



Economic Impact Assessment
Casuarina Beach Town Centre
Prepared For: **Kings Beach (No2) Pty Ltd**

15 February 2008
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Executive Summary

History

The Tweed Coast is evolving from a series of isolated villages with a population of 14,000 people in 1996 to a series of new and expanded villages with a strong focus on tourism. By 2026 the population is expected to be 46,000, this represents an average annual growth of over 1,000 new residents per year. This increase in population will change the way in which services (including retail) are delivered to the community.

Conics (formally Core Economics) were commissioned by Tweed Shire Council to produce the 2005 Retail Strategy as the rate and extent of change had rendered earlier centres planning studies obsolete.

Proposal

The purpose of this report is to assess the social and economic impact of the proposed town centre to be developed at Casuarina Beach. This centre will be a 'Main Street' mixed use precinct focused on a 350m long road extending from the Tweed Coast Road to a series of beach access points. The land use plan is included as Appendix C. This report will focus on the retail components of the Town Centre.

Concept Plan – a mixed use main street consisting of retail, commercial, residential and other uses. The retail GFA will not exceed 5,660 Sq M defined as follows:

- Lot 1 – a retail site to be occupied by a supermarket anchored shopping centre with a maximum 3,660 Sq M of GFA (with a 2,500 Sq M Coles as the anchor).
- Lots 2, 5, 6, 12 and 13 – a series of mixed use sites extending along the main road from the supermarket to the beach.
- Lot 17 – a mixed use site proximate to the beach. This site will contain a series of food and beverage outlets and host an 'Icon' piece of architecture/building.
- The retail GFA in lots 2,5,6,12,13 and 17 will not exceed 2,000 Sq M GFA.

The expansion of the supermarket anchored shopping centre (with a possible 3,500 Sq M Coles supermarket and additional specialty stores) will be the subject of a future application. This expansion will occur in-line with consumer demand and a new economic statement will be prepared. A larger supermarket may be triggered by an increasing catchment population and/or increased tourist patronage. This is likely to occur when the catchment population reaches 13,000 to 14,000 people but this will depend on the competitive retail environment at the time and contemporary retail trends and practice. This report will deal with the current application only.

- The Town Centre will have two distinct yet complementary 'personalities':
- As an everyday centre for local residents (including surrounding communities) to undertake chore (supermarket) shopping, impulse shopping, dining and other regular 'centre based' activities
- As a tourist centre servicing the needs of visitors to the area, this will include dining, tourist services and chore/impulse shopping

This mixed use precinct will include small scale retail and food/beverage that will be utilised by both the resident and tourist populations.

2009 is the estimated first full year of operation for the Stage 1 precinct and as such, 2011 is considered an appropriate year for benchmarking comparisons due to the time required to build the market and the desire of retailers to become established ahead of peak demand. Stage 2 is likely to occur some time after 2014, but this will be triggered by consumer demand and population growth.

The proposal will help build social and community relationships within the local area.

Current Retail Infrastructure

At present, the coastal portion of the Tweed Shire, which extends from Fingal Head in the north to the Shire border in the south and west to the Pacific Highway, is serviced by a single, full-line Woolworths supermarket at Kingscliff. Additional supermarkets are located external to the area in South Tweed, Tweed Heads, Murwillumbah and Ocean Shores.

The Tweed Retail Strategy, dated September 2005, anticipates the inclusion of additional supermarket anchored centres located in Pottsville Beach, Casuarina Beach / Salt Village and Kings Forest (as an emerging community).

The need for one, two or three additional supermarkets in this part of the Tweed Shire will be shaped by population growth, residential density and population capacity. The Casuarina Beach supermarket will be the first in this area of the Tweed Shire and will 'borrow' the catchments in and around Pottsville Beach until such time as similar facilities are developed locally. Without a supermarket in Casuarina the majority of residents of the PTA will undertake their supermarket shopping in Kingscliff and South Tweed.

Core Economics have been advised that Leda Developments do not wish to establish a full-line supermarket at Kings Forest, and similarly, the Ray Group do not intend to establish a full-line supermarket at Salt Village. This increases the importance of a supermarket anchored centre (with associated retail and food/beverage) at Casuarina Beach as this area will service the communities of Kings Forest, Seaside City, Salt, Casuarina Beach and Cabarita Beach / Bogangar. This outcome was anticipated by the Tweed Retail Strategy.

Service Catchment

The catchment of the centre will be primarily dependant upon the distribution of other similar facilities. As such, the Primary Trade Area (PTA) will include the communities of Kings Forest, Seaside City, Casuarina Beach, Salt and Cabarita Beach/Bogangar. The Casuarina Beach Town Centre will also service the communities of Hastings Point and Pottsville Beach until such time that a centre is established locally. The PTA will include full-time residents, part-time residents and tourists. The intended mix of the Casuarina Beach Town Centre and associated Main Street retail (including food/beverage, chore retail, retail services etc.) will cater to these groups.

Market Size

By 2011, the population of the PTA is expected to be in the order of 8,304 people, with a further 7,057 living in the Secondary Trade Area (STA). It is expected that the PTA will have a population of 14,397, people, and the STA will have a population of approximately 8,865 people in 2016.

By 2016 the population of the combined trade areas is estimated to have a total retail expenditure of \$205 million.

The south coastal area of Tweed Shire has need and demand for a supermarket anchored shopping centre now; increasing population will see demand for a second centre in 2011/2012. The two best locations for these centres (given anticipated population distribution and current trends) are Casuarina Beach and Pottsville. The sequencing of these centres will be dependant upon site availability and other site planning issues. The Casuarina Beach Town Centre will be the first in this area of the Tweed Shire and will 'borrow' the catchments in and around Pottsville Beach and Hastings Point until such time as a similar facility is developed in that area. Without a supermarket in Casuarina the majority of residents of the PTA will undertake their supermarket shopping in Kingscliff and South Tweed.

The proposed centre at Casuarina was anticipated by the Tweed Retail Strategy and the inclusions (full line supermarket) are in keeping with scale expected.

There is currently a need for a supermarket based shopping centre central and proximate to the residents of Casuarina Beach, Salt, Cabarita Beach and the future communities of Kings Forest and Seaside City. These people currently travel some distance from the local area for chore shopping needs which are primarily performed at higher-order centres.

In 2009 the Town Centre (with a 2,500 Sq M Coles and 1,160 Sq M of other retail) will cater to an estimated 33% of local convenience retail needs of local residents. This will expand in-line with the growing population and by 2011 the proposed 5,660 Sq M Casuarina Beach Town Centre (with a 2,500 Sq M Coles) will cater to approximately 35% to 40% of the local convenience retail demand. The proposed town centre will provide for the increasing retail needs of the growing local area resident and tourist population.

