

193-201 Rocky Point Road, 66-68 Ramsgate
Road and 2-6 Targo Road, Ramsgate
Social and Economic Benefits Analysis

Submitted to Georges River Council
On behalf of Capital Hill Group Pty Ltd

Update 27 August 2019 | 218111



CONTACT

Sean Stephens	Group Director	sstephens@ethosurban.com	+61 415 361784
---------------	----------------	--------------------------	----------------

Reproduction of this document or any part thereof is not permitted without prior written permission of Ethos Urban Pty Ltd.

This document has been prepared by:



Mark McManus 27 August 2019

This document has been reviewed by:



Sean Stephens 27 August 2019

Reproduction of this document or any part thereof is not permitted without written permission of Ethos Urban Pty Ltd. Ethos Urban operates under a Quality Management System. This report has been prepared and reviewed in accordance with that system. If the report is not signed, it is a preliminary draft.

VERSION NO.	DATE OF ISSUE	REVISION BY	APPROVED BY
3	27 August 2019	Mark McManus	Sean Stephens

Ethos Urban Pty Ltd
ABN 13 615 087 931.
www.ethosurban.com
173 Sussex Street, Sydney
NSW 2000 t 61 2 9956 6952

Contents

1.0	Introduction	2
1.1	Study Aim and Objective	2
1.2	Methodology and Approach	2
1.3	Data Sources and Assumptions	2
2.0	Context for Project	4
2.1	Site Location	4
2.2	Proposed Development	5
2.3	Strategic Planning and Policy Framework	5
3.0	Community and Economic Profile	9
3.1	Existing Community and Economic Profile	9
3.2	Future Community and Economic Profile	11
4.0	Social and Economic Benefits	12
4.1	Employment	12
4.2	Increased Local Expenditure	13
4.3	Increased Expenditure from Residents	13
4.4	Creating a Local Centre	14
4.5	Catalyst to Revitalising the Area	16
4.6	Improving the Retail Experience and the Viability of Existing Retail	16
4.7	Providing Parking that can Support the Wider Ramsgate Local Centre	16
4.8	Other Benefits	16
5.0	Conclusion	18

Figures

Figure 1	Site Context	4
Figure 2	Site Plan	5
Figure 3	Primary Study Area - Kogarah Bay - Carlton – Allawah, Sans Souci – Ramsgate, and Kogarah Statistical Area 2 (SA2)	9

Tables

Table 1	Population and Age Projections – 2016 to 2036	11
Table 2	Estimated Retail and Medical Related Jobs	13
Table 3	Increased Retail Expenditure from Residents	14
Table 4	Usual Residence Statistics	19
Table 5	Place of Work Statistics	22

Appendices

Appendix A.	Demographics Data	19
-------------	-------------------	----

1.0 Introduction

Capital Hill Group Pty Ltd are seeking approval to amend the height and Floor Space Ratio (FSR) controls as they relate to land at 193-201 Rocky Point Road, 66-68 Ramsgate Road and 2-6 Targo Road, Ramsgate (the Subject Site). The purpose of the proposed LEP amendments is to facilitate the future delivery of a comprehensive, high quality town centre regeneration scheme comprising a mix of residential apartments, full line supermarket, speciality retail, medical/commercial suites and a child care centre together with a new public square, laneway and streetscape improvements. This project will significantly improve the vibrancy, activity and economic vitality of the centre, and facilitate further regeneration of the centre and surrounding area.

This Economic Benefits Statement highlights the social and economic benefits of the proposed concept scheme, and is intended to assist the Georges River Council in assessing the merits of the Planning Proposal.

1.1 Study Aim and Objective

The aim of this Social and Economic Benefits Statement is to provide an assessment of the economic and social outcomes associated with the indicative development concept that accompanies the Planning Proposal, with an emphasis on the local area.

To achieve this, the analysis seeks to:

- Outline the social and economic profile of the area
- Estimate the number of direct jobs generated by the proposal during both the construction and operational stages
- Identify the social benefits that will be delivered to the surrounding area
- Identify the economic benefits that will be realised as a result of the growth in the local workforce
- Provide an overview of the types of new local business opportunities that would be created as a result of the proposal, and
- Highlight how the proposed development concept aligns with key strategic planning and economic policies and strategies

1.2 Methodology and Approach

The following methodology and approach has been applied in preparing this Social and Economic Benefits Statement:

- Undertake a review of the strategic land use policies relevant to the project
- Undertake a socio-economic review of the relevant surrounding study area and benchmark areas based on available ABS Census and other data sources (as referenced)
- Undertake an analysis of population and demographic forecasts based on available sources (as referenced)
- Carry out other investigations as required and as detailed in this report, and
- Identify and discuss the social and economic benefits that will be delivered to the local area as a result of the indicative development concept.

1.3 Data Sources and Assumptions

Data sources used in this report include:

- Australian Bureau of Statistics. 2011 and 2016. Census of Population and Housing.
- Transport for NSW. 2017. Travel Zone Projections (TZP 2016) for Population, Workforce & Employment in the Sydney Greater Metropolitan Area.

Assumptions required to complete this analysis include:

- Data recorded by the ABS and Transport for NSW are accurate
- The estimated Capital Investment Value (CIV) range is accurate
- Assumptions related to job per sqm are accurate, and
- The Kogarah Bay - Carlton – Allawah, Sans Souci – Ramsgate, and Kogarah Statistical Area 2 ABS definitions adequacy reflect the local area to analyse the desirability and suitability of the Planning Proposal .

