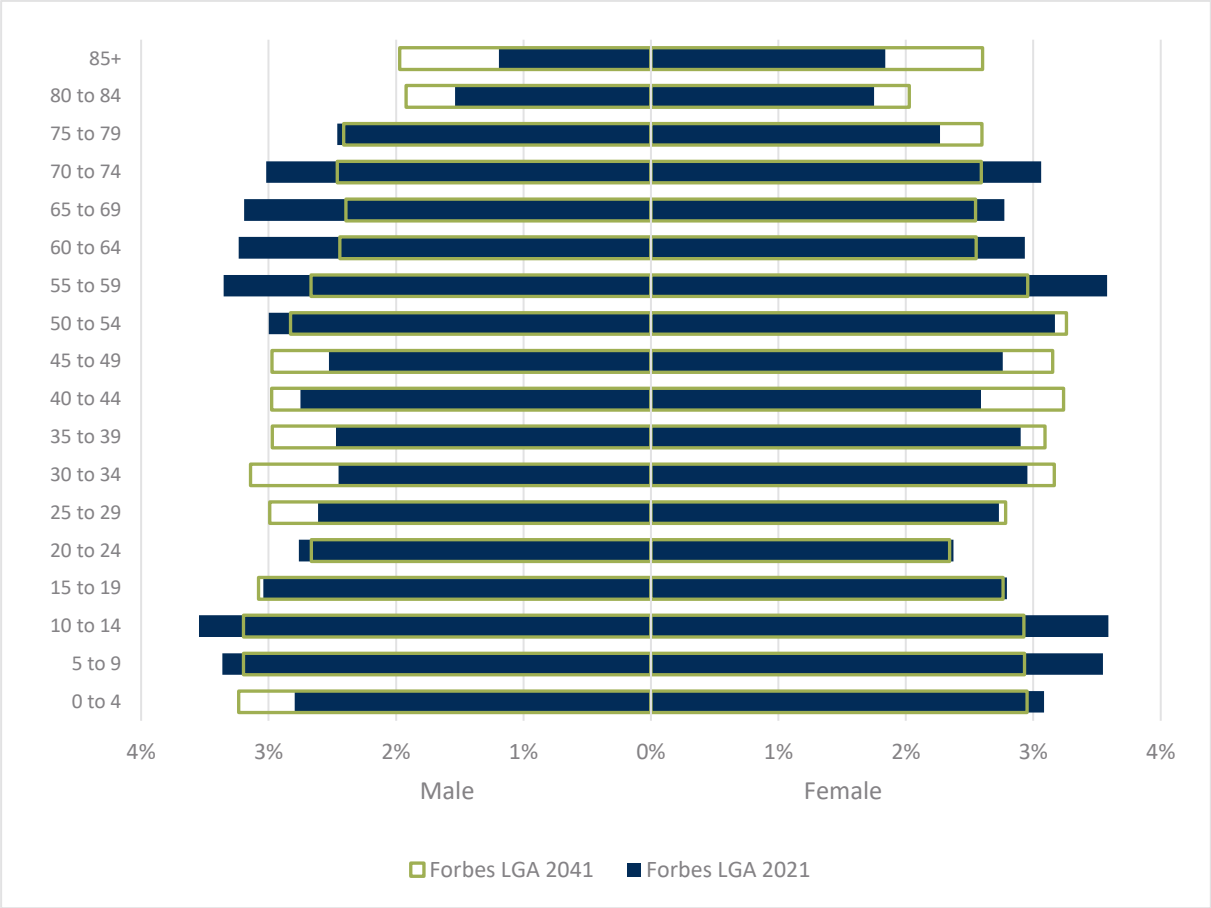


Source: NSW DPE (2023)

DPE's projections indicate that Forbes' population will become slightly younger, with the median age decreasing slightly from the 42 years recorded at the 2021 Census, to around 41.5 years by 2041. In numerical terms, the projections show growth in all age groups, however, a greater share of Forbes residents are projected to be aged between 30 and 49 years, and over 75 years, compared to at present. Meanwhile, the share of residents aged 55 to 74 is projected to decrease, as is the share of residents aged 4 to 14 years.

These findings are shown in Figure 22. Whilst the largest growth would be in younger and middle aged adults, it is notable that Forbes is projected to host around 800 more people aged under 20 years old, and around 1,000 more people aged 65 years or older by 2041.

Figure 22: Current and projected population age structure, Forbes LGA (2021-2041)



Source: NSW DPE (2023)

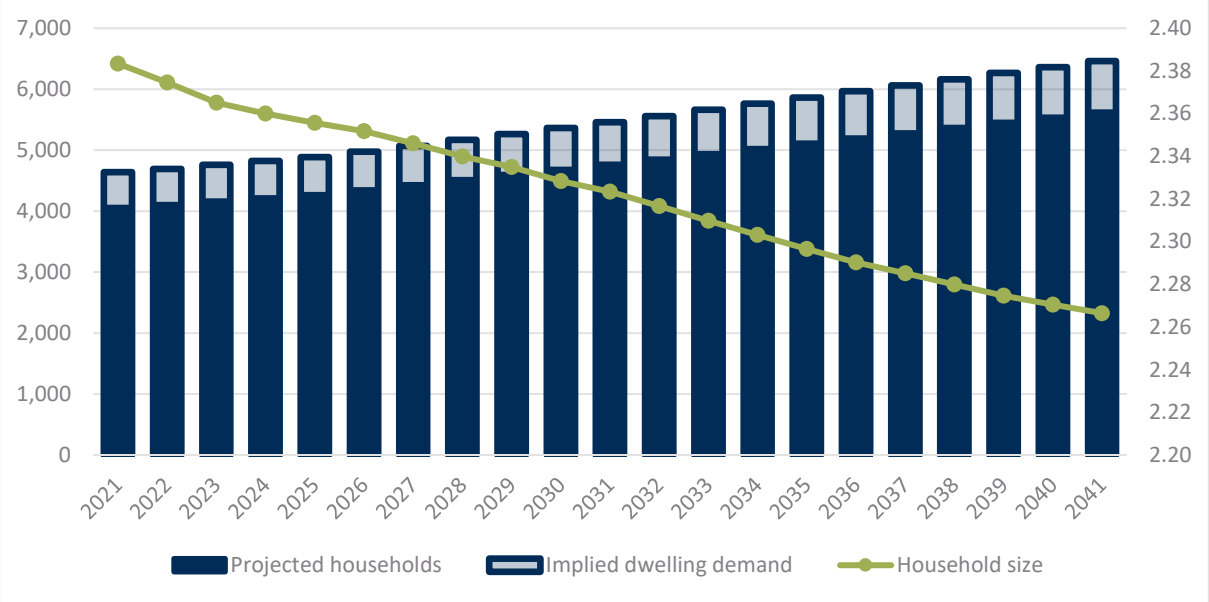
3.4.2 Households and dwellings

Forbes will need more places for people to live.

- Projections indicate Forbes will need between 1,800 and 2,100 additional dwellings by 2041 (approximately)
- This equates to between 90 and 105 additional dwellings per annum (approximately)
- These dwellings will need to be diverse, suitable for (among others) around 530 lone person households, 430 couple households, and 370 couple with children households
- Forbes is not currently approving enough housing to meet this projected demand.

The projected growth outlined above will result in additional demand for housing through the formation of new households. To inform strategic planning for this housing demand, NSW DPE undertakes analysis of population and household size projections and dwelling occupancy estimates, as shown in Figure 23. The derived 'dwelling demand' projection is based on the projected number of households and estimated dwelling occupancy rates.

Figure 23: Projected number of households, household size, and implied dwelling demand, Forbes LGA (2021-2041)



Source: NSW DPE (2023)

This dwelling demand figure exceeds the projected households figure by a rate that is equivalent to DPE's expectations of dwelling occupancy rates. To accommodate anticipated dwelling occupancy rates, a surplus of housing is required. With that in mind, dwelling demand is projected to grow to around 6,450 by 2041.

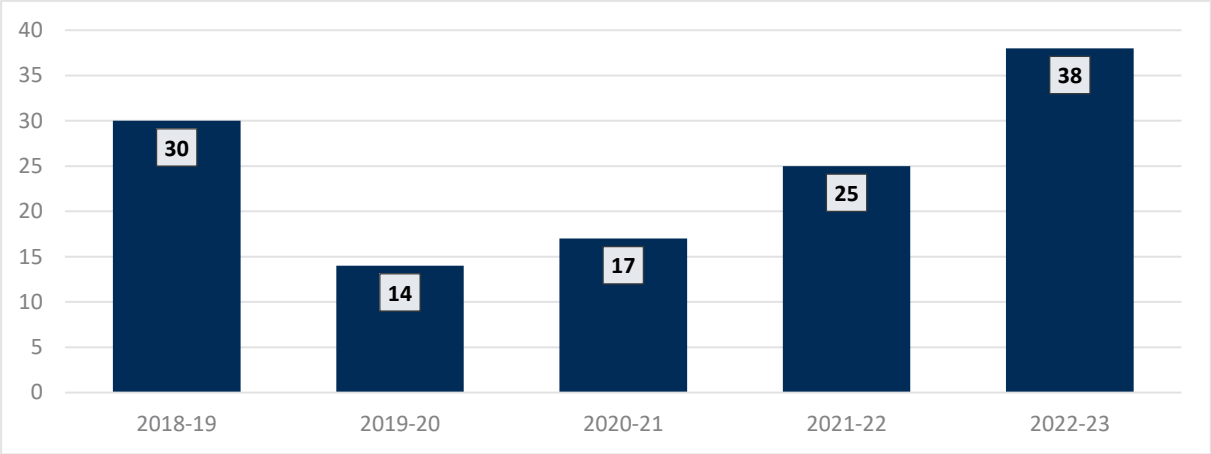
The LHS includes an assessment of the number of additional dwellings required to meet this demand, sourced from DPE's projections. These projections were finalised prior to the 2021 Census results being released, however, and therefore the 2021 figure is an estimate based on earlier data and projections. The number of dwellings recorded in Forbes at the 2021 Census was in fact lower than DPE's estimate, thereby resulting in a larger number of dwellings required by 2041. These are shown in the table below.

Scenario	Total dwellings (2021)	Dwelling demand (2041)	Additional dwellings required 2021-41	
			Total	Per annum (average)
LHS (DPE)	4,640	6,459	+1,819	+91 p/a
Census and DPE	4,365	6,459	+2,094	+105 p/a

Source: HillPDA, ABS (2022); Forbes Shire Council (2023); NSW DPE (2023)

To meet this projected demand, Forbes requires between 90 to 105 additional dwellings per year over the period 2021-2041. As per Figure 24, the number of dwellings approved across the Forbes LGA has not met this mark in the most recent five years.

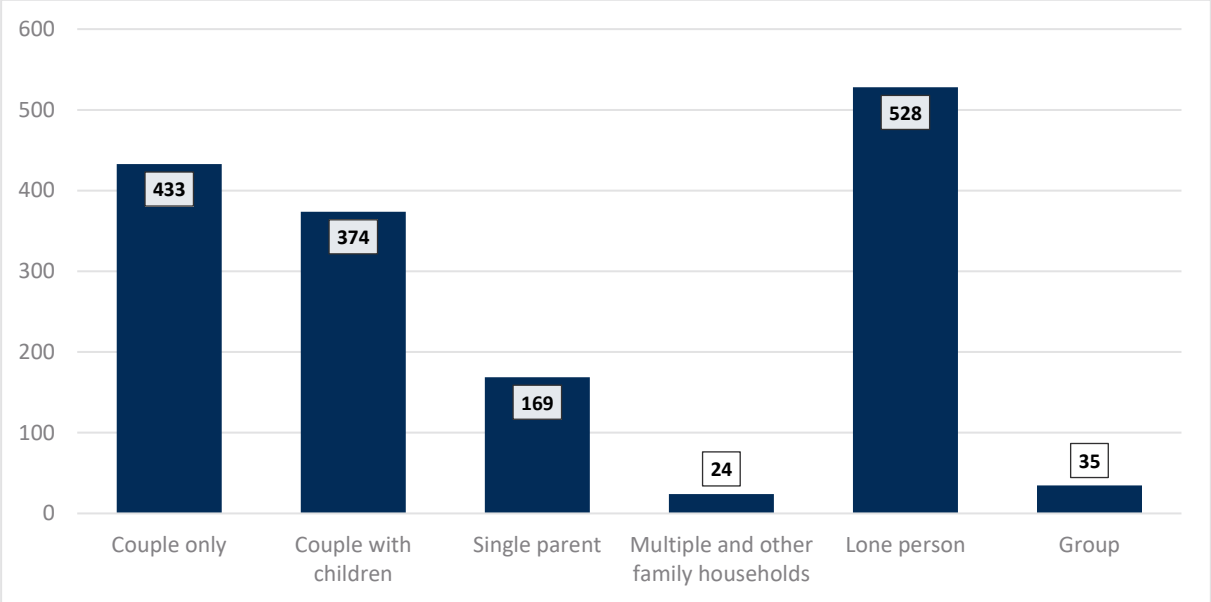
Figure 24: Residential dwelling approvals by financial year, Forbes LGA (2018-19 to 2022-23)



Source: ABS *Building Approvals* (2018-2023)

As noted in the Forbes LHS, there are few smaller lots or dwellings in Forbes' existing housing market. This was confirmed in discussions the proponent held with Council, as well as HillPDA's engagement with a Council representative, wherein delivering more diverse housing in Forbes was seen as a critical outcome of any major developments in the future. This is supported by the projections, as shown in Figure 25, which shows the number of additional households (compared to in 2021) by type projected in Forbes by 2041.