No significant negative impacts from the proposed development on the local retail facilities, other centres or the community are anticipated when the centre opens in 2009. The retailers at Kingscliff will likely see a reduction in turnover on 5% to 7% when compared to 2006 levels. The majority of this impact is expected to be restricted to the Woolworths supermarket as patronage is transferred to the Coles at Casuarina. Impacts on other centres will be largely offset by local growth in the areas surrounding these centres.

Centre Function

The Casuarina centre is a 350 M long street based precinct that is perpendicular to the beach. This will produce a walkable centre that will encourage maximum pedestrian activity. Centres of a similar walkable scale include Hastings Street in Noosa, the Corso in Manly and Marine Parade Kingscliff. The supermarket component will be one node within the street based centre. Other nodes and uses (leisure retail, tourist based retail, dining etc) are best located in proximity to the beach in order to maximise public benefit and enjoyment. This level of proximity and integration are hallmarks of street based centres and sustainable urban principles.

The planned layout will provide the best opportunity to create a viable centre for Casuarina with the utilitarian supermarket located furthest from the beach (and closest to the Tweed Coast Road) with the retail and commercial that will cater to a mix of patrons (residents, tourists, day-trippers) linking the supermarket to the beach.

The current coastal communities in Tweed Shire are small in scale and have limited retail services. A centre of the type proposed in Casuarina will help alleviate this considerable disadvantage. Without a full line supermarket local residents will be required to travel to larger centres in the northern part of the shire to undertake everyday shopping.

Tweed Retail Strategy

The Tweed Retail Strategy (prepared by Conics (formally Core Economics) in September 2005) identifies the need for supermarket anchored centres in the Tweed Coast based on future growth to cater to a localised catchment area.

In consideration of the Tweed Retail Strategy in November 2005 [at Council meeting 16 November 2005], the Tweed Shire Council had a number of resolutions. How the site 'fits' these resolutions is described as follows:

Item	Comment
The character of existing towns and villages and also retail facilities have to be protected;	The proposed centre will have a scale and function that does not threaten other centres and will reinforce the higher order functions of the higher order centres in Tweed Heads and South Tweed.
Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones;	The population growth in the Casuarina, Salt and Kings beach area is a clear instance where a new centre is required to support the population.
Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping;	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population with higher order shopping (department stores, discount department stores, large discount variety stores and concentrations of specialty stores) directed to the larger district centres including the major district centre of Tweed Heads South.
Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style;	The proposed centre will have a scale and function that does not threaten other centres.
Limit the scale of new large-scale retail centres in the coastal region to a level which caters for the majority of chore-type shopping needs. This concept is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking;	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population. Without a full line supermarket in the local area, residents will be required to drive between 7 and 17Km in order to conduct their regular weekly (chore) shopping. A long trip distance does not produce a social, environmental or economically sustainable outcome.
Council does not support the establishment of another district retail shopping centre.	<p>Tweed Shire is presently serviced by three district centres (Tweed Heads, South Tweed and Murwillumbah) with South Tweed being the largest (see resolution 3 above where South Tweed is described as the major district retail centre). The district centres host higher order shopping (department stores, discount department stores, large discount variety stores and concentrations of specialty stores).</p> <p>The issue of a district centre at Kingscliff was raised in the retail strategy and rejected by council.</p> <p>The proposed centre at Casuarina is not a district centre.</p>

A supermarket anchored centre at Casuarina is a local centre and is entirely consistent with the Tweed Retail Strategy and subsequent council resolutions.

Conclusion

The establishment of a supermarket anchored centre and mixed use Main Street precinct at Casuarina Beach is considered to be a good fit with the needs of the community and will service the areas of Kings Forest, Salt, Seaside City, Casuarina Beach and Cabarita Beach/Bogangar. Based on the current population of the PTA and STA, there is a requirement for the first stage of the Town Centre to be developed within the area now.

The inclusion of the mixed use Main Street, with a focus on small speciality retail and food/beverage is important as it will service the needs of the residents and tourists. The inclusion of appropriate cafes / restaurants is particularly important in attracting the tourist market to the town centre and in helping to build social interactivity within the local communities. Based on the social assessment, community sentiment is for more facilities to be provided other than just a supermarket, with community members preferring the idea of a "village centre" which will help with community building, as proposed by the development.

The Tweed Retail Strategy dated September 2005 anticipates the inclusion of supermarket anchored centres in Pottsville Beach, Casuarina Beach/Salt Village and Kings Forest (as an emerging community). The lack of a full-line supermarket anchored shopping centre at Kings Forest and Salt Village places greater importance on Casuarina Beach establishing this type of facility. Casuarina is considered the most appropriate location for the first supermarket as by 2008 the PTA contains the majority of the population. This will accelerate due to the further development in areas such as Salt and Casuarina.

The proposed centre is also supported by the local community with positive feedback provided by the public consultation.

There is also significant community need for such a facility given the distance to centres in Kingscliff (6-8Km) and South Tweed (14-16Km) and the opinions of the local community supporting the establishment of a supermarket anchored centre.

Introduction

INTRODUCTION

This report was commissioned by Kings Beach (No 2) Pty Ltd.

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- As a tourist centre servicing the needs of visitors to the area, this will include dining, tourist services and chore/impulse shopping

This Socio-Economic Impact Assessment (SEIA) will address the Retail Strategy prepared for Tweed Shire Council by Conics (formally Core Economics) in September 2005.

METHODOLOGY

The methodology for undertaking this Socio-Economic Impact Assessment (SEIA) included:

- A description and analysis of the existing economic and social environment
- Predicting the economic and social changes that may result from onsite development
- An assessment of the positive and negative impacts
- Peak body consultation with community and business sectors

This report takes an issues oriented assessment, which concentrates on the analysis of particular social and economic aspects considered to be most significant.

1.0 Site Assessment

1.1 INTRODUCTION

The characteristics of the site and surrounding land uses are assessed to determine the most relevant locational considerations for the proposed town centre.

1.2 SITE AND SURROUNDS

The subject site for the proposed Town Centre is located on the eastern side of the Tweed Coast Road at Casuarina Beach. It is proposed to extend from the Tweed Coast Road along a new road to a series of beach access points.