2.0 Context for Project

2.1 Site Location

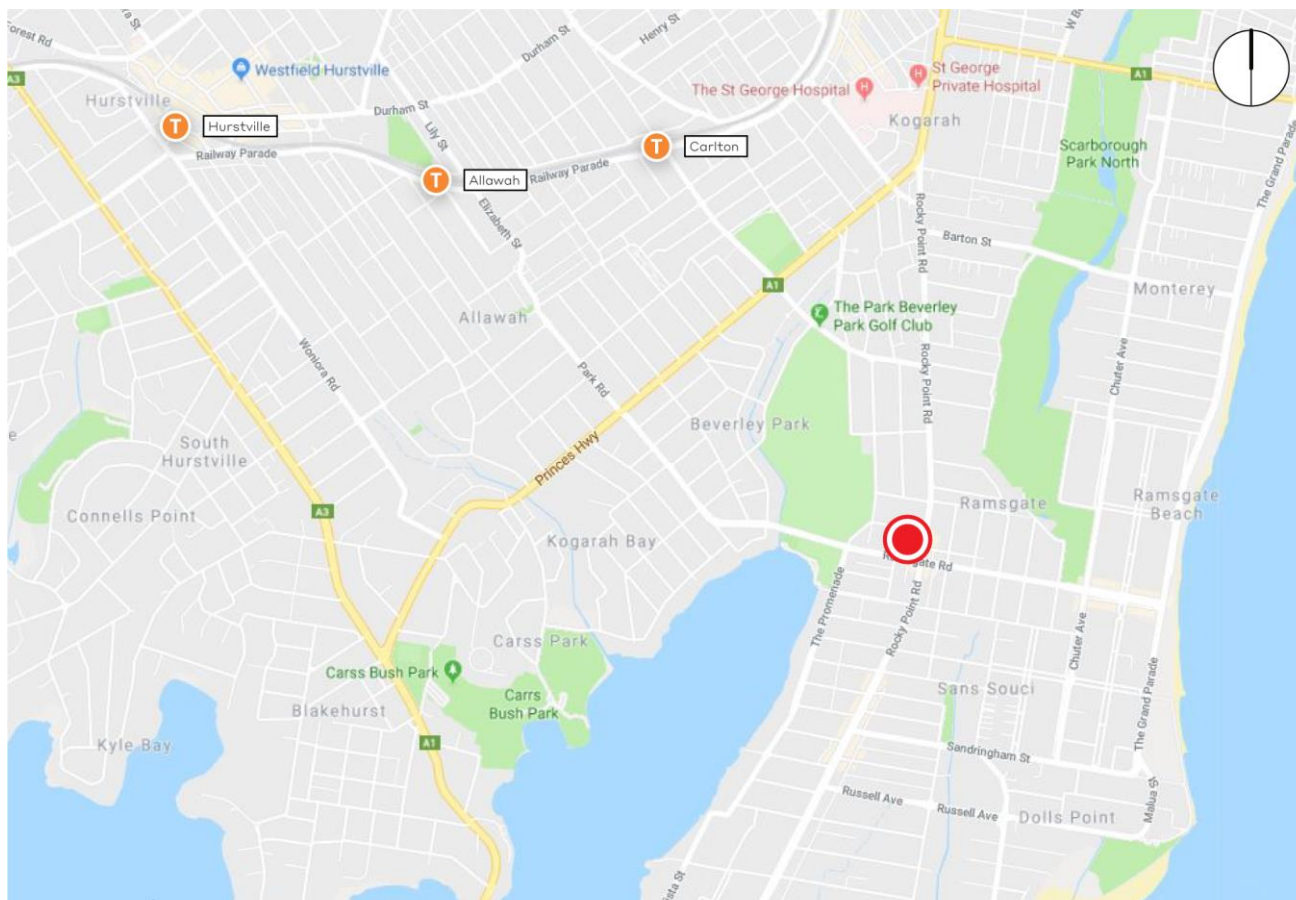
The Subject Site is located in the Georges River Local Government Area (Georges River) at 193-219 Rocky Point Road, 66-68 Ramsgate Road and 2-6 Targo Road, Ramsgate. Ramsgate is located 16km south of the Sydney Central Business District (CBD) and 5km south west of Sydney Airport. Botany Bay is located 1.1km to the east of the Subject Site and Kogarah Bay 400m to the southwest. Ramsgate is surrounded by the suburbs of Beverley Park, Monterey, Ramsgate Beach, Kogarah, Dolls Point and Sans Souci.

Rocky Point Road is the primary thoroughfare through Ramsgate, connecting the Princes Highway in the north through to the Sutherland Shire to the south via the Captain Cook Bridge. Rocky Point Road around the Subject Site and in Sans Souci is generally comprised of ground floor retail, with various developments above including residential developments of up to six storeys.

Ramsgate is surrounded by large recreational areas including Leo Smith Reserve (600m to the east of the site) and the Beverley Park Golf Club (300m to the west of the site).

The closest railway station to the site is Carlton, 2km to the northwest. Bus stops are immediately adjacent the site on both Ramsgate Road and Rocky Point Road which service the following routes:

- 476: Rockdale to Dolls Point (loop service);
- 477: Miranda to Rockdale; and
- 947: Kogarah to Hurstville via Dolls Point.



The Site

Figure 1 Subject Site Context

An aerial photo of the Subject Site is shown at **Figure 2**.



 The Site

Figure 2 Subject Site Plan

2.2 Proposed Development

This Planning Proposal aims to put in place planning controls that will facilitate the site's future redevelopment generally in accordance with the indicative development concept that accompanies the Planning Proposal. Once delivered, the indicative development concept will create a focal point of the Ramsgate town centre to be known as 'Ramsgate Village' and which comprises:

- A publicly accessible village square and through-site link with landscaped elements
- Three mixed-use buildings up to a maximum of 10 storeys
- Ground floor retail including a subterranean supermarket
- Four (4) levels of basement accommodating the supermarket and underground car parking.

2.3 Strategic Planning and Policy Framework

A high-level review of key strategic planning and policy documents relevant to the project from an economic and social perspective is provided below. A comprehensive strategic planning and policy framework for the site is provided within the Planning Proposal report.

2.3.1 A Metropolis of Three Cities – The Greater Sydney Region Plan

The Greater Sydney Regional Plan identifies key challenges facing Sydney including a population increase to 8 million by 2056, and the need to facilitate 725,000 additional dwellings and 817,000 more jobs. In this respect, the proposed development provides additional housing and employment opportunities.