Figure 25: Projected additional households by type, Forbes LGA (2021-2041)

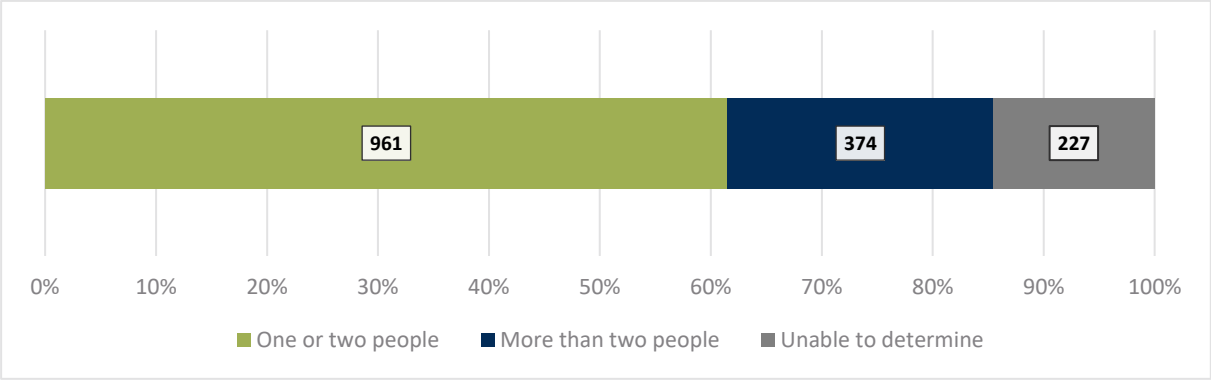


Source: NSW DPE (2023)

Whilst DPE does not provide additional household projections by number of persons present, we can glean some indication by the household type categories. Couple only and lone person households must contain one or two people, whilst couple with children households must contain more than two people.

As shown in Figure 26, over 60 per cent of additional households in Forbes are projected to consist of just one or two people. This would be in addition to the existing number of smaller households that may prefer a smaller dwelling (as noted in section 3.3.5).

Figure 26: Projected additional households by type (implied), Forbes LGA (2021-41)



Source: HillPDA, NSW DPE (2023)

3.5 Social infrastructure audit

This section identifies the social infrastructure facilities near the site across four categories: recreation and open space, libraries and community facilities, child care and education, and healthcare.

3.5.1 Recreation and open space

Recreation and open space areas are important to communities. Through enabling exercise and sports, these areas offer physical and mental health benefits to individuals, whilst they also support community cohesion and the development of social bonds. Recreation and open space areas can also provide environmental benefits including plant and animal habitat, water management, and mitigating the urban heat island effect.

This section considers the current provision of recreation and open space in the Forbes area (as it relates to the site).

Figure 27: Open space and recreation areas in Forbes and surrounds

Source: HillPDA, DPE *Points of Interest* layer (2023), Forbes Shire Council *ROSS* (2021)

Table 13: District and town level open space and recreation facilities in Forbes

ID	Name	Description	Classification	Area	Distance
1	Botanic Gardens Reserve	Large multi-sports facility to the south of Forbes that hosts athletics, soccer, touch football, and junior cricket. Includes: • 4 full-sized soccer fields • 4 smaller-sized soccer fields • 5 x cricket ovals (synthetic wicket) • 1 x canteen.	**Town** *Sports park*	14 ha	>5km
2	Ron Flannery Park / Forbes Tennis Club	Tennis/multi-purpose facility located to the south of Forbes, with a clubhouse and small playground area. • 7 x tennis courts (synthetic) • 3 x tennis / small-sided hockey fields (synthetic) • 1 x clubhouse and storage facility • 1 x playground.	**Town** *Sports park* (tennis/hockey) **Local** *Recreation park* (playground)	0.75 ha	>2km
3	Gaggin Oval / Halpin Flat	Multi-sports park west of the Forbes centre, includes: • 2 x cricket ovals (synthetic wicket) • 5 x croquet lawns and croquet clubhouse • 1 x softball field.	**District** *Sports park*	5.5 ha	>2km
4	Gum Swamp Reserve	Large nature reserve with woodland and swamp, southwest of Forbes. Serves as travelling stock route and nature observation area, popular with birdwatchers.	**Town** *Natural area*	87 ha	>5km
5	Nelson Park	District recreation park with new playground, shading, seating and picnic tables, public toilets, and 'street library'. Includes: • 1 x playground • 2 x tennis courts (hard court) • 1 x cricket / general use oval • 1 x cricket net • 1 x rebound wall.	**District** *Recreation park*	0.85 ha	1.6km
6	South Circle / Grinsted Oval	Multi-sport facility near Forbes town centre, including: • 2 x cricket ovals / rugby union fields (turf wicket) • 4 x cricket nets • 1 x clubhouse.	**Town** *Sports park*	5 ha	>2km
7	Spooner Oval / Hughie Wilson Oval	Multi-sport facility southwest of Forbes town centre, including: • 1 x cricket (synthetic wicket) oval • 1 x rugby league field • 1 x clubhouse / amenities facility • 1 x small playground.	**Town** *Sports park*	7 ha	>2km
8	Stephan Field	Multi-sport facility in the Forbes centre, with recently updated amenities and seating / picnic table areas. Includes: • 9 x netball courts • 2 x basketball/netball court • 4 x junior cricket ovals • 1 x amenities / canteen building • 1 x playground / 'ninja park'.	**Town** *Sports park* (tennis/hockey) **Town** *Recreation park* (skate/play)	3.3 ha 0.2 ha	>2km
9	Victoria Park	Victoria Park is located in the Forbes town centre and serves as a key space for events. It functions as a town square and includes formal gardens, a war memorial and band rotunda, and public toilets.	**Town** *Civic park*	0.73 ha	>2km

Source: Forbes Shire Council *ROSS* (2021)

The figure and table above indicate that residents of Forbes and its surrounds have access to a good quantity and variety of recreation and open space areas, serving a range of functions. These are generally centred around the Forbes centre or to its south, with a large proportion within the Lake Forbes precinct, adjacent to the waterway.

Most of the identified recreation and open space assets in Forbes, however, are located in near the centre or to the south of Forbes – in other words, far from the site. Further, a large proportion of the recreation and open space areas available to Forbes locals are adjacent to Lake Forbes, and are susceptible to flooding.

As indicated in Figure 27, there are no open space or recreation areas within 500 metres of the site, however, there are three areas located within two kilometres of the site:

- Nelson Park, a district level recreation park, located around 1.6 kilometres south of the site (refer item 5 in the above figure and table).
- Mabel Green Park, a 4,000 square metre local recreation park located around 750 metres southeast of the site. Includes a small playground suited to young children, but is generally limited in embellishment.
- Jenny Murphy Park, an 8,700 square metre local recreation park located around 550 metres south of the site. Includes a general purpose informal field, shelters, some play equipment and a rock climbing area.

Further to the above, other major recreation facilities in Forbes include the Council-owned Forbes Golf Course and the Forbes Olympic Pool, both around 2.5 kilometres southeast of the site.

3.5.2 Libraries and community facilities

Libraries, community centres, and other public and semi-public places serve important functions in providing facilities and amenity to residents, generally at a low cost or free of charge. They can also serve as a 'third space' between work or school and home, enabling residents to relax and socialise in the community. These facilities can be especially important in smaller or regional communities and can enable clubs, societies and other social groups to form and grow.

Figure 28: Libraries and community facilities in Forbes

Source: HillPDA, DPE *Points of Interest* layer (2023)

Table 14: Libraries and community facilities in Forbes

ID	Name	Description	Distance
1	Forbes Library	Operated as part of the Central West Libraries Network. Provides computer, printing, and internet access, as well as auxiliary services for residents with impairments or access requirements (such as a home delivery service).	2.9km
2	Forbes Town Hall and Concourse	Theatre-style venue overlooking Victoria Park, with capacity for up to 300 people, with curtained stage area, lighting and sound system. Concourse area suitable for use as foyer, with bathroom and kitchen facilities. Available for hire.	2.8km
3	Forbes Youth and Community Centre	Newly-renovated facility with large hall area, kitchen and barbecue facilities, outdoor area, and sandpit and cubby house. Available for hire.	2.4km
4	Wiradjuri Dreaming Centre	Education and community hub in a landscaped park-like setting, with various art and cultural interpretation pieces. Hosts meetings, workshops, and cultural events to promote Wiradjuri culture.	2.8km

Source: Forbes Shire Council *ROSS* (2021)

Forbes' town centre hosts a selection of important community facilities, as shown in the above figure and table.

In addition to the above formalised facilities, numerous other facilities serve community roles, either part-time or occasionally, as is often the case in regional communities. In Forbes, these informal community facilities include sports clubs and their facilities, such as the tennis or golf club, or the Forbes Sports and Recreation Club (or bowls club). These facilities may have spaces that are available for hire or hosting community events, in addition to the community role played by the club itself.

Further, several community organisations operate in Forbes including the Forbes and District Historical Museum, Forbes Country Women's Association, and the Forbes and District Lions Club. Two 'men's sheds' are also operational in Forbes; the Forbes Community Men's Shed, and Forbes Wiradjuri Men's Shed. These and other various serve a range of community needs and interests in Forbes.

3.5.3 Childcare and education

Social planners and Council are reliant on the NSW Department of Education (and any relevant private school providers) to provide input into planning for education facilities and provision, especially early in the master planning process. Nonetheless, it is important to consider the level of education provision available near a site due to the importance of education access.

Figure 29: Education and childcare facilities in Forbes

Source: HillPDA, DPE *Points of Interest* layer (2023)

Table 15: Education and childcare facilities in Forbes

ID	Name	Type	Sector	Enrolments / places	Distance
1	Goodstart Early Learning Forbes	Long day care	N/A	75	1.5km
2	Bright Beginnings Early Learning Centre	Long day care	N/A	70	1.5km
3	Forbes Learning Ladder	Long day care	N/A	90	900m
4	Forbes Community OSHC	Outside school hours care	N/A	36	1km
5	Forbes Preschool Kindergarten	Preschool	N/A	100	1.7km
6	Forbes Public School	Primary school	Public	309[a]	3km
7	Forbes North Public School	Primary school	Public	236[a]	900m
8	Forbes High School	High school	Public	308[a]	900m
9	St Laurence's Parish School	Primary school	Catholic	299[b]	2.1km
10	Red Bend Catholic College	High school	Catholic	802[b]	>5km
11	TAFE NSW – Forbes	Tertiary / vocational	Public	N/A	3km

Source: ACECQA (2023), ACARA (2019; 2022), NSW Department of Education (2023)
a: 2023 enrolment b: 2022 enrolment

As per the above figure and table, Forbes has a fair range of childcare and education facilities available locally. There are a handful of childcare facilities, consisting of three day care facilities, in addition to one outside school hours care facility and one preschool facility. Three primary schools – two public and one Catholic – are available in Forbes, alongside one public and one Catholic high school. Vocational education is available via TAFE NSW, which operates a campus in central Forbes. None of these facilities are located within 500 metres of the site, however, several are located within two kilometres.

The nearest childcare facility to the site is Forbes Learning Ladder, a long day care centre, located around 900 metres south of the site. Two further long day care centres are located around 1.5 kilometres from the site. In total, these facilities provide a maximum of 235 long day care places. Current capacity levels are unknown, however, engagement with Council representatives suggested that childcare availability in Forbes is an issue at present.