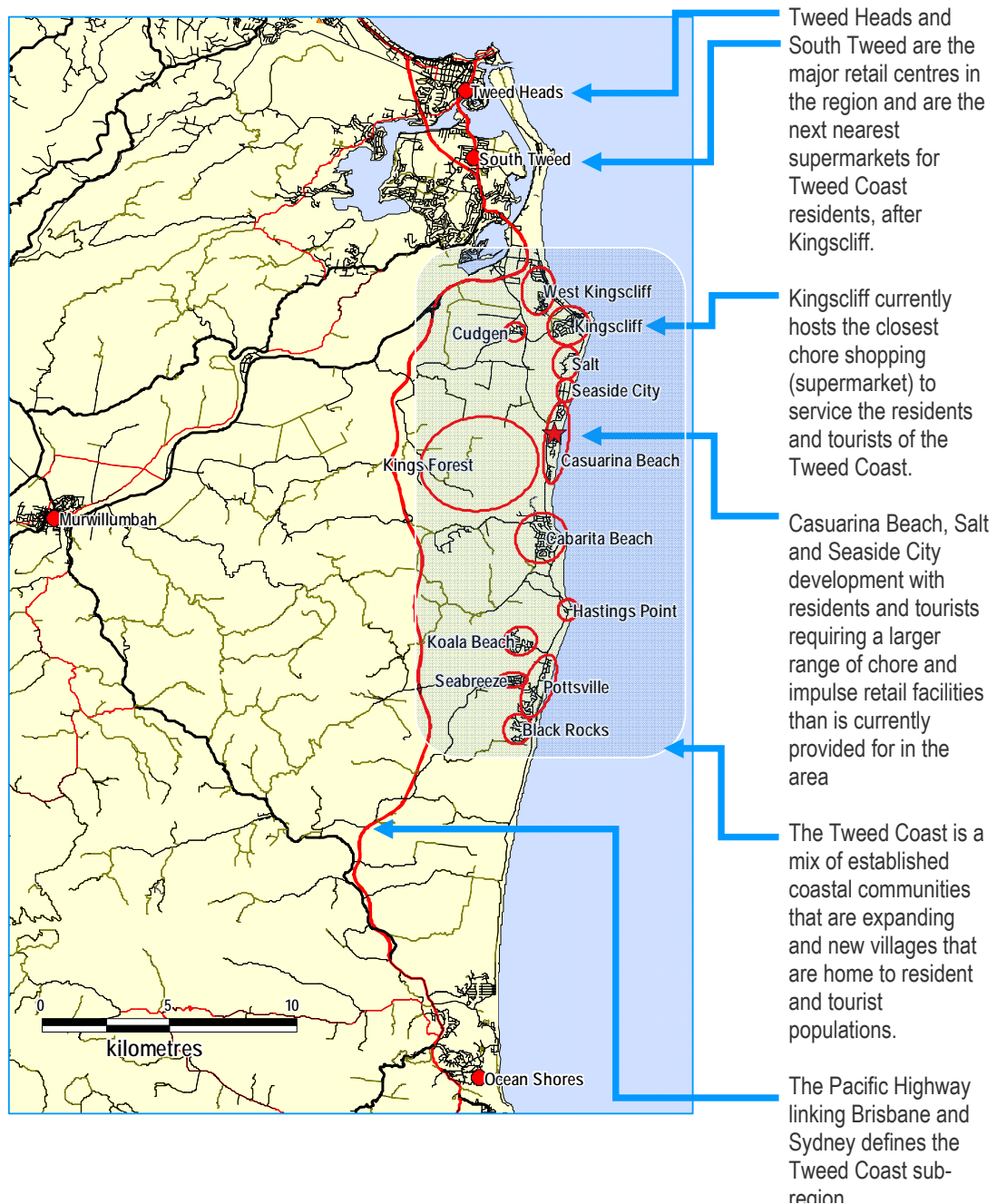
Tweed Coast Road is a main access road to and from Kingscliff and Tweed Heads for residents of Pottsville Beach, Hastings Point, Cabarita Beach / Bogangar, Casuarina Beach and Salt Village.

The surrounding land uses of the subject site include:

- Permanent and holiday residential homes at both Casuarina Beach and Salt Village
- To the north at Salt Village are the Peppers and Outrigger Resorts
- Salt Village includes some retail development (including a small convenience IGA supermarket, a tavern/bar and surf clothing shop), although these facilities are primarily targeted at the resort visitors rather than permanent residents
- The site is proximate to the future communities of Kings Forest and Seaside Village (under construction).

Figure 1.1 provides a visual perspective of the current surrounding land uses.

Figure 1.1 Site and Surrounding Land Uses



1.3 OBJECTIVES OF THE DEVELOPMENT

The objective of the proposed Town Centre is to create a main street precinct that will cater to the increasing social and economic needs as a result of population and dwelling growth (both resident and tourist) in parts of the Tweed Coast with a focus on Casuarina, Seaside City, Salt, Cabarita Beach and Kings Forest.

The local residents are presently required to travel to other areas of the shire in order to conduct chore (supermarket) shopping, convenience and speciality retail and related purchases. The nearest full line supermarket is located in Kingscliff (approx 7Km to the north) or South Tweed (approx 14Km to the north).

The proposed development will develop a mixed use town centre that will not exceed 5,660 Sq M and will include a 2,500 Sq M full-line supermarket (Coles), up to 1,160 Sq M of associated speciality retail to be developed in conjunction with the supermarket (chore retail, impulse retail and personal retail) and up to 2,000 Sq M of retail to be hosted in along a 'main street' leading from the Tweed Coast Road to the beach.

The 2,000 Sq M of speciality space will also include chore retail, impulse retail, personal retail and food/beverage services. It is likely that the Icon building will anchor the eastern end of the street with a mix of restaurants, cafes and casual dining options (eg an ice cream stand). This specialty space will service the needs of residents, tourist and day-trippers and will be complementary to the supermarket anchored precinct at the western end of the street.

The future expansion of the retail will be the subject of a separate application.

The need for a series of supermarket-anchored centres at Kings Forest, Casuarina Beach or Salt Village has been identified in the Tweed Retail Strategy. The centre will support the needs of these three communities and has the support of other local developers such as the Ray Group and Leda Developments.

The Far North Coast Regional Strategy¹ calls for villages that create an enhanced sense of community, support employment growth and provide commercial development that relates to the scale of adjoining urban areas. The development of the proposed centre at Casuarina achieves these objectives as it will primarily cater to the areas of Casuarina, Seaside City, Salt, Cabarita Beach and Kings Forest that are within the Urban Footprint but are unable to individually sustain a supermarket anchored shopping centre.

Regular shopping trips (eg supermarkets and local casual dining) are a key activity for the household and Casuarina will fulfil this role for the identified areas. Higher order shopping trips (fashion, furniture, homewares etc) will be conducted in Tweed Heads and South Tweed as is intended by the designation of these areas as a major regional centre.

¹ Far North Coast Regional Strategy, pp 6, 10, 25, 36

1.4 IMPLICATIONS

The proposed Casuarina Beach Town Centre will be compatible with the amenity and character of the residential and tourist components of Casuarina Beach.

At present the Tweed Coast (with the exception of Kingscliff) lacks full line supermarket shopping facilities. By themselves, these communities will not reach the threshold population to host a full line supermarket. Other than the Woolworths in Kingscliff, the next nearest supermarkets are located in South Tweed Heads, over 14 Km by road from Casuarina.