The Plan identifies that liveability in Greater Sydney requires more than just homes and jobs, they need to enhance wellbeing and a sense of community identify by delivering safe, inclusive and walkable mixed-use areas. As such, the Planning Proposal assists in achieving this objective by providing high quality mixed used development that includes a generous publicly accessible open public space anchored by a full line supermarket and supported by a range of retail and medical services.

Ramsgate town centre will benefit from a much-needed community open space area sufficient in size to host markets and other community events, and which will significantly improve the functionality of Ramsgate centre as well as the liveability and amenity for local residents.

2.3.2 South District Plan

District Plans give effect to The Greater Sydney Region Plan. The Subject Site is located on the boundary of the areas covered by the South District Plan (west of Rocky Point Road and inclusive of the Subject Site) and East City District Plan (east of Rocky Point Road). According to the Eastern City District Plan a Local Centre is identified for 'Ramsgate', although the specific location of the centre is not clear in the map provided. Subsequently, Council's draft LSPS has identified the Ramsgate Local Centre, inclusive of the Subject Site, as a Local Centre.

Local centres are identified in the District Plans as important locations for infrastructure and service delivery for the surrounding communities which they serve. Local centres are diverse and vary in size, and are intended to provide access to day to day goods and services in a location close and thus accessible to where people live. As such, the Ramsgate town centre – operating as Local Centre in the hierarchy - has an important role to play in providing an enhanced range of facilities, including those included in the Planning Proposal.

Of further relevance are the following priorities identified in the South District Plan under the liveability objective:

- *Fostering healthy, creative, culturally rich and socially connected communities;*
- *Providing housing supply, choice and affordability, with access to jobs, services and public transport; and*
- *Creating and Renewing great places and local centres, and respecting the District's heritage.*

Achieving the above liveability priorities is assisted by the creation of a new public space bringing people together, fostering social interaction amongst local residents and providing a space for community activities. Additional housing supply is also delivered the proposal, including a variety of apartment sizes to meet housing needs. Furthermore, the proposal will enable the comprehensive renewal of the site and act as a catalyst for the broader renewal and revitalisation of the Ramsgate town centre.

The future built form on the site can also be designed to respect the local heritage buildings on the corner of Ramsgate Road and Rocky Point Road.

2.3.3 George River Council's Commercial Centres Strategy - Draft

George River Council's Commercial Centres Strategy (draft) guides the planning and development of commercial centres by determining a hierarchy, identifying the economic role and function of individual centres and providing guidance on appropriate land uses. The Centres Strategy is in two parts: the first part provides an overview of current trends for the commercial centres within Georges River Council and develops a centres hierarchy based on the current commercial role and development capacity of each centre. The second part of the Strategy highlights a number of issues with the existing centres planning framework and seeks to inform preparation of LEP 2020 and the accompanying DCP.

Under the Centres Strategy, Ramsgate is identified as a 'Village' in the hierarchy. This is based upon the centres classification system adopted by the report which considers the commercial and retail capacity of the centre and the size of the population it can support. As such, the Strategy (draft) adopts a hierarchy classification for the Ramsgate town centre which is of a lower role and function to that identified in the District Plan and Council's draft LSPS.

However, the Strategy (draft) acknowledges that Ramsgate is a suitable location to provide employment growth above that of other Village centres. This implies an ability to operate at a higher level in the hierarchy in the future, such as through approval of the Planning Proposal.

An important observation of the Centres Strategy is the role and function of supermarkets. The report notes that medium-sized to full line supermarkets are increasingly anchoring smaller centres. This would imply that if Council seek to improve Ramsgate's economic role and function as a commercial centre, a supermarket of appropriate scale is required.

An audit of centres designated under the Centres Strategy (draft) as either 'Local Centre' or 'Village' identifies that most of these commercial centres contain a supermarket. As illustrated **Table 1** below, for Ramsgate to operate in functional terms as a Local Centre, the provision of a supermarket is appropriate.

Table 1 Selected Local and Village Centres - Presence of a Supermarket

Local Centre	Centres Strategy Designation	Supermarkets
Beverly Hills	Local Centre	IGA (600sqm)
Kingsgrove	Local Centre	Woolworths (3,000 sqm)
Mortdale	Local Centre	IGA (1,100 sqm)
Oatley (Mulgoa Road)	Local Centre	Coles(2,100sqm)
Penshurst (Penshurst Street)	Local Centre	IGA (800 sqm)
Riverwood (Belmore Road)	Local Centre	Woolworths (3,050 sqm); ALDI (1,400 sqm)
South Hurstville (Kings Georges Road)	Local Centre	Llyods Supa IGA (2,500 sqm)
Hurstville East (Forest Road)	Village	-
Narwee (broad Arrow Road)	Village	-
Oatley (Oatley Avenue/Frederick Street)	Village	IGA (650 sqm)
Peakhurst (Forest Road)	Village	IGA (600 sqm)
Ramsgate (Rocky Point Road)	Village	-

Source: published sources

Note: medium to full line supermarket

The Planning Proposal is consistent with the recommendations of the Strategy (draft) which notes that:

- Council should “consider opportunities for neighbourhood supermarkets in appropriate locations in accordance with the existing and futures centres hierarchy”, and
- B2 Local centres, such as Ramsgate, should allow for neighbourhood supermarkets.

Further, Ramsgate is identified as a centre which is expected by the Strategy (draft) to undergo investment and growth in employment floorspace higher than for other comparable centres in the hierarchy. In part, this is due to the economic need for additional supermarket facilities in the area as identified further in Section 4.5 of this report.

2.3.4 Ramsgate DCP - 2013

The Ramsgate Centre Masterplan under the 2013 Development Control Plan includes a vision for Ramsgate's economic role and function. Overall, the Planning Proposal is consistent with this vision by enhancing intersection of Ramsgate Road and Rocky Point Road as the higher intensity precinct which operates as a true 'centre' in terms of built form, and the availability of retail and commercial functions.