The nearest public primary school is Forbes North Public School, located around 900 metres south of the site, whilst Forbes Public School is around three kilometres south of the site. NSW Government data for 2023 indicates that these schools have FTE enrolment totalling approximately 545 students. Over the period 2019 to 2023, Forbes North Public School's enrolment has reduced by roughly 25 FTE, whilst Forbes Public School's enrolment has increased by around 40 FTE.

The nearest high school is Forbes High School, around 900 metres south of the site. Enrolment at Forbes High School was around 300 FTE in 2023; down by around 70 FTE compared to 2019.

3.5.4 Healthcare

Healthcare access can be limited in rural or regional areas, contributing to poorer health and social outcomes compared to metropolitan areas. This can also interact with other issues such as isolation, socioeconomic disadvantage, dangerous professions, and exposure to climate or natural disaster risk. Additionally, people in regional areas may have to travel further to access healthcare, especially for conditions or injuries requiring specialist treatment. As such, access to healthcare can be an important part of social infrastructure, and housing that is poorly located in relation to healthcare facilities can become an equity issue.

Figure 30: Healthcare facilities in Forbes

Source: HillPDA, DPE *Points of* Interest layer (2023)

Table 16: Healthcare facilities in Forbes

ID	Name	Type	Billing	Distance
1	Forbes Public Hospital	Hospital	N/A	4km
2	Yoorana Gunya Family Healing Centre	General Practice *(specialist Aboriginal service)*	Bulk billing	4km
3	Forbes Medical Centre	General Practice	Mixed	4km

ID	Name	Type	Billing	Distance
4	Forbes Medicine & Mind	General Practice *(inc. NSW Health Pathology)*	Mixed	2.7km
5	Life Pharmacy Forbes	Chemist	N/A	2.9km
6	Flannery's Pharmacy	Chemist	N/A	2.6km

Source: DPE *Points of* Interest layer (2023)

There are no healthcare facilities within two kilometres of the site. However, there is a generally adequate cohort of providers in the Forbes centre, and south of Forbes, with two general practitioners, two chemists, and a public hospital. Further to this, a specialist Aboriginal general practitioner is available south of Forbes. The nearest general practitioner is located around 2.7 kilometres south of the site boundary, in the Forbes CBD.

In addition to the above, the Forbes Outreach Centre (central Forbes) and Forbes Community Health Centre Social Work Service (south of Forbes), provide the local community with access to various important social work and counselling services.

COMMUNITY NEEDS ANALYSIS

4.0 COMMUNITY NEEDS ASSESSMENT

This chapter provides an overview of how the proposal impacts and addresses community needs identified in the earlier sections of this report.

4.1 Population at the site

In order to evaluate how the proposal effects community needs, it is first necessary to understand the on-site population at full development.

Based on the current draft masterplan provided by the proponent, we can estimate a total population at the site using the household size and the implied occupancy rate from NSW DPE's population projections. Once fully developed, we anticipate the 745 lots proposed to house a resident population of around 1,560 people.

This is shown in Table 17.

Table 17: Population projection at the site

Metric	Definition	Figure
Yield	Number of lots proposed in the draft masterplan.	745
Occupancy rate	Number of households per dwelling, as per NSW DPE projections.	0.88
Household size	Number of persons per household, as per NSW DPE projections.	2.38
Total population		**1,560**

Source: HillPDA, DPE (2023)

By combining the above figure and the observed 2021 Census age structure of the Forbes LGA, we can generate a projected breakdown of the population at the site by age group. This has been broken into 'service age groups', age categories developed by demographers .id to reflect typical 'life stages' and support the consideration of demand for different types of services (.id, 2023). This is shown in Table 18.

Table 18: Estimated population at the site by service age group

Service age group (age range in years)	Forbes LGA (2021, % of total)	Population at the site
Babies and pre-schoolers (0 – 4)	5.9%	92
Primary schoolers (5 – 11)	9.7%	151
Secondary schoolers (12 – 17)	8.0%	125
Tertiary education and independence (18 – 24)	7.2%	112
Young workforce (25 – 34)	10.8%	168
Parents and homebuilders (35 – 49)	16.1%	250
Older workers and pre-retirees (50 – 59)	13.1%	204
Empty nesters and retirees (60 – 69)	12.2%	190
Seniors (70 – 84)	14.1%	221
Elderly aged (85+)	3.0%	48
Total	**100.0%**	**1,560**

Source: HillPDA, ABS (2022)

4.2 Housing need

Forbes is anticipated to grow and change over the coming years, with a large proportion of future housing demand projected to arise from smaller households of one or two people. Housing affordability and a lack of housing diversity are also rising concerns in Forbes.

As indicated in section 3.4.2, Forbes requires between 90 to 105 additional dwellings per year over the period 2021-2041 to meet its projected housing demand. In the past five years, the number of approved dwellings per year across the LGA has not come near this level.

As part of its role in enabling the Forbes community to prosper and thrive, Council wishes to ensure that future housing in the Shire addresses these and other identified issues. The proposal will seek to balance these competing concerns.

Table 19 provides an overview of identified housing needs in the community, as surmised from the evidence base in this SEIA and the Forbes LHS.

Table 19: Key housing needs in Forbes

Group	Need
 **Seniors**	• Dwellings that are adaptable or universally accessible • Smaller dwellings / lots that provide a single level home with a small, manageable amount of open space • Access to amenities and transport to essential services (particularly health and social opportunities).
 **One and two person households**	• More diverse dwelling types at a range of price points • Smaller dwellings in high amenity locations.
 **Families with children**	• Standard 'traditional' size separate lots with private open space • A diversity of lot sizes to meet the needs of different families and incomes • A mix of price points and dwelling sizes to improve & support housing diversity and affordability.
 **Lower income households**	• More diverse dwelling types at lower price points • Affordable rental housing • Smaller dwellings close to key services such as schools.

4.3 Social infrastructure

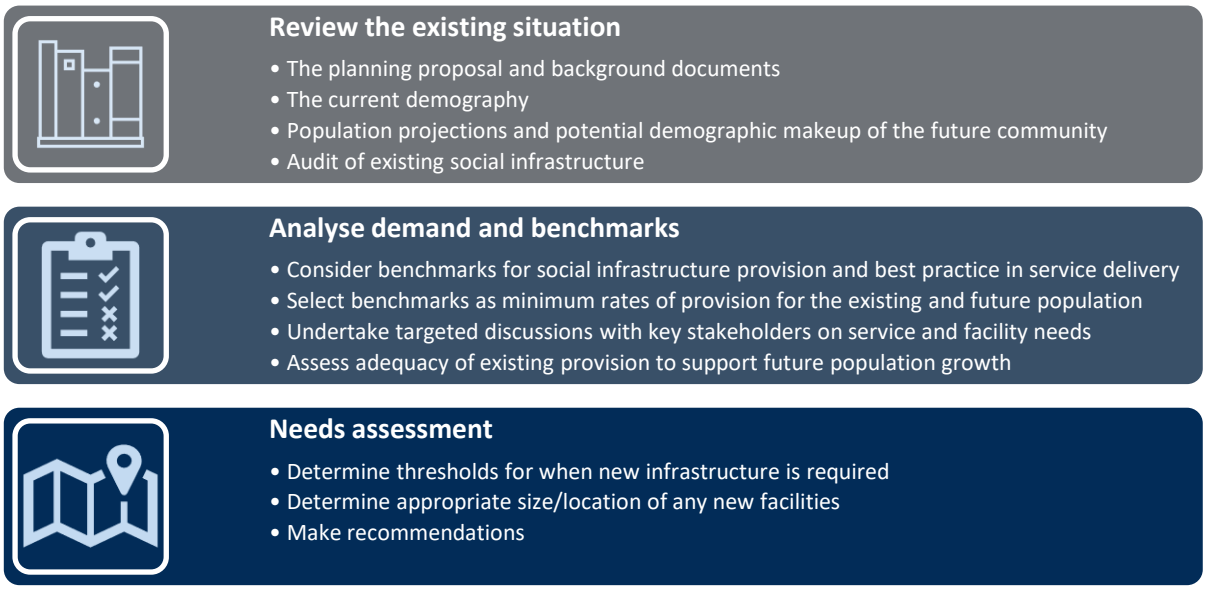
Social infrastructure should meet the needs of a current community and be responsive enough to efficiently address the needs of the future community. To ensure that social infrastructure continues to be responsive, it is important to understand its changing demography and future makeup of a community.

This section revisits the findings of the social infrastructure audit (refer to 3.5) and considers these in relation to the findings regarding the potential future population and infrastructure provision at the site. This work can help assist Council to determine how it can effectively and efficiently deliver infrastructure, and support the development of a proposal for the site that is responsive to the needs of the existing and future Forbes community.

In the following sections, the findings of the evidence base are considered through an interdisciplinary social science lens, in combination with GIS analysis and best-practice benchmarking to assess social infrastructure provision. We provide an assessment of the base case, and an assessment that assumes full development of the proposal as per the indicative masterplan.

The approach is outlined in Figure 31.

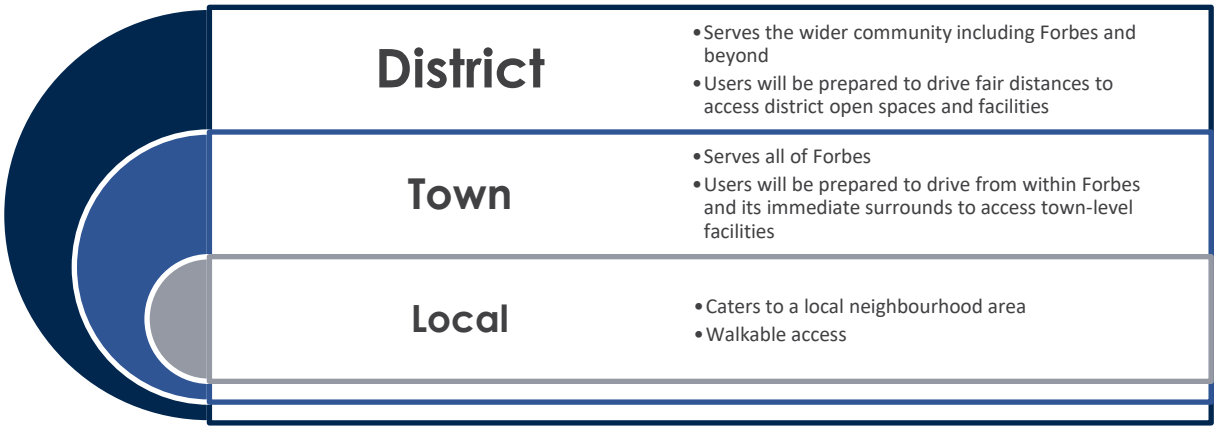
Figure 31: Social infrastructure benchmarking approach



Social infrastructure, like any form of public infrastructure, is designed with a finite capacity and intended to service a particular catchment. To that end, social infrastructure can be classified using a hierarchy of service provision as described below in Figure 32.

Whilst this hierarchy is intended to apply to open space and recreation areas and facilities, the general concept can be applied to other types of social infrastructure. An assessment of healthcare provision has not been undertaken in this section due to a lack of applicable benchmarks or provision rates.