The growing population of the Tweed Coast means that the retail infrastructure will need to be staged in-line with population growth. This means that some retail services will be developed in the shorter term while threshold populations are developing in other communities.

2.0 Highest and Best Use

2.1 INTRODUCTION

The principles of Ecologically Sustainable Development (ESD) require a 'best use' approach for the site, with the proposed use being a reasonable compromise between the sometimes conflicting needs of social, environmental and economic outcomes. In order to determine what is the best use for the site, a series of alternatives have been addressed which may be established on site. The outcome of this section will indicate why the proposed uses for the site are considered the most appropriate.

2.2 ALTERNATIVE USES

2.2.1 Retail Only

While a supermarket anchored shopping centre and related uses are proposed for the site, the site is not considered appropriate as a major retail node. Under the Tweed Retail Strategy, need has been identified for a supermarket anchored centre to be located at Salt Village, Casuarina Beach or Kings Forest, subject to economic review.

Large scale retail uses such as bulky goods, department stores and discount department stores have not been identified for the area. Creation of any large scale on-site retail precinct would compete directly with Tweed Heads and Tweed Heads South. Large-scale retail would also detract from the function and amenity of Casuarina Beach and Salt Village, as well as Cabarita Beach/Bogangar.

The centres in Tweed Heads will continue to service the higher order retail needs of the local and tourist population.

The development of a large scale retail precinct (with a bulky goods, department store and discount department store focus) on site would impact the economic and social base of the community, as it would provide a new precinct, diverting people from Tweed Heads and Tweed Heads South and is not considered appropriate for this site.

2.2.2 Commercial Office Space

The Tweed Heads region is supportive of primarily local business, with commercial premises having a secondary function to retail, recreation and tourism services in the vicinity of this area. Offices within Tweed Heads primarily service the local population or are related to Council or Government functions.

Developing large scale commercial office space on this site (in excess of 20,000 Sq M) would detract from the function of Tweed Heads and duplicate a limited function. As such, large scale commercial office space on this site is not considered appropriate.

2.2.3 Low Density Residential

While low density residential development may be a potential developmental consideration, it is not considered to be the optimal sole use of the town centre, nor the most viable for economic and social vitality in the local area. Mixed use residential and retail allows economic activity and employment generation on a permanent basis, rather than the one-off development of a product that will have no flow-on effects for the future community. Mixed use residential and retail is also required to meet the needs of the local population. Low density residential by itself would not achieve this outcome. A better residential outcome is to establish higher density residential around the town centre.

2.2.4 No Development

This option would require the existing use to remain, which is vacant land.

With no change occurring, the site has the potential of becoming a 'black spot' in a key area with linkages to the residential uses of Salt Village, Seaside City and Casuarina Beach and as for low density residential, will not produce any positive result towards the economic viability of the region.

2.3 IMPLICATIONS

All of the above single use development options are considered to be unviable or an under utilisation of the site, being potentially detrimental to the intended planning outcomes of the region. While not developing the site is an option, it is considered that development of the site with a mixed use town centre is considered the most appropriate use for the site given the importance of the site to service the needs of the surrounding community.

The mixed use town centre has always been anticipated on the site (refer to the 1998 court consent).

A development with a mix of uses is considered to be the most appropriate for this site, providing the local area with increased services that will provide increased support and demand for services within the Town Centre. The development of the site is also expected to provide the opportunity to further enhance the development and vitalisation of Casuarina Beach, Seaside City and Salt Village by attracting increased investment into the region.

The development of a mixed use centre is consistent with the Tweed Retail Strategy which identifies the need for a supermarket anchored shopping centre within the local area. This will mean less travel and increased choice for the local community.

3.0 Existing Retail Infrastructure

3.1 INTRODUCTION

This section provides an overview of the existing retail infrastructure in the region and how the proposed town centre will fit with existing uses and trading patterns of residents and retailers.

A comparative assessment is provided to highlight the scale and function of the town centre in relation to surrounding townships. An overview of existing full-line supermarkets in the region is also provided.

3.2 CASUARINA BEACH

Casuarina Beach is located on the Tweed Coast within the Tweed Local Government Area (LGA). It is located between the established townships of Cabarita Beach/Bogangar and Kingscliff, with Cudgen to the west of the development. At completion, Casuarina Beach is anticipated to contain approximately 3,000 permanent residents and capacity for 2,600 tourists.

The proposed Casuarina Beach Town Centre will function to serve weekly and/or fortnightly grocery shopping needs of the local communities, and also the daily impulse needs of local residents, tourists and passing traffic, through the inclusion of convenience retail, retail services, food and beverage outlets and some small scale tourist related retail. Other centres such as the IGA Xpress located at Salt Village, Foodworks at Pottsville Beach and the small 727 Foodstore in Cabarita Beach/Bogangar, will continue to function as convenience centres, catering to the top-up needs of local residents.

3.3 EXISTING CENTRES INFRASTRUCTURE

The following describes the function and characteristics of existing shopping centres and street based retail uses in the area.

Figure 3.1 illustrates the existing centres surrounding Casuarina Beach.

Table 3.1 Existing Centres Infrastructure

Centre Name	Location	Distance from Site (by road)	Centre Size & Tenants	Function
Kingscliff Shopping Village	22-26 Pearl Street, Kingscliff	7.4 Km	Includes a full-line Woolworths supermarket and speciality stores including Kingscliff Village Pharmacy, Healthy Life, Kingscliff Bottle Shop and others.	Kingscliff Shopping Village serves the local population in terms of catering to their weekly and/or fortnightly supermarket needs and convenience shopping.
Centro Tweed	Corner Wharf and Bay Street, Tweed Heads	17.2 Km	Total 17,224 Sq M and includes a 4,083 Sq M Target and 4,054 Sq M Coles Supermarket. Also included is 9,087 Sq M of speciality retailers with tenants including City Beach, Colorado, McDonalds, OPSM, Sanity and Wallace Bishop.	This centre caters to the weekly and/or fortnightly supermarket needs of local residents, as well as tourists to a lesser extent. In addition to supermarket needs, Centro Tweed services the convenience, impulse and chore needs of local residents.
Tweed City Shopping Centre	54 Minjungbal Drive, Tweed Heads South	14.0 Km	Total 42,395 Sq M and includes a 7,381 Sq M Kmart, a 7,033 Sq M Big W, a 4,527 Sq M Woolworths, a 2,583 Sq M Coles Supermarket and a 1,152 Sq M Best and Less. In addition to this, the centre has 121 speciality stores across 12,986 Sq M with tenants including Athlete's Foot, Crossroads, Fone Zone, Lowes, Muffin Break, Rockmans and Tandy Electronics.	This centre caters to a broad range of shopping needs for locals and tourists to the Tweed Area.
Banora Shopping Village	59-71 Darlington Drive, Banora Point	13.3 Km	Total 4,427 Sq M including a 1,993 Sq M Bi-Lo and 22 speciality stores across 1,915 Sq M. Speciality tenants include Liquorland, Travelworld and Australia Post.	This centre caters to the basic day-to-day needs of the residents immediately surrounding the centre.
Salt Village	Bells Boulevard, Salt Village	4.4 Km	A small centre with tenants including IGA Xpress, Salt Village Bar (tavern), Cult Industries surf wear, Resort Apparel and Gift Shop, Salt Village Galleria and Salt Villagebean Espresso Bar.	Salt Village is a small centre catering to the top-up needs of local residents, and also provided impulse shopping for locals and tourists.
Pottsville Beach		10.9 Km	A town centre including a small Foodworks supermarket and various other speciality stores including a bakery, butcher, fruit and vegetables, hairdressers.	This centre serves to provide residents of and tourists to Pottsville Beach with their top-up and impulse shopping needs.
Ocean Shores	Rajah Road, Ocean Shores	27.6 Km	A small centre containing a Bi-Lo supermarket.	This centre serves the local community with their weekly and/or fortnightly shopping needs.