The Ramsgate Centre masterplan identifies that Ramsgate has undergone significant change over the last three decades. Previously the role and function was limited to that of a small strip shopping centre. However, now Ramsgate has become a centre that provides a wider variety of services for both the local community and others visiting the area.

In this context, the Planning Proposal represents a natural 'next step' in the growth and evolution of Ramsgate by delivering a full line supermarket, a range of new high quality retail offerings and medical services. This is achieved in a manner consistent with both local and metropolitan strategic land use policies.

3.0 Community and Economic Profile

This Chapter of the report assesses the current socio-economic profile of the community living in proximity to the Subject Site and compares this with relevant benchmarks. An overview of current economic and social trends relevant to the proposed development is also provided.

In undertaking this assessment, we have identified a **Primary Study Area (PSA)** which represents the immediate community surrounding the Site as represented by the combined Kogarah Bay - Carlton – Allawah, Sans Souci – Ramsgate, and Kogarah Statistical Area 2 (SA2) ABS definitions (see **Figure 3**).



Figure 3 Primary Study Area - Kogarah Bay - Carlton – Allawah, Sans Souci – Ramsgate, and Kogarah Statistical Area 2 (SA2)

Source: Remplan.com.au

Although not all of the PSA is likely to experience impacts associated with the construction and operation of the proposed development, in an overall sense this area is relevant in terms of understanding the socio-economic context. The PSA has been benchmarked against:

- The Georges River Council (Georges River), and
- Sydney Greater Capital City Statistical Area (Greater Sydney).

Changes to the economic and social environment generated by the proposed development will be most significant in the PSA and are the focus of this report, although in an overall sense, economic and social outcomes will also be generated across the Georges River LGA and wider metropolitan area.

3.1 Existing Community and Economic Profile

The results of the 2016 ABS Census of Population and Housing have been used to identify key socio-economic and demographic characteristics of the community. Refer to **Appendix A** for a detailed breakdown of the socio-economic characteristics of each study area.

Key findings of the analysis are as follows:

Population and Age Structure

- Between 2011 and 2016, the number of residents in the PSA increased by approximately 4,004 residents to 43,256 residents in 2016, or an average annual growth rate of 2.0%. This growth rate is slightly above that of the Georges River at 1.7%, and comparable to the average annual growth rate of Greater Sydney at 1.9% over the same period.
- The population of the PSA is marginally older than relevant benchmarks. As at the 2016 census, the median age of the PSA was 38 years, this was slightly above the median age of Georges River at 37 and Greater Sydney with a median age of 36 years.
- Despite a relatively older median age, the largest age cohort was persons aged 20 to 34 which comprises around 23.4% of residents. The size of this group is broadly consistent with both Georges River and Greater Sydney. In the PSA, the next largest age group was persons aged 19 years and younger (21.8%) and persons aged 34 to 49 (21.1%). Overall, the age distribution across age groups is broadly similar to both Georges River and Greater Sydney, suggesting that the area is a relatively well established urban environment.

Dwellings and Tenure

- As at the 2016 census, there were around 15,674 occupied dwellings in the PSA. A little under half of these dwellings were flats, units or apartments (45.5%) followed by detached dwellings (39.6%). By this account, the Planning Proposal is consistent with the general dwelling characteristics of the area.

Household Composition

- In the PSA, 71.1% of households are family households. This is slightly lower than the proportion of family households in the Georges River (76.3%) and Greater Sydney (73.6%). Of these family households in the PSA, over a third were couple family with children, and a quarter were couple family with no children. These results are broadly in line with both Georges River and Greater Sydney.

Education

- Around 28.5% of residents in the PSA have obtained a bachelor's degree or above. This is comparable to the proportion of residents in both Georges River (30.2%) and Greater Sydney (28.3%).

Occupation and Employment

- In the PSA, 72.5% of residents were employed in white collar occupations. This is broadly comparable to the proportion of residents in both Georges River (73.1%) and Greater Sydney (73.2%).
- In the PSA, the top three industries by share of employment by local residents are as follows: Health Care and Social Assistance (13.8%), Retail Trade (10.2%), Professional, Scientific and Technical Services Industry (8.6%).

Working Population Profile

- As at the 2016 census, a total of 16,019 jobs were located in the PSA. A significant concentration of jobs was in the Health Care and Social Assistance industry, which accounted for almost 40% of all jobs in the area. This was followed by 10.8% of jobs in the Financial and Insurance Services industry.

Summary

In summary, the socio-economic profile of the PSA is characterised as having a fairly broad demographic profile with no particular group or demographic characteristics standing out as being unique to the area.

This means is that it is important that this broad demographic base is provided a relatively contemporary range of retail, commercial and housing choices. The Planning Proposal delivers this outcome through delivering enhanced supermarket facilities, critical in meeting basic day-to-day grocery requirements, as well as retail shops, medical and child care services. Furthermore, the proposed public space will be used for a range of community needs while fostering social interaction and community engagement.

3.2 Future Community and Economic Profile

The population of the PSA is projected to increase from 43,253 residents in 2016 to 51,222 residents by 2036, a total increase of approximately 8,167 residents at an average annual growth rate of 0.8% (see **Table 2**). This is a more modest growth rate than recent trends and is much lower than the average annual growth rate for both Georges River (1.1%) and Greater Sydney (1.5%) according to State Government projections.

Given the PSA's historical growth rate of 2.0% between 2011 and 2016, it's likely that this forecast is conservative and that the actual growth rate between 2016 to 2036 will be higher than the projected level.

Importantly, approximately 57% of the total population growth is expected to be in the working age cohorts between 20 and 64 years of age. This highlights the importance of generating localised employment opportunities, such as through delivery of the Planning Proposal.