Figure 32: Open space and recreation hierarchy



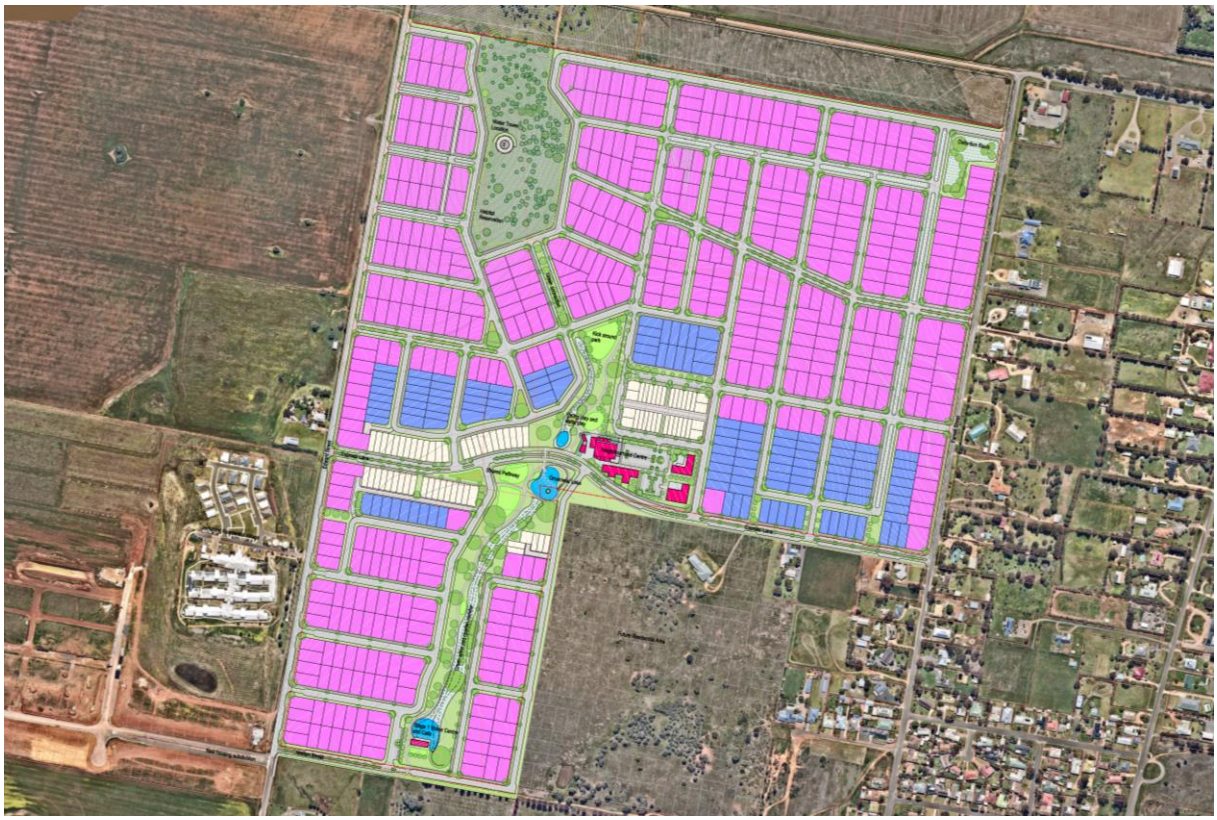
Source: Forbes Shire Council *ROSS* (2021).

Forbes' open space hierarchy also includes specialised and civic categories. Specialised facilities or areas are those suitable for only a specific use, whilst civic facilities or areas are generally informal urban spaces that may provide occasional public use opportunities (such as hosting ceremonies or events), but do not generally contribute to open space or recreation provision.

4.3.1 Provision within the site

The indicative masterplan (as shown in Figure 33) shows provision of a range of social infrastructure elements would be delivered at the site, assuming full development.

Figure 33: Indicative masterplan



Source: Allera

According to the indicative masterplan, the proposal would result in the provision of a range of social infrastructure at the site, including:

- A 'green spine' open space corridor traversing the site in a north-south direction
- A total of 5.6 hectares of open space, including:
  - A 'kick around park'
  - A play space and water play area for young children
  - Ornamental water features
- A total of 4.4 hectares of natural open space
- Shared pathway network
- Space for a child care centre.

4.3.2 Recreation and open space

Benchmarking for recreation and open space facilities and areas has been undertaken per the benchmarks established in the ROSS, as well as being informed by various other guidelines and experience.

Indicative benchmarking for recreation and open space is provided in Table 20.

Table 20: Recreation and open space facilities assessment

Type	Benchmark	Existing	Base case			Base case and proposal		
			Parameter	Need	Assessment	Parameter	Need	Assessment
Playgrounds	1:2,000 people[a] **OR** 1 within 500m / 5 minute walk [b]	5 x play grounds **OR** 0 within 500m / 5 minute walk	9,319	4.7	**Met**	10,879	5.4	**Met**
Local open space	0.5-1.5ha within 500m / 5 minute walk[b]	0ha	n/a	0.5-1.5ha	**Not met**	n/a	0.5-1.5ha	**Met**
Town open space	2-5ha within 2km / 5 minute drive[b]	0ha	n/a	2-5ha	**Not met**	n/a	2-5ha	**Not met**
District open space	5-10ha within a reasonable drive[b]	6.4ha	n/a	0-3.6ha	**Met**	n/a	0-3.6ha	**Met**
Desired standards of service (overall LGA-wide quantitative measure) [b]								
Recreation open space	2.5ha:1,000 people[b]	16.4ha	9,319	23.3ha	**Not met**	10,879	27.2ha	**Not met**
Sporting open space	1.5ha:1,000 people[b]	32.2ha	9,319	14.0ha	**Met**	10,879	16.3ha	**Met**

a: Parks and Leisure Australia WA (2020); b: Forbes Shire Council *ROSS* (2021)

Base case

Overall, under the base case and with the full development of the proposal, the overall level of provision across Forbes is very good. There are a range of sporting facilities that are well embellished and that provide significant quantity of space. All identified open space facilities or areas, however, are located beyond 500 metres from the site.

Accordingly, under the base case, only the overall provision of playgrounds, district open space, and sporting open space are met across the LGA. It is noted, however, that a quantity of town open space sufficient to meet the benchmark is located just beyond the benchmark travel time/distance.

Base case and proposal

With the proposal, however, the existing provision would be supplemented by around ten hectares of open space, including a playground and water play area, and an informal sporting open space area, local open space, and natural open space.

Under this scenario, whilst the overall assessment in the table above does not change significantly, the outcome would be much improved. The playground benchmark would be met, and the aforementioned town open space benchmark would remain unmet within the travel time/distance parameters, but generally well-supplied. Further, whilst the LGA-wide recreation open space standard of service would continue to be unmet, the ten hectares within the site would reduce the shortfall to less than one hectare across the LGA.

Other considerations

Beyond the existing and proposed provision, it is noted that the masterplan for Council's Goldridge Estate indicates that the site would also have access to a large amenity park area with a playground. This would be located within walking distance of much of the site.

In addition to this, as per the FOSS, Council is in the process of upgrading several of its key open space and recreation assets. Though these would remain separated from the site by some distance, draft masterplans for several parks indicate upcoming improvements to embellishment and sporting facilities that would vastly improve the quality of these areas.

Assuming implementation of the proposed works by Council across its parks, sporting areas, and provision of new facilities in the Goldridge Estate, the minor shortfalls identified in open space and recreation at the site would be negligible.

4.3.3 Libraries and community facilities

Benchmarking for libraries and community facilities has been undertaken per the benchmarks established in the *Growth Centres Development Code* (2006) and the City of Parramatta's *Community Infrastructure Strategy* (2020), and informed by various other guidelines and experience.

Indicative benchmarking for libraries and community facilities is provided in Table 21.

Table 21: Libraries and community facilities assessment

Type	Benchmark	Existing	Base case			Base case and proposal		
			Parameter	Need	Assessment	Parameter	Need	Assessment
Youth centre	1:20,000 residents[a]	1 x youth centre	9,319	0.5	**Met**	10,879	0.5	**Met**
Local community centre	1:6,000 residents[a]	1 x community centre	9,319	1.6	**Not met**	10,879	1.8	**Not met**
Branch library	1:33,000 residents[ab]	1 x library	9,319	0.3	**Met**	10,879	0.3	**Met**
Performing arts / cultural centre	1:30,000 residents[a]	1 x town hall 1 x Aboriginal cultural centre	9,319	0.3	**Met**	10,879	0.4	**Met**

a: *Growth Centres Development Code* (2006); b: NSW State Library (2021)

Base case

The above assessment indicates that under the base case, Forbes residents generally have adequate or better access to libraries and community facilities. For local community centres, however, an unmet need is apparent in the base case scenario. This is exacerbated by locational factors, as the Forbes Community Centre is located in central Forbes, some distance from many residents and the site.

It is noted that other facilities such as sports clubs or informal areas in the Forbes LGA provide a supplemental community centre functionality, however, this is unlikely to sufficiently address the unmet demand as a whole, particularly in the long term. With projected growth to 2041, this shortfall would continue to grow.

Base case and proposal

Assuming full development at the site, the above assessment indicates that the proposal is unlikely to generate significant additional demand. The assessment shows that additional demand for a youth centre, a library, and a performing arts/cultural centre would be minimal under each scenario, and effectively serviced by the existing provision.

The assessment does indicate that the existing unmet demand for a community centre would be exacerbated, however. It is therefore likely that a new community facility serving Forbes' northern areas may be required in the medium to long term future. It is noted that Council is aware of this matter and is considering options to address it.

As such, consideration could be given to whether the proposal could incorporate land or floorspace to enable a future local community centre or other multi-purpose facility, to be determined in collaboration with Council. Dependent on the outcome of this, the proposal may alleviate the unmet demand for a local community centre.

Finally, though the overall level of provision is acceptable, it is noted that none of the identified libraries or community facilities are located near the site, consistent with the assessment of Forbes' northern areas being poorly served by social infrastructure. To manage this, the design of the proposal should ensure that access to key social infrastructure facilities to the south is prioritised, in terms of active transport corridors, road layout, and urban structure. These appear to have been considered as part of the overall masterplan design.

Other considerations

Beyond the existing and proposed provision, it is noted that the masterplan for Council's Goldridge Estate indicates that a community centre would be established there, providing a much improved level of access to residents and the site and ensuring that the indicated need for an additional community centre is met.

4.3.4 Childcare and education

School benchmarking has been undertaken with regard to recent benchmarks established in the *Central Precinct Renewal Program - Social Infrastructure and Health Impact Assessment* (2022) by Transport for NSW, which HillPDA understands has been informed by more recent consultation with the Department of Education on school infrastructure design. Child care needs have been benchmarked using the City of Parramatta's *Community Infrastructure Strategy* (2020).

Indicative benchmarking for early childhood (e.g. long day care), as well as primary and secondary school needs has been undertaken below in Table 22.

Table 22: Childcare and education assessment

Type	Benchmark	Existing	Base case			Base case and proposal		
			Parameter	Need	Assessment	Parameter	Need	Assessment
Long day care centre	1 place: 2.48 children aged 0-4[c]	235 places (3 x LDC centres)	548	221	**Met**	640	258	**Met**
Public primary school	1:500 students aged 5-11[e]	2 x public primary schools	901	1.8	**Met**	1,052	2.1	**Met**
Public high school	1:1,200 students aged 12-17[d]	1 x public high school	748	0.6	**Met**	873	0.7	**Met**

c: City of Parramatta (2020); d: Approved maximum places; e: TfNSW (2022); f: 2023 enrolment (FTE)

Base case

Under the base case scenario, there is an adequate level of long day care places in Forbes. However, this assessment has not considered current availability, which may be lower than the number of approved places. In discussion with HillPDA, Council has indicated that there is an existing shortfall of childcare facilities in Forbes.

In terms of education, under the base case there is adequate supply of both public primary schools and high schools in Forbes. Further, these are well-located, relatively close to the site.

Base case and proposal

With the population arising at the proposal (assuming full development), the assessed need for long day care would exceed the current number of places.

However, the proposed neighbourhood centre provides space for a child care facility (indicative). As per section 6.4.1, we estimate that the centre would provide 65 additional long day care places, increasing the total places to around 300. This would be sufficient for additional need to be met.

Education needs would continue to be met by the existing provision under full development of the proposal.

Other considerations

It is noted that Forbes also hosts private schools, which would likely be used to some degree by future residents at the site. This would reduce any pressure on existing public services that may arise.

Additionally, whilst not contributing to the base case or base case with the proposal, the masterplan for the nearby Goldridge development indicates a childcare centre located near the site. Should this be delivered in future, provision would be further improved.