Source: Property Council of Australia NSW/ACT Shopping Centre Directory, Conics

In terms of the surrounding retail network, the town centre will function differently to Centro Tweed and Tweed City Shopping Centre. These shopping centres consist of a full-range of retail facilities and cater to the higher order retail needs of residents. It will function to a similar standard as Kingscliff Shopping Village.

3.4 PROPOSED TRADE AREAS

The proposed Primary Trade Area (PTA) of the Casuarina Beach Town Centre (with the proposed Coles supermarket and associated convenience and speciality retail, as well as small scale commercial offices) is illustrated in Figure 3.1. The PTA is based on ABS Collectors' Districts (CDs) boundaries and is indicative only.

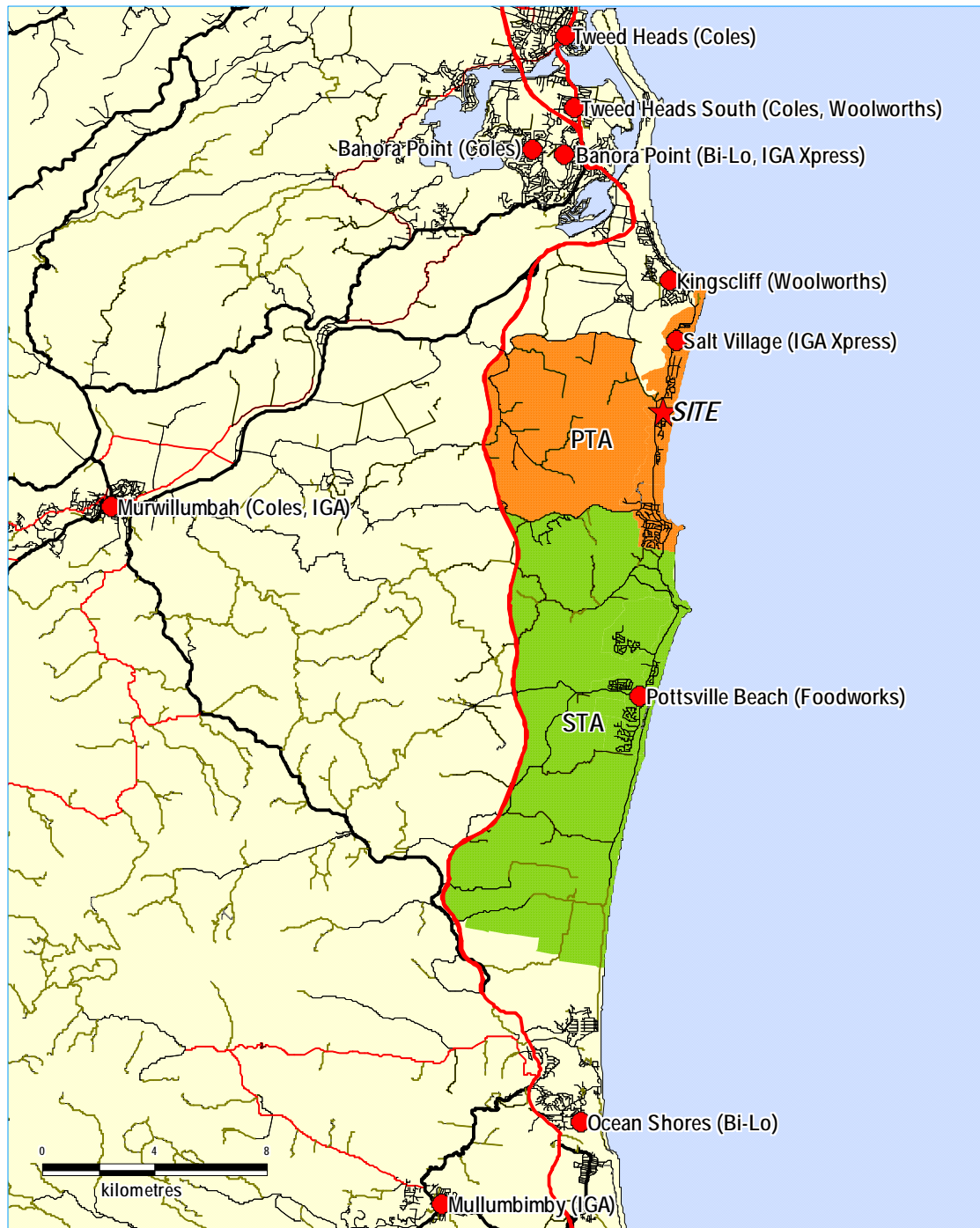
A town centre such as the Casuarina Beach Town Centre will serve a localised catchment. The PTA is considered to represent a catchment and is shaped by physical and psychological barriers to movement (such as the Pacific Motorway to the west of the site), the existing retail infrastructure (such as that located in Kingscliff, Murwillumbah and Ocean Shores), the local community of interest and the local road network.

The proposed town centre is likely to attract secondary trade from Hastings Point and Pottsville Beach (Secondary Trade Area (STA)). This is based on the lack of retail facilities in that area and the accessibility by the local road network to the proposed town centre.

Over time as the Pottsville Beach area develops, it is likely that retail facilities (such as a supermarket anchored shopping centre) will be provided. Depending on the type of centre and retail tenants, trade from this area to the proposed town centre will decline. However, until such retail facilities are provided the proposed town centre will attract patronage from this area.

The location of the proposed town centre along Coast Road would attract inflow patronage from passing motorists travelling along the coast from Kingscliff in the north to Pottsville Beach and beyond in the south. Coast Road is a main north-south access road for residents of Salt Village, Casuarina Beach, Cabarita Beach/Bogangar, Hastings Point and Pottsville Beach. In the absence of a supermarket anchored shopping centre at Casuarina, residents of the local area will continue to travel to Kingscliff and Tweed Heads/South Tweed to conduct the bulk weekly shopping.