Table 2 Population and Age Projections – 2016 to 2036

Age Group	PSA	Sydney LGA	Greater Sydney	PSA	Sydney LGA	Greater Sydney
	2016			2036		
0 to 19	9,438	33,521	1,188,663	11,024	41,935	1,600,407
20 to 34	10,127	35,625	1,115,138	10,249	38,527	1,332,580
35 to 49	9,113	28,743	1,017,802	10,203	34,606	1,325,447
50 to 64	7,539	26,418	829,827	9,027	32,504	1,115,373
65 to 80	4,949	15,566	490,553	7,047	23,513	792,703
80+	2,087	6,960	181,470	3,671	12,098	393,608
Total	43,253	146,833	4,823,453	51,222	183,183	6,560,118
Age Group	Population Change (2016 to 2036)			AAGR (%)		
0 to 19	1,586	8,414	411,744	0.8%	1.1%	1.5%
20 to 34	122	2,902	217,442	0.1%	0.4%	0.9%
35 to 49	1,090	5,863	307,645	0.6%	0.9%	1.3%
50 to 64	1,488	6,086	285,546	0.9%	1.0%	1.5%
65 to 80	2,098	7,947	302,150	1.8%	2.1%	2.4%
80+	1,584	5,138	212,138	2.9%	2.8%	3.9%
Total	7,969	36,350	1,736,665	0.8%	1.1%	1.5%

Source: Ethos Urban; Transport for NSW (2017)

Note: table totals are aggregated from age groups and may not necessarily equal actual totals.

Between 2016 and 2036, the total number of jobs within the PSA is projected to increase by 5,596 positions at an average annual growth rate of 1.5%. Within the Georges River, the number of jobs is projected to grow at an average annual growth rate of 1.1%, and by 1.6% in Greater Sydney.

Significant new development in the PSA will be required if it is to achieve the forecast resident and worker growth rates. The Planning Proposal and the associated indicative development concept has a key role to play in delivering this anticipated growth, particularly in the context of a relatively established urban area with limited sites able to accommodate significant change.

4.0 Social and Economic Benefits

The following section examines the social and economic benefits of the proposed development.

4.1 Employment

Jobs supported by the proposed development will accrue through direct and indirect employment generated during the construction phase; and ongoing employment during the operation phase.

4.1.1 Construction Phase

Direct employment in the *construction industry* is expressed as FTE job years. A 'job year' is a full-time job for one year.

Indirect or flow on employment will also be supported in other industries, for example, suppliers of materials and financial and legal services. Employment estimates in the wider economy are derived from ABS national accounts input-output analysis, specifically, employment multipliers.

Direct employment in the construction industry depends on the nature of the building, in particular, the capital intensity of the project.

It is estimated 1.96 FTE direct construction industry job years per \$1 million of expenditure (or 1.0 FTE job year per \$510,000) will be generated by the construction activity, based on research and the type of work expected to be undertaken in the construction phase of the site.

In addition, these direct construction industry jobs lead to demand for employment in supplier industries in the wider economy. The ABS construction multiplier is 2.6 - that is, for every single FTE job in the construction industry a further 1.6 FTE jobs are supported elsewhere in the economy.

Direct construction costs are estimated to be approximately \$100 million. Which includes all construction related expenses such as allowance for demolitions, and construction of residential, retail and commercial premises and excludes contingencies.

Total construction costs of \$100 million would support 195 FTE job years *in the construction industry* and support a further 315 FTE job years *in related (supplier) industries* over the development period. This equates to a total of around 510 FTE job years being created directly or indirectly during construction. This is highlighted in Table 3 below.

Table 3 Estimated Construction Phase Job Years

Job Type	Estimated FTE Job Years
Direct	195
Indirect	315
Total	510

Source: Ethos Urban

It is assumed that construction will take a total of around 3 years and would support an average of 65.4 direct and 104.6 indirect FTE jobs for each year of the development phase.

Local businesses, workers and jobseekers are likely to benefit from increased employment and contracts afforded by the construction phase of the project.

4.1.2 Operations Phase

During the operations phase, it is expected that the indicative design concept would generate approximately 233 jobs based on application of industry benchmarks (see **Table 4**). The majority of these jobs would be within the

Accommodation and Food Services industry, while medical jobs would primarily be in the Health Care and Social Assistance industry. The jobs available at the site would be well suited for a range of age groups while also providing a range of employment types: casual, part-time and full-time.

Furthermore, retail jobs are highly suitable for younger residents in the area and persons seeking more flexible working arrangements, including persons studying and for whom a casual retail position is important in achieving financial stability.

Table 4 Estimated Retail and Medical Related Jobs

Job Format	GFA (sqm)	Estimated Jobs
Retail	2,140	86 Retail Jobs
Coles	2,860	143 Retail Jobs
Medical Suites	130	4 Medical related Jobs
Total	5,000	233 Estimated Jobs

Source: Ethos Urban

Note: Retail is based on a floor space ratio assumption of 1 job per 25 sqm, while the assumption for Coles, is 1 job per 20 sqm. An assumption of 1 job per 30 sqm has been applied for the medical suites; however, given the relatively small GFA, the estimated jobs results are not very sensitive to varying this assumption. Total number of child care jobs will depend upon the age of children attending the child care and the design of the child care facility. The figure provides is a minimum number of jobs that are expected to locate at the site.

Overall, redevelopment of the site consistent with the indicative development concept is expected to provide a range of job opportunities for the local worker market. This will be particularly beneficial for local residents who have a preference to work close to home.

4.2 Increased Local Expenditure

The additional workers located at the Subject Site will also increase retail expenditure available in the local area. This local retail expenditure is expected to be directed toward food-related purchases such as take-away, cafés, restaurant dining and take-home groceries.

Assuming that the 233 workers spend an average of \$12 per working day on local food and beverages, this would result in an increase in annual spending on local businesses of \$700,000 per annum. Spread across a number of traders, this will help support overall trading viability and profitability for businesses at, and surrounding, the Subject Site.