ECONOMIC ANALYSIS

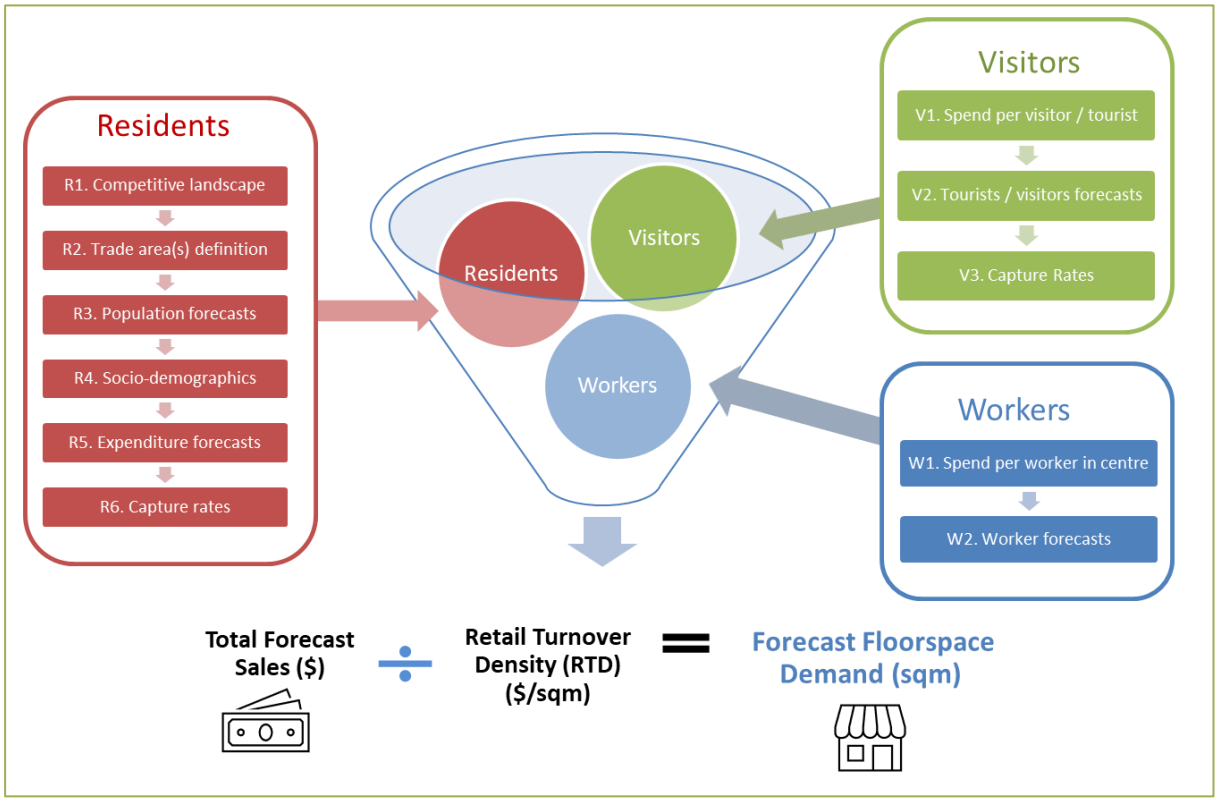
5.0 RETAIL DEMAND ASSESSMENT

This chapter provides an assessment of the amount of the amount of retail space that could be accommodated on the site based on future demand largely derived from population growth.

5.1 Demand methodology

The process of forecasting total potential retail demand is shown in Figure 34.

Figure 34: Methodology to forecast retail demand



Source: HillPDA

As illustrated above, there are three key sources of demand for retail floor space being:

- Residents in the locality
- Workers in the centre and
- Visitors and tourists.

For the site, we anticipate that residents will be the main source of expenditure for a retail centre on site, with low numbers of workers and tourists expected. As such, we have limited the source of demand to residents in the locality, whilst allowing for a small proportion of additional expenditure to be derived from other sources.

To forecast potential retail demand for the site, we developed a trade area, based on factors such as the location of competing centres, travel times, urban settlement patterns, and other criteria. It is essential to have an understanding of competing centres, their location relative to the site and their respective retail offers. This is provided in section 5.2.

We then utilised our proprietary expenditure models (which takes into account socio-demographics of the catchment, real growth in expenditure, population growth, potential capture rates and industry standard retail

turnover densities) to forecast the quantum of retail floorspace that could be accommodated on the site. The results are detailed in sections 5.3 to 5.4.

5.2 Retail centres

The key retail centres that would compete with and influence the trade area and capture rates of a retail centre on site are described as follows:

- There are two regional centres[1] in the Central West Region – Dubbo and Orange.
  - Dubbo, located an hour and forty minutes north of the site by road, has a very extensive trade area that covers the northern half of the Central West and extends north-west to Bourke. It also extends southwards to Forbes as travel times along the Newell Highway make it as equally attractive as Orange. Dubbo has more than 150,000 square metres of retail space and is anchored by a Myer department store, two discount department stores and several supermarkets. Dubbo also has an extensive range of restaurants and other personal services as well as an extensive range of bulky goods retailing and commercial services.
  - Orange, located an hour and thirty minutes east of the site by road, has an extensive trade area encompassing the southern half of the Central West and extends west to Lachlan and Bland Shires, and south to Weddin and Cowra. This regional centre provides a substantial retail offer (exceeding 100,000 square metres) featuring major national anchors like Kmart and Big W discount department stores, along with numerous national bulky goods retailers. Retail floor space in Orange is primarily concentrates in two areas: the town centre on Summer Street, which includes a 7,200 square metres Big W, Coles, Woolworths, and Aldi; and the Homemakers Centre on Bathurst Road and Lone Pine Avenue, (approximately 2 km east of the city centre) which is anchored by Bunnings, Autobarn, Spotlight, Early Setter and a Harvey Norman.
- Parkes, located around 30 kilometres or 25 minutes north of the site by road, Parkes which encompasses Parkes Central and Orange Grove Plaza offers around 35,000 square metres and includes anchor tenants such as Big W, Woolworths, Coles, Aldi as well as a variety of speciality stores, cafes and restaurants.
- Forbes Town Centre, located around four kilometres south of the site, the Forbes Town Centre provides the greatest level of competition given its proximity and comparative offer. The town centre is bounded by the railway line to the north, Forbes Lake to the east and south and a large belt of open space to the west which includes Stephen Fields Park, Goggin Park, Halpins Flat and the public swimming pool. The retail core is centred on Lachlan Street between Cross Street and Browne Street and also on Rankin Street between Cross Street and Grenfell Street. The centre provides around 21,000 square metres of retail floorspace, including a small format Kmart discount department store (former Target Country), 4,250 square metres of supermarket space (a 2,637 square metres Woolworth supermarket and independent grocer, Bernardi's Marketplace). Outside the retail core the town centre has mixed uses including dwelling houses, commercial buildings, dwellings used for commercial purposes and home occupations, churches, community uses, light industrial and automotive industries.
- Future retail developments: A review of development applications sourced from Cordell indicates that only small-scale retail businesses have been proposed. Some of these businesses offer different types of retail offerings, such as highway service stations. Should these retail spaces progress as planned, they are not expected to present substantial competition to the proposed retail centre on the site.

[1] Regional Centres: generally having more than 80,000sqm of retail floor space and anchored by a national department store (Myer or David Jones) and at least one discount department store (Big W, Kmart and/or Target). They also include entertainment uses such as a multi-screen cinema, ten-pin bowling or the like. Regional centres have an extensive trade area covering five or more local government areas with a population of at least 150,000 people. Examples include Wollongong, Tamworth, Dubbo, Orange and Wagga Wagga.

5.3 Residential expenditure

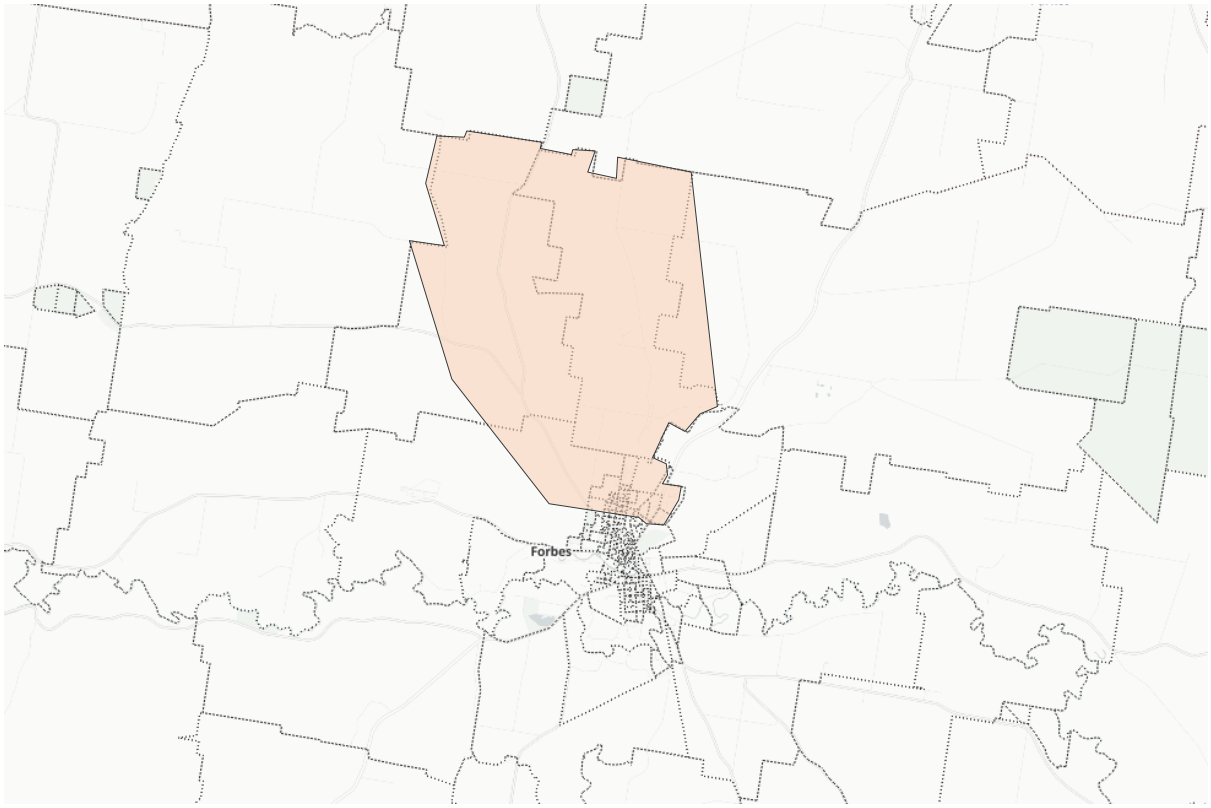
Current and forecast expenditure captured from surrounding residents is quantified by identifying the trade area(s), the current and future population in the trade area(s), the expenditure levels of trade area residents and the likely percentage of capture.

5.3.1 Trade area(s)

With consideration given to the surrounding retail centres, retail hierarchy, accessibility, travel times, urban settlement patterns and other criteria the proposed retail centre likely to serve as a neighbourhood centre is expected to service a main trade area (MTA) which extends south to Patterson Street and ten kilometres north of the site.

The MTA is shown in Figure 35.

Figure 35: Main trade area of the site



5.3.2 Population growth

Based on the 2021 Census data, the MTA accommodated around 1,800 persons. NSW DPE projects that the broader Forbes LGA will accommodate an additional 3,200 persons from 2021 to 2041, growing at an annual rate of 1.4 per cent. A substantial amount of land flagged for future residential development (over 60 hectares) is within the MTA. It should also be noted that these projections do not account for the proposed residential uses on the site which may result in higher than anticipated population projections.

For the purpose of this assessment, two scenarios have been considered:

- Lower growth: assumes full development of the site and half of the vacant and/or underutilised residential lots in the trade area by 2041 are developed at a density of 10 dwellings per hectare.[2]
- Higher growth: assumes full development of the site and all the vacant and/or underutilised residential lots in the trade area are redeveloped by 2041 at a density of 10 dwellings per hectare.[3]

Based on the above assumption the MTA population is projected to increase to over 4,000 persons by 2041 under the lower growth scenario and almost 4,700 persons under the higher growth scenario as shown in the table immediately below.

Table 23: MTA population projections

Trade area	2022	2026	2031	2036	2041
Lower growth	1,874	2,202	2,695	3,298	4,035
Higher growth	1,888	2,286	2,904	3,688	4,685

Source: ABS Census of Population and Housing: Mesh Block Counts.

5.3.3 Household expenditure

Compared to non-metro averages, MTA residents have slightly lower spend levels, with the average per capital spend on retail goods and services at around $14,736 ($2022) per person per annum which is one per cent below the non-metro average ($14,832).[4]

As shown in the table immediately below, retail expenditure generated by MTA residents is forecast to increase from $27.6 million in 2022 to $68.9 million in 2041 under the lower growth scenario and to $80.0 million under the higher growth scenario.

[2] Allows for residential vacancy at a rate of 11% which aligns with the LGA average
[3] Allows for residential vacancy at a rate of 11% which aligns with the LGA average
[4] ABS retail sales data. Expenditure includes selected personal services such as optical dispensing, hair and beauty and clothing alterations but excludes financial, travel, real estate, medical and other commercial services and online spend.