Figure 3.1 Primary & Secondary Trade Areas



3.5 CONCLUSION

The proposed Casuarina Beach Town Centre will primarily function to service the weekly and/or fortnightly shopping needs of local residents (including Salt, Casuarina Beach, Seaside City and Cabarita Beach/Bogangar).

A Coles supermarket, within the Town Centre will also service the shopping needs of residents from Hastings Point, Pottsville Beach and surrounding areas. A centre in Casuarina will service the needs of the residents of Pottsville until a new centre is established in that area. This progression was anticipated by the 2005 Tweed Retail Strategy.

4.0

Demographic Characteristics

4.1 INTRODUCTION

This section provides details and analysis of the key demographic trends and population projections for the defined trade areas and the implications these trends will have on the proposed town centre. For a point of comparison, the demographic characteristics of the PTA and the STA have been compared to the Tweed LGA and the NSW average. The demographic profile in Appendix B has been derived from the 2006 ABS Census.

4.2 KEY DEMOGRAPHIC FEATURES

The key features of the demographic profile include:

4.2.1 Age Distribution

In comparison to the STA, the Tweed LGA and NSW, the PTA has a marginally higher proportion of residents aged less than 20 years, with 32% in the PTA compared to 28% in the STA and 25% in the Tweed LGA. In addition, the PTA has a marginally higher proportion of residents aged 25 to 54 years with 45%, compared to 38% in the STA and 36% in the Tweed LGA. The PTA has a significantly lower proportion of residents aged over 55 years with 19%, compared to 31% in the STA and 35% in the Tweed LGA.

The age distribution in the PTA is indicative of families with children. This age distribution is indicative of a growth area that is marketed with a strong community feel.

4.2.2 Dwelling Type

The most common type of dwelling in the PTA is a separate house with 74% of dwellings being separate houses. This is followed by the STA with 68% and the Tweed LGA with 65%. The next most frequent dwelling type in the PTA is townhouses with 19%, which is in line with the Tweed LGA with 19% and higher than the STA with 16%.

4.2.3 Household Structure

In the PTA 45% of households comprise of couple families with children. This is higher than 37% of households in the STA and 35% in the Tweed LGA. There is a lower proportion of couple families without children in the PTA with 36%, compared to 45% in the STA and 45% in the Tweed LGA. The PTA has a higher proportion of one parent families with 19%, compared to the STA and Tweed LGA with 18% each. The PTA has a stronger family orientation than the rest of Tweed Shire.

4.2.4 Average Household Incomes

Residents in the PTA have an average annual household income of \$62,250 (June 2007 dollars), which is higher than the STA with \$49,096 and the Tweed LGA with \$48,350.

Household Ownership

62% of dwellings in the PTA are fully owned or being purchased, which is lower than the STA with 64% and the Tweed LGA with 69%. The number of residents renting in the PTA (36%) is significantly higher than the STA (31%), Tweed LGA (27%).

4.2.5 Rent and Mortgage Repayments

The PTA is considered to be more expensive to live in than the remainder of Tweed Shire. The average monthly mortgage in the PTA is \$1,684, which is \$199 more expensive than the STA and \$244 more expensive than the Tweed LGA. The average monthly rent in the PTA is \$1,058, which is \$99 more expensive than the STA and \$189 more expensive than the Tweed LGA. In addition, it is on average \$626 cheaper per month to rent in the PTA compared to paying a mortgage.

4.3 POPULATION PROJECTIONS

Table 4.1 provides estimates of the population and household projections for the PTA and STA.

Table 4.1
Population Projections - for retail demand calculations

Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2026
<i>PTA - Resident</i>												
Casuarina Beach	890	1,068	1,246	1,424	1,602	1,780	2,030	2,280	2,529	2,779	3,029	3,029
Seaside City				200	400	600	800	1,000	1,200	1,200	1,200	1,200
Salt	310	510	710	910	1,110	1,310	1,409	1,409	1,409	1,409	1,409	1,409
Kings Forest				200	500	1,000	1,800	2,600	3,400	4,200	5,000	10,000
Cabarita/ Bogangar/Rural	3,442	3,476	3,511	3,545	3,580	3,614	3,643	3,672	3,701	3,730	3,759	3,759
<i>Sub Total</i>	<i>4,642</i>	<i>5,054</i>	<i>5,467</i>	<i>6,279</i>	<i>7,192</i>	<i>8,304</i>	<i>9,682</i>	<i>10,961</i>	<i>12,239</i>	<i>13,318</i>	<i>14,397</i>	<i>19,397</i>
<i>PTA - Tourist</i>												
Casuarina Beach	200	300	400	500	1,000	1,500	2,000	2,600	2,600	2,600	2,600	2,600
Salt	300	500	700	900	1,100	1,226	1,226	1,226	1,226	1,226	1,226	1,226
Seaside City				200	400	600	800	800	800	800	800	800
<i>Sub Total</i>	<i>500</i>	<i>800</i>	<i>1,100</i>	<i>1,600</i>	<i>2,500</i>	<i>3,326</i>	<i>4,026</i>	<i>4,626</i>	<i>4,626</i>	<i>4,626</i>	<i>4,626</i>	<i>4,626</i>
<i>Equivalent Residential Population at 30%</i>	<i>150</i>	<i>240</i>	<i>330</i>	<i>480</i>	<i>750</i>	<i>998</i>	<i>1,208</i>	<i>1,388</i>	<i>1,388</i>	<i>1,388</i>	<i>1,388</i>	<i>1,388</i>
<i>PTA Total</i>												
<i>Total Equivalent Residential Population PTA</i>	<i>4,792</i>	<i>5,294</i>	<i>5,797</i>	<i>6,759</i>	<i>7,942</i>	<i>9,302</i>	<i>10,890</i>	<i>12,348</i>	<i>13,627</i>	<i>14,706</i>	<i>15,784</i>	<i>20,784</i>
<i>STA</i>												
Hastings Point	615	629	642	656	669	683	697	710	724	737	751	774
Koala Beach	486	677	869	1,060	1,252	1,443	1,634	1,826	2,017	2,209	2,400	2,400
Pottsville	1,700	1,720	1,740	1,760	1,780	1,800	1,820	1,840	1,860	1,880	1,900	1,950
Black Rocks	1,116	1,173	1,230	1,286	1,343	1,400	1,400	1,400	1,400	1,400	1,400	1,400
Seabreeze	481	613	745	877	1,009	1,141	1,272	1,404	1,536	1,668	1,800	1,800
Rural	562	568	573	579	584	590	595	600	604	609	614	614
<i>STA Total</i>	<i>4,960</i>	<i>5,379</i>	<i>5,799</i>	<i>6,218</i>	<i>6,637</i>	<i>7,057</i>	<i>7,418</i>	<i>7,780</i>	<i>8,141</i>	<i>8,503</i>	<i>8,865</i>	<i>8,938</i>