The remainder of workforce expenditure is dedicated to spending on retail goods, such as clothing and accessories, entertainment, leisure activities and personal services. As a result, the trading conditions of retailers near the proposed development will likely improve. This will be to the benefit of the retail environment surrounding the site. The level of spending by workers on these non-food categories is more difficult to specifically forecast. However, local non-food businesses are expected to experience a positive impact on sales associated with exposure to a larger local workforce population.

4.3 Increased Expenditure from Residents

There will be an increase in local expenditure on retail goods and services as a result of additional population growth supported by the proposed development.

Spending per capita on retail by residents within the area is approximately \$13,302 each year. This includes spending on food, liquor and groceries, food catering, non-food items and services. Approximately 60% of this expenditure is on product categories suited to local retail spending. This implies around \$7,981 will be spent each year on local retail goods and services per resident.

Based on the current indicative development concept, around 410 residents are expected to occupy the site. Overall, these residents are expected to spend approximately \$3,272,353 per year on local retail goods and services (see **Table 5**). This is an increase above the current level of expenditure within the area and is expected to improve the future viability of retail within the Ramsgate centre, and encourage further investment in new retail surrounding the site.

Table 5 Increased Retail Expenditure from Residents

Metric	Value
Expected Number of New Residents	410 ^a
Per Capita Expenditure on Local Retail per Annum	\$7,980
Increase in Expenditure on Local Retail per Annum	\$3.272 million

Source: Ethos Urban

Notes: a. This is calculated on current occupancy rates for the PSA for each bedroom type.

Overall, the increase in expenditure from residents will be a direct benefit to the local area and will further improve the viability of retail within the area.

4.4 Creating a Local Centre

A significant benefit of the Planning Proposal is that it will help establish the vision of Ramsgate as a local centre.¹ It will achieve this through the provision of a new high quality public square, improved amenity and walkability, and providing a range of goods and services: full line supermarket, improved retail experience and medical services.

The importance of local centres for the local community is recognised by the Greater Sydney Commission, which states:

'Local centres are important for access to day-to-day goods and services. These centres create a strong sense of place within the local community. Local centres are collections of shops and health, civic or commercial services. Larger local centres, such as those anchored by a supermarket, can form the focus of a neighbourhood. Supermarket-based centres also provide local employment, accounting for close to 18 per cent of all Greater Sydney's jobs. While local centres are diverse and vary in size (as measured by floor space), they play an important role in providing access to goods and services close to where people live. Increasing the level of residential development within walking distance of centres with a supermarket is a desirable liveability outcome.' (Greater Sydney Regional Plan, 2018, p. 120).

4.5 Addressing the current gap in supermarket provision in the area

A high-level assessment of supermarket provision within the local area has been undertaken to determine the opportunity for a full-line supermarket to meet local demand.

An investigation area is illustrated in Figure 4 which provides a general indication of the local market for supermarket facilities. In 2018, the estimated residential population of this investigation area is approximately 26,060 persons.

The approximate size the two supermarkets within the investigation area is shown in Table 6. Taken together, both supermarkets comprise 5,000 sqm of floorspace.

Table 6 Supermarkets within the Investigation Area

Supermarket	Approximate Size
Supabarn Sans Souci	2,800 sqm
Coles Ramsgate	2,200 sqm
Total	5,000 sqm

Source: Google Maps;

¹ There is a discrepancy with identifying the location of Ramsgate under the Greater Sydney Regional Plan 2018 and district plans. As argued in the planning report, the site is deemed to be the more appropriate location for the Ramsgate local centre.



Figure 4 Investigation Area

Source: Ethos Urban; Bing

Currently the rate of supermarket floorspace provision in the investigation area is low at approximately 190 sqm per 1,000 persons compared to the Sydney average of 260 sqm per 1,000 persons. Upon completion of the supermarket on the site, an additional 2,860 sqm of supermarket floorspace will be added to the investigation area. This would increase supermarket floorspace provision to be at around 302 sqm per 1,000 persons which is still well below the national average (330 sqm per 1,000 people), although marginally higher than the Sydney average which is impacted by a lack of available supermarket sites.

Based on the above, it is evident that a gap exists in the provision of a supermarkets within the local area and that local residents are under-serviced relative to contemporary expectations. The closest supermarket to the site is at Ramsgate Beach; however, this supermarket is not a full line supermarket and as such does not provide the full-range of goods and services provided at a full line supermarket as proposed for the Subject Site.

Provision of a full-line supermarket as part of the Planning Proposal will help address this current gap in retail facilities, and enhance the liveability of the local area.

4.6 Catalyst to Revitalising the Area

The Planning Proposal is expected to be a catalyst for further revitalisation of Ramsgate local centre and the broader area. The site is the largest consolidated site within Ramsgate local centre and will deliver a significant quantum of new high-quality development accompanied by a range of public benefits. A development of the scale, quantum and quality proposed will result in permanent regenerative benefits to the local area, and in doing so will stimulate further investment into the centre. This will include further redevelopment and/or refurbishment of sites in the Ramsgate centre.

4.7 Improving the Retail Experience and the Viability of Existing Retail

Currently, the retail environment is primarily along Rocky Point road. A significant share of buildings and shops along this strip have become relatively dated and the overall retail experience has become tired, with local businesses relatively worse off than other local centres.

This is partly due to the locality lacking a sense of identity and critical mass sufficient to associate the area as a preferred destination for retail and local services. In addition, the proximity to Rocky Point Road and general dated façade along the strip means that the overall retail experience is quite poor.

The Planning Proposal will significantly improve the retail experience and viability of existing retail at the centre. It will achieve this by delivering new high quality retail fronting Rocky Point Road and the internalised public space, delivering a new full line supermarket that will anchor the centre, improving local amenity, and providing a sizeable public space and laneways that will significantly improve the functionality and attraction of the centre. These latter design elements are important as they provide pedestrians with refuge and an escape from the noise of Rocky Point road.