Table 24: Total retail expenditure in the trade area from 2022-2041 ($ millions)[5]*

Scenario / retail category	2022	2026	2031	2036	2041
Lower growth scenario					
Supermarkets and grocery stores	9.6	11.8	15.2	19.5	25.1
Specialised food stores	2.4	2.9	3.7	4.7	6.0
Bulky goods stores	4.5	5.4	6.8	8.7	11.0
Department stores	1.4	1.6	1.9	2.2	2.7
Apparel stores	2.4	2.9	3.7	4.6	5.8
Other non-food stores	3.9	4.7	6.0	7.6	9.6
Restaurants and fast food services	2.5	3.0	3.9	5.1	6.5
Personal services	0.9	1.1	1.4	1.8	2.3
Total	**27.6**	**33.5**	**42.6**	**54.1**	**68.9**
Higher growth					
Supermarkets and grocery stores	9.7	12.2	16.3	21.8	29.1
Specialised food stores	2.4	3.0	4.0	5.2	6.9
Bulky goods stores	4.5	5.6	7.4	9.7	12.7
Department stores	1.4	1.6	2.0	2.5	3.1
Apparel stores	2.4	3.0	3.9	5.2	6.8
Other non-food stores	3.9	4.9	6.4	8.5	11.1
Restaurants and fast food services	2.5	3.2	4.2	5.7	7.6
Personal services	0.9	1.2	1.5	2.0	2.6
Total	**27.8**	**34.7**	**45.9**	**60.6**	**80.0**

Source: ABS retail sales data

* Allows 0.8% per annum real growth in spend per capita in line with the long term historic trend since 1986.

** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.

*** Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling

**** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

5.3.4 Capture of household expenditure

The previous analysis identified the total volume of retail expenditure in the trade area. However, it is important to note that not all of this expenditure would be captured by retailers in the proposed development. Reasons for this include:

- **Proximity to competing centres**: The presence of nearby retail centres offering a broader and more varied range of shopping and grocery options may divert some expenditure away from the proposed development.
- **Brand preferences:** Residents who have a preference for particular supermarket brand other than that provided on site.
- **Leisure and discretionary shopping:** Residents leaving the locality to, predominantly, undertake leisure and discretionary shopping (in department stores, apparel stores and bulky goods stores in destinations such as Dubbo, Orange, Parkes etc). This can result in them also doing their supermarket and grocery shopping in these locations also.
- **Workplace spending:** Working residents spending a portion of retail expenditure close to their place of work (approximately 15-25 per cent).
- **Temporary absences:** Expenditure from residents who are on holidays/business trips or are away for other reasons for any extended period.

To account for these potential leakages we have assumed the capture rates shown in Table 25 across both scenarios.

[5] In 2022 dollars

Table 25: Assumed MTA capture rates

Retail store type	Capture rate (2022)
Supermarkets and grocery stores	55.0%
Specialised food stores	55.0%
Bulky goods stores	-
Department stores	-
Apparel stores	-
Other non-food stores	10.0%
Restaurants and fast-food services	25.0%
Personal services	25.0%
Total	**28.5%**

Source: HillPDA

Note that actual capture rates may vary depending on the size, quality and range of the retail offer.

Table 26 shows ultimate potential retail sales the retail centre could achieve assuming the above capture rates. The result is a potential to capture $16.6 million from MTA residents by 2036 under the lower growth scenario and $18.5 million under the higher growth scenario.

Table 26: Total potential sales

Scenario / retail store type	2026	2031	2036	2041
Lower growth				
Supermarkets and grocery stores	6.8	8.8	11.3	14.5
Specialised food stores	1.7	2.1	2.7	3.4
Bulky goods stores	0.0	0.0	0.0	0.0
Department stores	0.0	0.0	0.0	0.0
Apparel stores	0.0	0.0	0.0	0.0
Other non-food stores	0.5	0.6	0.8	1.0
Restaurants and fast food services	0.8	1.0	1.3	1.7
Personal services	0.3	0.4	0.5	0.6
Total	**10.1**	**12.9**	**16.6**	**21.2**
Higher growth				
Supermarkets and grocery stores	7.1	9.4	12.6	16.8
Specialised food stores	1.7	2.3	3.0	4.0
Bulky goods stores	0.0	0.0	0.0	0.0
Department stores	0.0	0.0	0.0	0.0
Apparel stores	0.0	0.0	0.0	0.0
Other non-food stores	0.5	0.7	0.9	1.2
Restaurants and fast food services	0.8	1.1	1.5	2.0
Personal services	0.3	0.4	0.5	0.7
Total	**10.5**	**13.9**	**18.5**	**24.7**

Source: ABS retail sales data; HillPDA Research

Please note also that the above figures make an allowance for 5 per cent of sales to be derived from beyond the trade area. This includes residents that live further afield, workers in the locality and day trippers.

5.4 Demand for shop front space

Demand for shop front space is calculated by dividing potential retail sales by industry target retail turnover density levels ($/sqm). Target RTDs are derived from a number of sources including ABS Retail Sales, ABS Retail Survey 1998-99, Shopping Centre News, Property Council of Australia, Urbis Retail Averages, various annual reports and other consultancy studies. The results are shown in Table 27.

Table 27: Floorspace demand by broad retail type

Retail Store Type	Target RTD ($/sqm)*	2026	2031	2036	2041
Lower growth scenario					
Supermarkets and grocery stores	11,000	607	761	955	1,197
Specialised food stores	9,500	173	215	266	330
Bulky goods stores	3,500	0	0	0	0
Department stores	3,500	0	0	0	0
Apparel stores	5,000	0	0	0	0
Other non-food stores	5,000	98	123	154	192
Restaurants and fast food services	6,500	120	151	190	239
Personal services**	4,000	73	91	114	141
Total retail	9,222	1,072	1,341	1,678	2,100
Non-retail shopfront***		93	116	145	181
Total		**1,165**	**1,457**	**1,823**	**2,281**
Higher growth scenario					
Supermarkets and grocery stores	11,000	630	820	1,068	1,390
Specialised food stores	9,500	180	231	298	383
Bulky goods stores	3,500	0	0	0	0
Department stores	3,500	0	0	0	0
Apparel stores	5,000	0	0	0	0
Other non-food stores	5,000	102	132	172	223
Restaurants and fast food services	6,500	125	163	213	278
Personal services**	4,000	76	98	127	164
Total retail	9,222	1,113	1,445	1,877	2,438
Non-retail shopfront***		97	125	162	210
Total		**1,209**	**1,570**	**2,039**	**2,648**

* Assumes to increase at 0.5% per annum for food and food services and 0.25% for non-food retailing

** Including hair and beauty, laundry, clothing hire and alterations, optical dispensing

*** Assumes 20% of non-grocery retail floorspace and includes financial, real estate, travel and medical services that occupy shop front space

With no other traditional retail space provided or planned within the MTA, the above retail demand analysis identifies demand for 1,450 square metres of shopfront space by 2031 under lower growth scenario and 1,570 square metres under the high growth scenario, increasing to 2,281 square metres by 2041 under the lower growth and 2,648 square metres under the higher growth scenario. This would suggest that the site has the potential to support a centre of approximately 1,450 square metres by 2031 which could include a supermarket of 750-900 square metres (such as an IGA), along with a small provision of speciality shops. In the early years of the site's development, the centre may trade below industry targets due to lower population levels, particularly under the lower growth scenario. However, establishing a centre early on enhances the amenity, attractiveness, and marketability of the estate. Once the estate and surrounding areas establish the retail centre trading levels should improve.

5.5 Impacts on other centres

If the retail centre were to capture the amount of trade identified in Section 5.3.4 there would still be sufficient expenditure remaining across the trade area to ensure minimal impact to nearby centres such Forbes Town Centre. We would not expect a centre of 1,800-2,000 square metres to trade much above $12 million (which is $8,500 per square metre, in line with the average trading levels for similar size centres throughout Australia). If it traded at this level in 2031 it would only be capturing around 26 per cent of trade area expenditure under the high growth scenario (allowing for 5 per cent of trade from other sources). This leaves 74 per cent of expenditure to be directed to other existing and proposed centres in the Forbes LGA, including the Forbes Town Centre.

Moreover, the analysis indicates that there is a clear demand for increased retail space in the trade area to appropriately service the local community. Such provision of space would increase the liveability, productivity and sustainability of the new suburb while also reducing the need for residents to travel further than necessary to access essential services.

Although the Town Centre is relatively close to the site (around five kilometres away), establishing a centre on site would not only provide residents with convenient access to their everyday retail shopping needs but also deliver numerous additional economic advantages. These benefits include time and cost savings for residents' journeys and positive environmental impacts. Additionally, the retail space provided at the site would provide Forbes with increased resilience to natural disasters, as the existing retail and commercial space in Forbes' centre is subject to risk from flooding.

6.0 ECONOMIC IMPACT ASSESSMENT

This chapter examines the potential economic impacts associated with proceeding with the proposed development during the construction phase and post-construction (operational) phase. The economic impacts of the proposed development are measured against the base case ('do nothing' or 'status quo' option).

For the purposes of this analysis we have assumed the following uses:[6]

- 745 single dwellings
- Supermarket or convenience store of 850 square metres (GFA)
- Specialty shops (including a café) totalling 600 square metres (GFA)
- Allied health of 850 square metres (GFA)
- Child care of 700 square metres (GFA)
- Gym of 950 square metres (GFA)
- 100 car spaces[7] and
- A small provision of open space / parks to service the on-site residents.

6.1 Economic impact assessment approach

6.1.1 Economic impact phases

Economic impacts are measured at both the construction phase and operational phase.

- **Design and construction phase:** is the economic activity generated and supported by the design and construction of the estate. These impacts are expected to be short-term, concluding when construction activity is completed. The base case assumes no construction activity and hence is not assessed in this phase.
- **Operational phase (post-construction):** is the annual economic activity generated by operations post construction measured against the base case (no redevelopment option).

6.1.2 Key performance indicators

The modelling for this report is based on the Australian National Accounts Input Output tables 2020-21. Four key performance indicators were adopted to measure the economic impacts as described in Table 28.

Table 28: Economic impact metrics assessed

Performance Indicator	Description
Gross output	Output is a gross measure of the total sales generated by the types of land uses present on the site or in the proposal
Employment	Employment generated by the types of land uses present on the site or in the proposal (either full time or part time)
Remuneration	Gross wages and salaries paid to workers
Gross value added	Gross value added (GVA) of an industry refers to the value of outputs less the costs of inputs. It measures the contribution that the industry makes to the country's wealth or gross domestic product (GDP).

6.1.3 Economic multipliers

Economic multipliers refer to the level of additional economic activity generated or supported by a source industry. There are two types of effects captured by multipliers:

[6] As advised by the client
[7] Allows for an additional 11 parking spaces beyond the minimum requirements outlined in the DCP.

Production induced effects: which is made up of:

- *First round effects:* which are all outputs and employment required to produce the inputs for the source industry, and
- *Industrial support effects:* which is the induced extra output and employment from all industries to support the increased production by suppliers in response to increased sales.

Consumption induced effects: which relates to the demand for additional goods and services due to increased spending by the wage and salary earners across all industries arising from employment.

As discussed above for the purpose of this report economic impacts have been assessed at NSW State level.

Limitations with multipliers

Both the ABS and the NSW Treasury Employment Calculator describe several limitations with input-output multipliers, or at least shortcomings with typical interpretations of the multipliers, which generally result in an over-estimation of impacts. The main shortcomings or limitations are as follows:

- Production induced impacts can leave the impression that extra output can be produced without taking resources away from other activities.
- Multipliers assumed fixed input ratios and hence measure impacts based on average effects rather than marginal effects.
- The impacts are nationwide and are not regional or local impacts which would be smaller.

Other limitations are described in both the NSW Treasury Guide and on the ABS website.[8]

6.2 Economic impacts from design and construction

Re-development of the site in accordance with the uses outlined above would require capital investment, which would drive economic activity and create employment. The construction and design costs (i.e. Capital Investment Value or CIV) for proposed development are estimated to be around $643.4 million and are calculated as follows:

- 745 single dwellings at a rate of $550,000/dwelling[9]
- Non-residential uses at a rate of $3,000/ square metres[10]
- Car parking at $3,500 per space[11]
- Land development costs at $1.6 million / hectare[12]
- Contingencies set at 10 per cent
- Design, project management, and application fees, totalling 8.5 per cent of land development and non-residential building costs.

Based on this estimate, the following assesses the economic activity supported on site and statewide during the construction phase.

6.2.1 Gross output from construction

The proposal will have a direct impact on construction output as well as indirectly stimulating other industries which assist in production and cater to increased consumption.