Source: 2006 ABS Census, Conics interpreting TSC data

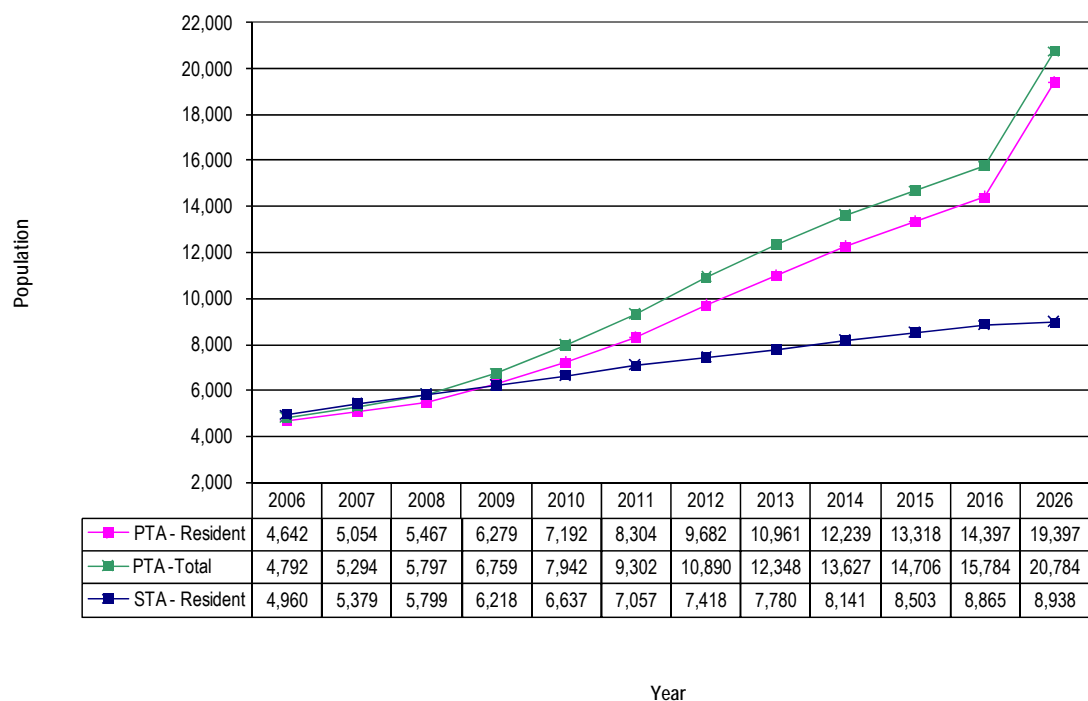
Table 4.2
Household Projections - for retail demand calculations

Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2026
<i>Household Size</i>												
PTA - Resident	2.87	2.86	2.84	2.83	2.81	2.80	2.78	2.77	2.76	2.74	2.73	2.73
PTA - Tourist	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
STA	2.58	2.57	2.55	2.54	2.53	2.52	2.50	2.49	2.48	2.47	2.45	2.45
<i>Household Numbers</i>												
PTA - Resident	1,617	1,770	1,924	2,221	2,557	2,967	3,476	3,955	4,439	4,855	5,274	7,106
PTA - Tourist	75	120	165	240	375	499	604	694	694	694	694	694
PTA - Total	1,692	1,890	2,089	2,461	2,932	3,466	4,080	4,649	5,133	5,548	5,968	7,800
<i>STA Total</i>	<i>1,922</i>	<i>2,095</i>	<i>2,270</i>	<i>2,447</i>	<i>2,625</i>	<i>2,805</i>	<i>2,963</i>	<i>3,123</i>	<i>3,285</i>	<i>3,448</i>	<i>3,613</i>	<i>3,642</i>

Source: 2006 ABS Census, Conics interpreting TSC data

The population is represented graphically as follows:

Figure 4.1 Population Projections



Implications

- The PTA will have a much greater population at capacity as a result of the areas of Casuarina, Seaside City, Salt and Kings Forest. The resident population of this area is expected to increase to 14,397 by 2016.
- The STA is expected to increase to 8,865 people in 2016 (from 4,960 in 2006) primarily due to capacity remaining in Koala Beach and Seabreeze estates.
- Both trade areas have the capacity to host a significant tourist population. In the PTA, Casuarina Beach, Salt and Seaside City will have a daily potential tourist population of 4,626 people. This is considered to be the equivalent of 1,388 full time residents for the purpose of calculating retail demand.
- The PTA will have a greater population than the STA from 2009 onwards as a result of development capacity of the area.
- The population growth rate has the potential to increase or decrease depending on a number of factors (development intent, the economy, interest rates etc). These projections are based on historical growth rates modified by the capacity for growth.

4.4 IMPLICATIONS

The nature of the PTA indicates that everyday services such as chore, convenience and impulse shopping will be in high demand. Centres in Tweed Heads and Kingscliff currently provide this service to local residents.

The proposed town centre will support the growing population's shopping requirements at a more functional and convenient level than the centres located at Tweed Heads.

A supermarket anchored shopping centre generally has a threshold population of 10,000 people, with the second at about 16,000 to 18,000. By this measure, the combined PTA and STA will support such a centre by 2007 with the second in the period 2011/2012.

5.0 Expenditure Characteristics

5.1 INTRODUCTIONS

This section describes the expenditure characteristics for the PTA and STA by examining average annual convenience expenditure which includes supermarket expenditure, with comparison to the Tweed LGA.

This section will also determine the convenience retail expenditure potential of the defined PTA and STA based on the projected population.

5.2 HOUSEHOLD RETAIL EXPENDITURE

Table 5.1 provides an estimation of the average household retail expenditure for the PTA and STA by major retail categories. This is based on the New South Wales average household expenditure in the 2003/04 ABS Household Expenditure Survey. The expenditure estimates are derived by assessment of the estimated household income of the PTA and STA with comparison to Tweed Shire averages.

The key features of Table 5.1 are as follows:

- The average annual household retail expenditure in the PTA is \$21,423. This is slightly higher than the Tweed Shire average of \$18,385 per year.
- The average annual income of residents of the PTA is expected to increase at a greater rate than the average of the Tweed LGA. Using the 2006 average will provide a conservative estimate over time.
- The proportionally higher household retail expenditure is due to higher household incomes in the PTA compared to the Tweed Shire average.
- The average annual household retail expenditure in the STA is \$18,385, in line with the Tweed Shire retail expenditure level.