The provision of a full line supermarket is expected to act as an anchor for other retail, while a new basement car park will provide ample parking for visitors to the centre. Medical suites, a community space and a new child care centre are also expected to draw in residents to the site. New and existing retail also be supported by the increase in local expenditure resulting from increased residents and jobs at the site. Taken together, it is expected that the locality will experience increases in levels of activity and visitation, which will have a positive influence on achievable sales for other businesses.

4.8 Providing Parking that can Support the Wider Ramsgate Local Centre

At present Ramsgate local centre is underserviced by public parking. Should the site be redeveloped in accordance with the indicative development concept then this will include a new large basement car park of some 286 spaces. A secure undercover car park located centrally within Ramsgate will greatly improve the centre's convenience and accessibility, and thereby encourage increased foot traffic and business, much to the benefit of all businesses within the broader centre.

4.9 Other Benefits

A number of additional benefits that are expected to be provided are discussed below:

- **Provide additional services to the local population.** The Planning Proposal will assist in providing additional services to the local population including medical facilities, a space for a community use/hall centre.

- **New business opportunities.** The Planning Proposal is expected to improve the local economy, this will provide new opportunities for businesses to locate in the area. It is expected that such businesses will be primarily retail and provide goods and services to the local area.
- **Medical services.** The Planning Proposal has dedicated part of its GFA to the provision of medical suites. The inclusion of GFA dedicated to medical suites has a number of potential benefits for the local area:
 - Health services are significantly lacking across the area;
 - As retail and health services are symbiotic, there will be less of an increase in demand for car parking (they will create a modestly longer stay, and ample walk-in by residents);
 - The availability of medical support services will have a direct positive impact on community well-being.
 - In recent years, the Health Care and Social Assistance industry has been an important source of employment growth;
- **Catalyst for revitalisation.** Redevelopment of the site in accordance with the indicative development concept will significantly improve the vitality and viability of the centre. This will in turn promote an improved quality of retail offering at the centre and support an enhanced amenity and pedestrian experience.
- **Improved street activation and greater pedestrian access.** The proposed development seeks to maximise permeability and connectivity across the ground plane. This will greatly improve street activation throughout the day and improve pedestrian access to the site, and in turn improve public surveillance around the site and discourage antisocial behaviour.
- **Employment opportunities for younger residents.** The dedicated commercial GFA of the proposed development means that the site can provide a range of businesses and job opportunities. It is expected that the site will provide retail services the local population and workers. In this dynamic environment, a range of working conditions, and job types will be provided.
- **A more efficient and productive use of land.** The current occupied with ground floor retail tenancies, a car park and several residential dwellings of between one to two storeys. The Planning Proposal will make more efficient and productive use of this land by increasing the intensity of use of land at the site. Such intensity is consistent with the planning policy and strategic planning objectives.
- **Opportunities for older residents.** The colocation of residential apartments, retail shops and medical facilities will allow older residents to have access to services without the use of private or public transport. This will provide an opportunity for older residents to maintain their independence

5.0 Conclusion

This analysis has found that the indicative development concept that accompanies the Planning Proposal will have provide a number of social and economic benefits through both its construction phase and operation phase. The key findings are as follows:

- The most significant benefit of the Planning Proposal is that it will help to establish the vision of Ramsgate as a local centre. The Planning Proposal is expected to be a catalyst for the revitalisation of the area that delivers the scale and mix of uses which reflects a true local centre role and function.
- Redevelopment of the site consistent with the indicative development concept is expected to provide a range of job opportunities for local workers. This will be particularly beneficial for local residents who have a preference to work close to home. It is expected that at conclusion of the project approximately 233 jobs will be located on the site.
- It is expected that around 510 job years will be created during the construction phase of the project.
- An increase in expenditure on local retail of \$3.27 million per year is expected to occur as a result of the new development. Around 410 new residents are expected to live in the new development with an expenditure on local retail estimated to be \$7,980 per resident each year.
- An increase in the availability of goods and services for local residents will be achieved through the provision of a full line supermarket, increase in retail GFA, and through enhancing retail improving and viability of existing retail.
- A secure undercover car park located centrally within Ramsgate will greatly improve the centre's convenience and accessibility, and thereby encourage increased foot traffic and business, much to the benefit of all businesses within the broader centre.
- The provision of a supermarket at the site in conjunction with residential apartments will help improve the liveability of the site and surrounding area by providing a full line supermarket within walking distance.
- The availability of medical support services will have a direct positive impact on community well-being. In addition, as retail and health services are symbiotic, there will be less of an increase in demand for car parking.
- There will be new business opportunities that will arise due to the expected improvement to the local economy.
- Overall, the redevelopment of the site consistent with the indicative development concept is expected to improve the general wellbeing of the local community.
- The redevelopment of the site consistent with the indicative development concept is consistent with and will assist in the objectives of strategic planning policy documents for the area.
- The indicative development concept will provide an opportunity for older residents to locate at the site while having access to a range of essential services. This will be suitable for older residents who wish to maintain independence as they age.