[8] https://www.abs.gov.au/statistics/economy/national-accounts/australian-national-accounts-input-output-tables/latest-release
https://www.treasury.nsw.gov.au/information-public-entities/nsw-treasury-employment-calculator
[9] Assumes a single level 3 to 4 bedroom dwelling with standard finishes; Source: various local and project home builder websites
[10] Source: Rawlinsons Australian Construction Handbook; RLB; and various consultancy reports
[11] Source: Rawlinsons Australian Construction Handbook; RLB; and various consultancy reports, Forbes Development Control Plan 2013 (V2)
[12] This includes open space / parks; Source: RLB and various consultancy reports

Table 29 details the output multipliers and shows the impact of the change in demand supported by the development and the impact on the NSW economy. The forecast increase in total output supported Statewide is estimated at approximately $1.8 billion (directly and indirectly).

Table 29: Gross output from design and construction ($2022million)

	Direct effects	Production induced effects		Consumption induced effects	Total
		First round effects	Industrial support effects		
Total output ($m)	643.4	385.0	352.1	452.5	1,833.0

Source: HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21

6.2.2 Gross value added

The Gross Value Added (GVA) of an industry refers to the value of outputs less the costs of inputs. It also measures the contribution that the industry makes to the region's wealth or gross state product (GSP). The main components of GVA are workers' remunerations, profits and government taxes.

As shown in Table 30, the CIV would directly contribute around $189.9 million to NSW GSP. When taking into account the multiplier effects, the GVA generated and/or supported by the project would reach a total of $733.9 million across the state.

Table 30: Construction GVA impact ($million) (2022 dollars)

	Direct effects	Production induced effects		Consumption induced effects	Total
		First round effects	Industrial support effects		
Total GVA ($m)	189.9	148.3	155.3	240.5	733.9

Source: HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21

6.2.3 Job creation from construction

Each million dollars of design and construction work undertaken generates 2.2 job years[13] directly.[14] Based on the estimated construction and design costs 1,354 job years would be directly generated.

Including the multiplier impacts the works are forecast to generate and/or support a total of 5,161 job years statewide. The number of job years (direct and indirect) supported by the construction and design works of this project are shown in Table 31.

Table 31: Construction related employment

	Direct effects	Production induced effects		Consumption induced effects	Total
		First round effects	Industrial support effects		
Total job years	1,354	1,160	1,092	1,555	5,161

Source: HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21

6.3 The base case

The site is currently used for low intensity rural activities which contribute to minimal job opportunities and economic activity. Therefore, any employment opportunities and economic activity generated by the proposed development once it becomes operational would constitute a net gain over the base case.

[13] Note: One job year equals one full-time job over one year
[14] Source: ABS Australian National Accounts: Input – Output Tables 2019-20 (ABS Pub: 5209.0)

6.4 Economic impacts from the proposal in operational phase

6.4.1 Employment

The proposed land uses are expected to support permanent jobs on-site once they are operational. It is estimated that these uses, when combined, will support a total of 122 Full-Time Equivalent (FTE) jobs on-site, distributed as follows:

- The convenience and specialty retail components are projected to employ approximately 44 FTE workers, assuming a rate of 33 square meters of Gross Leasable Area Retail (GLAR) per worker.[15]
- The childcare facility is expected to employ 13 FTE workers, assuming a 65-place childcare capacity[16] with one worker per 5 children.[17]
- The gym is anticipated to employ 9 FTE workers, based on a rate of one worker per 108 square meters.
- The allied health component is estimated to employ 21 workers, assuming a rate of one worker per 42 square meters.[18]
- Additionally, there will be residents who primarily work from home. It is assumed that 6.0 per cent of workers will work mainly from home, or 6.0 per cent of the total paid work hours will be done at home.[19] According to Census data, there is an average of 1.05 working residents per occupied dwelling, which translates to one job per 16 occupied dwellings. Based on this analysis, it is estimated that there will be 36 FTE home-based workers on-site when the development is fully occupied, assuming an 11 per cent vacancy rate.

Accounting for multiplier effects, total employment directly generated and indirectly supported by the development statewide is estimated at 244 FTE jobs per annum.

6.4.2 Gross output from operations

Table 32 provides an estimate of the output that could be supported on site and statewide per annum. It is estimated that the proposed development could directly generate $21.3 million in gross output per annum. Accounting for multiplier effects, total output directly and indirectly supported by the proposed development statewide is estimated at $56.9 million per annum.

[15] Various sources including ABS Retail Survey 1998-99, NSW Government Common Planning Assumptions, City of Sydney Floor Space and Employment Survey 2017, various consultancy studies and HillPDA estimates from ABS I/O Tables, IBIS World reports and reported mean annual turnovers of shopping centres (PCA and Shopping Centre News).

[16] The assumed 65-place childcare capacity has been based on the floor areas provided, adherence to DPE Child Care Planning Guidelines thresholds, and a comprehensive assessment of local childcare facilities in the area.

[17] Various sources including DPE Child care planning guidelines, ABS Retail Survey 1998-99, NSW Government Common Planning Assumptions, City of Sydney Floor Space and Employment Survey 2017, various consultancy studies and HillPDA estimates from ABS I/O Tables, IBIS World.

[18] Various sources including ABS Retail Survey 1998-99, NSW Government Common Planning Assumptions, City of Sydney Floor Space and Employment Survey 2017, various consultancy studies and HillPDA estimates from ABS I/O Tables, IBIS World reports.

[19] In Forbes UCL 6% of residents worked at home during Census 2021. However this occurred during COVID lockdown. In 2016 the rate was slightly lower at 4%. While currently workers are returning to the office COVID is having some long term impacts including a high proportion of white collar workers continuing to work from home and/or working under more flexible working arrangements including some proportion of working from home. This is expected to continue in the long term and is having an adverse impact on the demand for office space with as much as a 20% reduction predicted from industry experts. As such we have assumed a rate of 6% of residents worked at home.

Table 32: Operational phase - economic output ($m/ann) (2022 dollars)

	Direct output	Production induced		Consumption induced	Total
		First round	Industrial support		
Gross Output	21.3	8.5	6.2	21.0	56.9

Source: Australian National Accounts Input Output tables 2020-21, IBIS World Reports 2023, HillPDA
Totals may not sum due to rounding

6.4.3 Remuneration of workers on site

Table 33 provides an estimate of the renumeration that could be supported on site and statewide per annum. On completion, remuneration of workers on site during the operational phase is estimated at approximately $8.4 million per annum. Accounting for multiplier effects, total renumeration directly and indirectly supported by the proposed development statewide is estimated at $17.9 million per annum.

Table 33: Operational phase - staff renumeration ($m/ann) (2022 dollars)

	Direct output	Production induced		Consumption induced	Total
		First round	Industrial support		
Staff remuneration	8.4	2.5	1.6	5.3	17.9

Source: Australian National Accounts Input Output tables 2020-21, IBIS World Reports 2023, Profile.id, HillPDA
Totals may not total due to rounding

6.4.4 Gross value added from operations

Once operational, it is estimated that the development could directly contribute $11.5 million in GVA to NSW GSP per annum. Accounting for multiplier effects, total GVA directly and indirectly supported by the proposed development statewide is estimated at $30.0 million per annum as shown in Table 34.

Table 34: Operational phase - gross value added ($m/ann)

	Direct output	Production induced		Consumption induced	Total
		First round	Industrial support		
GVA	11.5	4.3	3.0	11.2	30.0

Source: Australian National Accounts Input Output tables 2020-21, IBIS World Reports 2023, Profile.id, HillPDA
Totals may not total due to rounding

6.5 Net economic impact summary

Compared to the base case (which assumes no jobs are supported on site) the proposed development would support a more intensified economic outcome. The net increase in economic activity supported by the development on site and statewide once the development is fully operational, when compared to the base case, is estimated at:

- **Employment:** a net increase of 122 jobs directly on site and a further 123 jobs supported statewide through multiplier impacts
- **Gross output:** a total increase of around $56.9 million in gross output per annum (including $21.3 million directly)
- **Remuneration:** a total increase of $17.9 million per annum (including $8.4 million directly).
- **GVA:** an increase of $11.5 million per annum directly generated by jobs on site and a further $18.5 million supported statewide through multiplier impacts.

The net impact of the proposed development once it is fully operational versus the base case is presented in Table 35.

Table 35: Net economic impacts

Net economic impact	Direct	Indirect	Total
Employment (FTE)	122	123	**244**
Gross output ($ million per annum)	21.3	35.6	**56.9**
Remuneration of workers ($ million per annum)	8.4	9.4	**17.9**
GVA ($ million per annum)	11.5	18.5	**30.0**

Source: HillPDA

6.6 Other economic impacts

6.6.1 Impacts on local businesses

The proposed development would provide around 745 new residential dwellings on site. Assuming 89 per cent of the dwellings are occupied and an average occupancy rate of 2.4 persons per dwelling we estimate 1,591 permanent residents on site when fully developed.

These residents would generate demand for local retail and commercial goods and services. With an assumed average retail spend of around $14,736 per capita[20] the residents would spend around $23.4 million every year on retail goods and services. Assuming the proposed centre captures $11.7 million of this residential spend,[21] the Forbes town centre is expected to be a major beneficiary of the residual retail spend ($11.7 million). The balance would be captured by other centres in outside the LGA such as Parkes, Dubbo and Orange.

6.6.2 Investment stimulus

Where a significant property investment decision has been made it is generally viewed as a strong positive commitment for the local area. Such an investment can in turn stimulate and attract further investment. The direct investment in the site would support a wide range of economic multipliers as outlined above which would in turn support investment in associated industries. It would also raise the profile of Forbes to potential investors and in doing so increase the financial feasibility of similar types of developments, potentially acting as a catalyst on surrounding sites. From an economic perspective, this is a good outcome given that it maximises the potential of this site and creates a greater economic benefit from it.

[20] This is equivalent to Forbes average based on 2022 ABS expenditure data

[21] Assumes centre trades at $8,500/sqm in line with the average trading levels for similar size centres throughout Australia and excludes trade from beyond and other sources at 5%

SOCIAL IMPACT ASSESSMENT

7.0 SOCIAL IMPACT ASSESSMENT

This chapter examines the potential social impacts that may arise should the proposal be approved, constructed, and developed to full extent.

Our assessment aligns with the approach outlined in section 3.1. Changes predicted to arise from the proposal are considered against the social baseline established in chapters 3.0 and 4.0. For the purposes of this assessment, we have assumed that the proposal (at full development) would consist of:

- 745 dwellings
- An estimated resident population of around 1,560 people
- An open space corridor with active transport, areas for conservation, and open space and recreation areas
- A village centre style shopping precinct.

These assumptions are based on the draft indicative masterplan associated with the proposal, current as at the time of writing. The findings in this section would require revision should the proposal change.

7.1 Assessment

7.1.1 Construction impacts

An evaluation of potential social impacts and mitigation responses during the construction phase of the proposal is shown in Table 36.

Table 36: Construction impact assessment

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Way of life			
Noise and vibration from construction activity may negatively affect amenity for residents, workers and businesses surrounding the site, impacting upon quiet enjoyment of surroundings, way of life and health and wellbeing. This impact is also likely to lead to cumulative impacts as development to Forbes' north and northwest progresses.	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium	• Prepare a construction management plan (or similar) that considers noise and vibration impacts at the detailed design phase.	• **Likelihood:** Likely • **Magnitude:** Minimal • **Significance:** Low
Community			
Major projects that are of a high significance or scale (compared to the locality) can cause conflict in communities between people who support the proposal and people who are against it.	• **Likelihood:** Possible • **Magnitude:** Minimal • **Significance:** Low	• Extensive strategic planning and community consultation has been undertaken by Council over a number of years, aligning expectations for the future of the site. • Prior to construction works commencing, prepare a strategy to manage and address any communications and complaints from community members.	• **Likelihood:** Unlikely • **Magnitude:** Minimal • **Significance:** Low
Access			
Additional construction vehicle movements may increase congestion on surrounding roads, impacting way of life, access and livelihoods for surrounding residents, workers, and businesses. Further, any road closures required to facilitate construction works at the site could impact access, causing disruptions or delays for some people.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• At the detailed design phase, prepare a construction traffic management plan (or similar) that considers site access routes and identifies the potential level of additional traffic. • Avoid or minimise road closures as far as possible.	• **Likelihood:** Unlikely • **Magnitude:** Minor • **Significance:** Low
Existing residents near the site could be impacted by any interruption to utilities caused by works at the site.	• **Likelihood:** Unlikely • **Magnitude:** Minimal • **Significance:** Low	• Provide notification of any service interruption required in advance.	• **Likelihood:** Unlikely • **Magnitude:** Minimal • **Significance:** Low

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Culture			
Potential impact on community and culture through fear of impacts to Aboriginal cultural heritage sites during construction.	• **Likelihood:** Possible • **Magnitude:** Minor **Significance:** Medium	• The proponent engaged an archaeologist to undertake an Aboriginal Due Diligence Assessment survey at the site. The survey determined that the site had low potential for Aboriginal archaeological sites, due to factors including significant disturbance from agricultural activities. • Consult with the relevant Local Aboriginal Land Council prior to undertaking any construction works at the site. • Cease works in the vicinity if an unexpected find is discovered and contact an archaeologist to assess the situation.	• **Likelihood:** Unlikely • **Magnitude:** Minor • **Significance:** Low
Health and wellbeing			
Dust from construction activity could cause a decline in air quality, potentially impacting the amenity of surroundings and health and wellbeing of neighbouring residents and workers.	• **Likelihood:** Likely • **Magnitude:** Minimal • **Significance:** Low	• Carry out construction works using standard dust mitigation measures (as necessary).	• **Likelihood:** Possible • **Magnitude:** Minimal • **Significance:** Low
Surroundings			
Impacts to landscape and visual amenity may occur as construction works proceed, contributing to feels of loss of connection and change in character of the surroundings.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium	• None possible	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium
Impact to surroundings, community cohesion and wellbeing, mental health, and amenity through clearing of land required for construction.	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium	• The majority of the site is cleared at present. • Ensure that existing vegetation and significant trees are retained wherever possible. • The proposal would result in significant landscaping and tree planting at the site.	• **Likelihood:** Possible • **Magnitude:** Minimal • **Significance:** Low
Livelihoods			
The proposal would create around 1,350 full time equivalent job years directly through construction activity, providing a significant positive impact to livelihoods. This would also have flow-on effects to the broader Forbes community and economy. Benefits would be of increased significance noting the existing socio-economic disadvantage present in Forbes' north. Providing employment opportunities near where residents live would be a significant benefit.	• **Likelihood:** Almost certain • **Magnitude:** Moderate (positive) • **Significance:** High (positive)	• At the detailed design phase, consider appropriate mechanisms to maximise local worker employment.	• **Likelihood:** Almost certain • **Magnitude:** Moderate (positive) • **Significance:** High (positive)

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Decision making systems			
Potential feeling of powerlessness or lack of means to have input or say on the proposal during construction for surrounding properties and the wider community, negatively impacting decision-making systems	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• Extensive strategic planning and community consultation has been undertaken by Council over a number of years, aligning expectations for the future of the site. • The proposal would be subject to a public exhibition period. • Regularly communicate with the public about the progress of the proposal during the construction period. • Provide information about communications and complaints protocols to neighbouring premises prior to any works commencing.	• **Likelihood:** Unlikely • **Magnitude:** Minor • **Significance:** Low

7.1.2 Operational impacts

An evaluation of potential social impacts and mitigation responses during the operational phase of the proposal is shown in Table 37.

Table 37: Operational impact assessment

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Way of life			
Increased traffic congestion on local roads from increased number of vehicle movements to the site could impact on way of life and access for local residents and workers, and livelihoods for nearby businesses.	• **Likelihood:** Possible • **Magnitude:** Minimal • **Significance:** Low	• In consultation with Council, undertake a traffic study at the detailed design phase.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Low
The proposal would enable 745 residential lots to be developed in Forbes, helping the Shire to accommodate its growing population. The proposal provides housing at a range of lot sizes, with a limited number of larger lots that Forbes' existing housing market has adequate supply of.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)	• In collaboration with Council, consider opportunities to partner with a Community Housing Provider to deliver additional housing within the proposal as affordable or social housing. • In collaboration with Council, consider mechanisms (such as a site-specific development control plan, maximum lot size, or minimum density provision) that ensure that the site delivers diverse housing (in terms of lot size and typology). • Ensure that proposed minimum lot sizes and lots delivered are aligned. Where lots significantly larger than the proposed minimum lot size are indicated, provide long-term housing flexibility for Forbes (where appropriate) by enabling future subdivision to the minimum lot size (eg deliver lots at 800sqm instead of 700sqm).	• **Likelihood:** Almost certain • **Magnitude:** Moderate • **Significance:** High (positive)
Community			
An influx of new residents moving into an established community in high volumes (compared to the existing population) could cause negative impacts to community cohesion.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• The proposal would lead to the development of the site over 10 to 15 years, minimising any potential impacts to community cohesion.	• **Likelihood:** Unlikely • **Magnitude:** Minimal • **Significance:** Low
Access			
The addition of 745 lots and 1,560 people at the site would result in significant additional road traffic.	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium	• The proponent is preparing a Traffic Assessment for the site which will consider the potential impacts of the project on the surrounding road network. • The proposal includes significant active transport infrastructure, reducing car dependence. • The future road network would be designed to align with Council's vision for the wider area, and access points would be designed and constructed in alignment with anticipated future development.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Increased access for current and future Forbes residents to active transport through the provision of shared paths in the proposed development.	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium (positive)	• Ensure that active transport within the proposal supports leisure use as well as purposeful trips, reducing the need for residents (particularly children) to travel by car by: – Providing safe routes through and between neighbourhoods and to key destinations like schools and shops – Planning street layouts that enable direct travel for pedestrians and cyclists (shorter blocks, mid-block through lanes, and legible layouts). • In collaboration with Council, determine key active transport destinations and future network investments. At the detailed design stage, ensure that the proposal aligns with these.	• **Likelihood:** Likely • **Magnitude:** Moderate • **Significance:** High (positive)
Ongoing increase in demand for social infrastructure associated with the addition of around 1,560 people at the site. This could cause reduced access for current and future Forbes residents. Increased demand which cannot be met by the existing provision includes: • Demand for playgrounds, local open spaces, town open spaces, and recreation open spaces in general • Demand for a local community centre • Demand for childcare (long day care) places. For other assessed social infrastructure, existing provision was largely adequate or better, particularly for sporting areas and facilities. However, the site is generally separated from these facilities, reducing access and increasing car dependence for future residents at the site. This is of particular note in relation to sporting areas and access for children and teens, who would be reliant on family members or friends to drive them to sporting facilities.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• Infrastructure contributions generated by the development of the proposal would support increased investment in social infrastructure by Council. • The proposal includes provisions for a playground, childcare centre, and a total of ten hectares of open space. • In collaboration with Council, consider: – Opportunities to provide versatile informal sporting recreation areas or facilities within open space provided (for example, a kick wall or soccer goal, basketball half court, outdoor table tennis tables etc) – Suitable locations to provide play spaces to meet the benchmark of all residents having access to play space within 500 metres of their residence – Opportunities to provide land or floorspace for a future local community centre in the proposed neighbourhood centre – Opportunities to provide land or floorspace for a multi-purpose indoor sporting facility or to deliver such a facility.	• **Likelihood:** Unlikely • **Magnitude:** Minimal • **Significance:** Low

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Existing residents in Forbes' north would have improved access to social infrastructure through the provisions within the proposal.	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium (positive)	• N/A	• **Likelihood:** Likely • **Magnitude:** Minor • **Significance:** Medium (positive)
Improved access to shops and services for residents at the site and surrounding areas through provision of retail and commercial space within the proposed neighbourhood centre. The centre would provide for the day-to-day needs of local residents. Further, the addition of a centre in Forbes' north would provide local residents with flood-free access to essential goods and services.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)	• The proposed neighbourhood centre is located within a ten minute walk of the vast majority of the site. • Ensure that the neighbourhood centre retail and commercial area is able to cater to a range of business size and types to maximise the variety of goods and services available for future residents. • Ensure the future design prioritises active transport by including connections to the centre from all directions, and well-located bicycle parking.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)
Culture			
No impacts identified	*N/A*	*N/A*	*N/A*
Health and wellbeing			
Improved access to open space and recreation areas within the site would support active and healthy lifestyles for future residents and existing local residents.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)	• N/A	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)
Surroundings			
Provision of landscaping and tree plantings on site would positively impact surroundings through amenity, aesthetic, and natural environment improvements.	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)	• N/A	• **Likelihood:** Almost certain • **Magnitude:** Minor • **Significance:** Medium (positive)
Reduced enjoyment of agricultural and rural landscape surroundings for nearby residents through changing land use. This would also present as a cumulative impact alongside ongoing change of land use from rural and agricultural to residential in Forbes' north.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• The proposal includes open, undeveloped areas, as well as significant landscaping and vegetation planting.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium

Impact detail	Evaluation	Mitigation / management measures	Residual evaluation
Livelihoods			
The retail and commercial floorspace proposed for the site would provide benefits to livelihoods through additional employment opportunities in Forbes. The site would provide 121 jobs directly, with further indirect employment to flow from retail and commercial operations at the site, benefiting the Forbes community. This would be of increased significance noting the existing socio-economic disadvantage present in Forbes' north. Providing employment opportunities near where residents live would be a significant benefit.	• **Likelihood:** Almost certain • **Magnitude:** Moderate (positive) • **Significance:** High (positive)	• None required	• **Likelihood:** Almost certain • **Magnitude:** Moderate (positive) • **Significance:** High (positive)
The proposal would contribute additional diverse housing to Forbes' housing supply, supporting affordability by providing smaller lot sizes and dwellings. Smaller households would be more able to find a dwelling suited to their needs at a range of price points, compared to the existing market.	• **Likelihood:** Possible • **Magnitude:** Moderate (positive) • **Significance:** Medium (positive)	• Ensure that diverse housing is delivered on the site, not only separate dwellings on smaller lots. • In collaboration with Council, consider mechanisms to provide community housing or set aside housing to be rental-only.	• **Likelihood:** Likely • **Magnitude:** Moderate (positive) • **Significance:** High (positive)
Decision making systems			
Sense of loss of agency through inability to influence ongoing presence of development and permanent change to physical and social landscape. This would also present as a cumulative impact alongside ongoing change of land use from rural and agricultural to residential in Forbes' north.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium	• The proposal is consistent with the vision and aims of the Forbes LHS, for which extensive community consultation was undertaken.	• **Likelihood:** Possible • **Magnitude:** Minor • **Significance:** Medium

8.0 CONCLUSION

HillPDA prepared this SEIA to assess the likely housing, social infrastructure and economic implications of a planning proposal for a site in Forbes, NSW, and provide any recommendations for how any identified benefits could be enhanced, and mitigations or management measures for any identified impacts.

We found that the proposal is aligned with strategic planning for Forbes, with the north Forbes area earmarked for future residential development in Forbes' LHS. Council has undertaken strategic planning works for this area in consultation with the Forbes community.

The review of Forbes' social baseline undertaken for the SEIA identified a population with high proportions of both young and old people, strong employment, a relatively high Aboriginal population, and household incomes slightly below the rest of regional NSW. Housing costs were seen to be somewhat lower, with fewer households experiencing housing stress.

We also identified a lack of diversity in housing in Forbes, with many large, detached dwellings, but mostly smaller households of one and two people. Population and dwelling demand projections indicate significant growth in Forbes' future, for which 1,800 to 2,100 additional dwellings will be required. Council is keen to ensure that many of these additional dwellings add to Forbes' housing diversity.

Our social infrastructure audit and community needs assessment found that Forbes has a good supply of social infrastructure, especially sporting and education facilities. In general, this provision meets the needs of the existing community. However, the proposal would add around 1,560 people to Forbes, and this would require additional social infrastructure in order to meet the identified benchmarks. The proposed masterplan addresses much of this additional need.

The detailed assessment of retail demand and economic impact of the proposal found that the proposed neighbourhood centre retail and commercial area would be supported by the population and local trade area. It would have minimal impact on the existing Forbes centre and would enable residents at the site to fulfil their everyday needs. The proposal would generate significant employment, totalling over 1,350 job years during construction and 122 full-time equivalent jobs once operational.

The social impact assessment identified a small number of potential negative social and economic impacts, largely typical of all development and able to be sufficiently mitigated. The potential social and economic benefits of the proposal are greater in number and are assessed as being of higher significance.

The potential social impacts and benefits of the proposal must be considered within the context of Forbes' housing market, which has an identified and long-term requirement for additional housing. Addressing this need will require new dwellings, services, and infrastructure to be delivered in Forbes. Therefore, many of the potential social impacts identified in this report are likely to occur in Forbes whether the proposal proceeds or not.

The proponent's collaborative approach to developing a concept masterplan for the site, in combination with the site's consolidation and lack of significant development constraints represent a significant opportunity to deliver social benefits and minimise the risk and scale of any impacts associated with meeting Forbes' housing needs in the short and long term. The proposal would enable the delivery of diverse housing supply, open space, and active transport benefits in Forbes, and would align with Council's vision for the Forbes Shire.

Overall, on social and economic grounds, we consider that the proposal represents a net benefit to the Forbes community.

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