Appendix A. Demographics Data

Table 7 Usual Residence Statistics

	PSA	Georges River	Greater Sydney Statistical Area
Demographics (2016)			
Population	43,253	146,833	4,823,453
% of population aged 19 years and younger	21.8 %	22.8 %	24.6 %
% of population aged between 20 to 34	23.4 %	24.3 %	23.1 %
% of population aged between 34 to 49	21.1 %	19.6 %	21.1 %
% of population aged between 50 to 64	17.4 %	18. %	17.2 %
% of population aged between 65 to 79	11.4 %	10.6 %	10.2 %
% of population aged 80 and over	4.8 %	4.7 %	3.8 %
Median age	38	37	36
Cultural Diversity (2016)			
% of residents born in Australia	49.7 %	49.7 %	57.1 %
% of residents who speak English well or very well	44. %	42.3 %	29.3 %
% of population living at the same address as one year ago	77.1 %	78.5 %	76.6 %
% of population living at the same address as five years ago	54.1 %	56.1 %	53.2 %
% of residents overseas one year ago	3.1 %	3.3 %	2.5 %
% of residents overseas five years ago	10.7 %	11.5 %	8.9 %
Ancestry (2016)			
Most common ancestry	Chinese (14.43 %)	Chinese (22.76 %)	English (19.43 %)
Second most common ancestry	English (9.80 %)	English (13.33 %)	Australian (18.06 %)
Third most common ancestry	Australian (9.80 %)	Australian (12.64 %)	Chinese (7.77 %)
Fourth most common ancestry	Greek (6.34 %)	Greek (6.04 %)	Irish (6.64 %)
Fifth most common ancestry	Nepalese (5.50 %)	Irish (4.85 %)	Scottish (4.90 %)
Languages (2016)			
Most common language spoken	English (42.38%)	English (42.33%)	English (58.39%)
Second most common language spoken	Greek (9.45%)	Mandarin (14.35%)	Mandarin (4.75%)
Third most common language spoken	Mandarin (7.69%)	Cantonese (9.90%)	Arabic (4.02%)
Fourth most common language spoken	Cantonese (4.78%)	Greek (5.36%)	Cantonese (2.88%)
Fifth most common language spoken	Arabic (4.01%)	Arabic (3.57%)	Vietnamese (2.06%)
Sixth most common language spoken	Nepali (3.86%)	Nepali (3.40%)	Greek (1.58%)

Families (2016)

Number of occupied dwellings	15,674	48,673	1,623,874
%People in family households	71.1 %	76.3 %	73.6 %
%People in group households	4.6 %	4.5 %	4.7 %
%People as lone persons	24.3 %	19.2 %	21.6 %

Dwellings (2016)

% as detached houses	39.6 %	53.8 %	56.9 %
% as semidetached houses	14. %	11.7 %	14. %
% as flats, units or apartments	45.5 %	33.6 %	28.1 %
% of dwellings owned outright	32.9 %	34.3 %	29.1 %
% of dwellings being purchased	27.9 %	30.9 %	33.2 %
% of dwellings being rented	35.9 %	31.8 %	34.1 %
Average house loan repayment (\$/month)	\$1,931.40	\$1,950.01	\$2,009.27
Average household rent (\$/week)	\$457.43	\$446.83	\$462.28
Average household income (\$/week)	\$1,863.45	\$1,958.96	\$2,074.85
Average no. of persons per household	2.6	2.9	2.78

Education (2016)

% of residents with a bachelor's degree or above	28.5 %	30.2 %	28.3 %
% of residents with diploma or advanced diploma	10.4 %	9.7 %	9.3 %
% of residents with certificate III & IV	11.2 %	10.1 %	12.1 %

Employment (2016)

Employed	21,169	69,535	2,272,727
Unemployment rate	5.9 %	6.5 %	6.0 %
Labour force participation rate	62.4 %	60.9 %	61.6 %
% employed in white collar occupations	72.5 %	73.1 %	73.2 %
% employed in blue collar occupations	25.7 %	24.9 %	24.8 %

Industry of Employment (2016)

% of agriculture, forestry and fishing workers	.1 %	.2 %	.4 %
% of mining workers	.1 %	.1 %	.2 %
% of manufacturing workers	4.5 %	5.0 %	5.8 %
% of electricity, gas, water and waste services workers	.5 %	.6 %	.8 %
% of construction workers	7.2 %	7.1 %	8.2 %
% of wholesale trade workers	3.3 %	3.5 %	3.6 %

% of retail trade workers	10.2 %	10.1 %	9.3 %
% of accommodation and food services workers	8.2 %	8.5 %	6.7 %
% of transport, postal and warehousing workers	8.2 %	6.3 %	5.0 %
% of information, media, and telecommunications workers	2.1 %	2.2 %	2.8 %
% of financial and insurance services workers	6.1 %	6.8 %	6.4 %
% of rental, hiring, and real estate services workers	2.1 %	2.1 %	1.9 %
% of professional, scientific, and technical services workers	8.6 %	9.3 %	9.8 %
% of administrative and support services workers	4.1 %	3.9 %	3.6 %
% of public administration and safety workers	4.8 %	4.8 %	5.5 %
% of education and training workers	6.1 %	7.3 %	8.0 %
% of health care and social assistance workers	13.8 %	12.1 %	11.6 %
% of arts and recreation services workers	1.4 %	1.5 %	1.7 %
% other services	3.6 %	3.4 %	3.6 %

Source: ABS (2016); Ethos Urban

Table 8 Place of Work Statistics

	PSA	Georges River	Greater Sydney Statistical Area
Employment (2016)			
Employed	16,019	42,550	2,209,296
% employed in white collar occupations	81.1 %	76.6 %	74.8 %
% employed in blue collar occupations	17.3 %	21.6 %	23.3 %
Industry of Employment (2016)			
% of agriculture, forestry and fishing workers	0.0%	0.1%	0.4%
% of mining workers	0.0%	0.0%	0.2%
% of manufacturing workers	1.6%	3.8%	5.9%
% of electricity, gas, water and waste services workers	0.2%	1.0%	0.8%
% of construction workers	5.1%	6.8%	6.9%
% of wholesale trade workers	1.0%	2.6%	3.7%
% of retail trade workers	5.4%	9.2%	9.5%
% of accommodation and food services workers	6.2%	6.9%	6.8%
% of transport, postal and warehousing workers	1.2%	2.3%	5.0%
% of information, media, and telecommunications workers	0.5%	0.8%	2.8%
% of financial and insurance services workers	10.8%	7.3%	6.6%
% of rental, hiring, and real estate services workers	1.7%	2.3%	2.0%
% of professional, scientific, and technical services workers	5.9%	6.8%	10.1%
% of administrative and support services workers	2.3%	2.8%	3.3%
% of public administration and safety workers	3.9%	4.8%	5.7%
% of education and training workers	6.7%	8.8%	8.2%
% of health care and social assistance workers	39.5%	23.7%	11.7%
% of arts and recreation services workers	1.0%	1.2%	1.7%
% other services	3.2%	4.1%	3.5%

Source: ABS (2016); Ethos Urban