Table 5.1
Household Expenditure Characteristics

	PTA	STA	Tweed LGA
Convenience			
Food and non-alcoholic beverages *	\$116.41	\$104.46	\$104.46
Alcohol for consumption off licensed premises	\$15.05	\$13.18	\$13.18
Books, newspapers, magazines and other printed material	\$8.34	\$7.47	\$7.47
Cleaning and Related *	\$9.57	\$8.67	\$8.67
Dry cleaning and related	\$0.66	\$0.51	\$0.51
Hair and personal services	\$6.69	\$5.33	\$5.33
Lottery tickets and lotto	\$3.51	\$3.61	\$3.61
Medicines, pharmaceutical products and therapeutic appliances	\$12.54	\$10.37	\$10.37
Personal care *	\$2.39	\$1.83	\$1.83
Stationery equipment	\$3.96	\$3.38	\$3.38
Tobacco products *	\$13.58	\$13.10	\$13.10
Toiletries and cosmetics	\$10.84	\$9.20	\$9.20
Photographic film and chemicals (including developing)	\$1.24	\$1.13	\$1.13
Weekly Sub Total	\$204.77	\$182.25	\$182.25
Annual Sub Total	\$10,676.95	\$9,502.32	\$9,502.32
<i>Derived Supermarket Expenditure (categories marked* plus 25% for general merchandise)</i>			
Weekly Sub Total	\$177.43	\$160.07	\$160.07
Annual Sub Total	\$9,251.22	\$8,346.22	\$8,346.22
Clothing and Footwear			
Weekly Sub Total	\$29.59	\$23.14	\$23.14
Annual Sub Total	\$1,542.59	\$1,206.36	\$1,206.36
Large Floorspace Comparison/Destination Retailers			
Audio-visual equipment and parts	\$10.65	\$8.09	\$8.09
Blank and pre-recorded media (excluding pre-packaged computer software)	\$5.80	\$4.36	\$4.36
Gardening products	\$3.44	\$2.95	\$2.95
Home computer equipment (including pre-packaged software)	\$5.79	\$4.80	\$4.80
Household furnishings and equipment	\$46.89	\$40.82	\$40.82
Motor vehicle parts and accessories purchased separately	\$9.20	\$7.62	\$7.62
Swimming pool chemicals	\$0.37	\$0.30	\$0.30
Tools and related	\$9.28	\$8.47	\$8.47
Weekly Sub Total	\$91.43	\$77.41	\$77.41
Annual Sub Total	\$4,766.97	\$4,036.15	\$4,036.15
Other Retail			
Animal Food and purchases	\$6.73	\$5.85	\$5.85
Other recreational and educational equipment	\$12.98	\$10.35	\$10.35
Photographic equipment and photography	\$0.81	\$0.23	\$0.23
Sunglasses (excluding prescription)	\$0.45	\$0.30	\$0.30
Travel goods, handbags, umbrellas, wallets and related	\$6.92	\$6.09	\$6.09
Watches and jewellery	\$3.42	\$2.25	\$2.25
Weekly Sub Total	\$31.32	\$25.08	\$25.08
Annual Sub Total	\$1,633.14	\$1,307.58	\$1,307.58
Food and Beverage			
Meals in restaurants, hotels, clubs	\$18.91	\$15.94	\$15.94
Fast food and takeaway	\$25.32	\$20.69	\$20.69
Alcohol for consumption on licensed premises	\$9.52	\$8.11	\$8.11
Weekly Sub Total	\$53.76	\$44.73	\$44.73
Annual Sub Total	\$2,802.90	\$2,332.18	\$2,332.18
<i>Weekly Sub Total</i>	<i>\$152.33</i>	<i>\$125.62</i>	<i>\$125.62</i>
<i>Annual Sub Total</i>	<i>\$7,942.70</i>	<i>\$6,550.08</i>	<i>\$6,550.08</i>
Weekly Total	\$410.87	\$352.60	\$352.60
Annual Total	\$21,422.55	\$18,384.59	\$18,384.59

Source: Conics, ABS

Note: All figures in June 2007 Dollars

5.3 HOUSEHOLD RETAIL EXPENDITURE POTENTIAL

Table 5.2 shows the total estimated retail expenditure generated from households in the PTA and STA and also outlines the projected future convenience and food/beverage expenditure from these areas.

The total convenience and food/beverage retail expenditure currently generated from households in the PTA and STA is approximately \$53 million. This is projected to increase based on population growth to approximately \$84.5 million in 2011 and approximately \$129.2 million in 2016. The growth in retail expenditure in the PTA and STA is considered a conservative estimate as it does not account for growth in the proportion of household convenience retail expenditure or growth in household income.

Table 5.2
Household Retail Expenditure Potential

Avg Annual Household Expenditure	PTA	STA	Tweed Shire
Convenience Retail	\$10,677	\$9,502	\$9,502
Clothing & Footwear	\$1,543	\$1,206	\$1,206
Large Floorspace Retail	\$4,767	\$4,036	\$4,036
Other Retail	\$1,633	\$1,308	\$1,308
Food and Beverage	\$2,803	\$2,332	\$2,332
Total	\$21,423	\$18,385	\$18,385

Forecast Retail Expenditure Potential (\$m)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
PTA Households	1,662	1,845	2,029	2,461	2,932	3,466	4,080	4,649	5,133	5,548	5,968
STA Households	1,922	2,095	2,270	2,447	2,625	2,805	2,963	3,123	3,285	3,448	3,613
Total Households	3,585	3,940	4,299	4,908	5,556	6,270	7,043	7,772	8,418	8,996	9,581
PTA Conv and Food/Bev Retail	\$22.41	\$24.87	\$27.35	\$33.17	\$39.52	\$46.72	\$55.00	\$62.67	\$69.19	\$74.79	\$80.45
STA Conv and Food/Bev Retail	\$25.91	\$28.25	\$30.60	\$32.98	\$35.38	\$37.80	\$39.94	\$42.10	\$44.28	\$46.48	\$48.70
Total Conv and Food/Bev Retail	\$48.32	\$53.12	\$57.95	\$66.15	\$74.90	\$84.52	\$94.94	\$104.77	\$113.47	\$121.27	\$129.14
PTA Total Retail Expenditure	\$35.61	\$39.52	\$43.47	\$52.72	\$62.80	\$74.25	\$87.41	\$99.60	\$109.96	\$118.86	\$127.85
STA Total Retail Expenditure	\$41.18	\$44.89	\$48.63	\$52.41	\$56.23	\$60.08	\$63.48	\$66.91	\$70.37	\$73.86	\$77.39
Combined Retail Expenditure	\$76.80	\$84.41	\$92.10	\$105.13	\$119.03	\$134.33	\$150.89	\$166.50	\$180.33	\$192.72	\$205.24

Source: Conics, ABS

Note: All Figures in June 2007 Dollars

5.4 IMPLICATIONS

Currently (2007) the total household convenience and food/beverage retail expenditure of the PTA is approximately \$24.9 million. Total household expenditure on convenience and food/beverage retail by residents of the PTA is estimated to increase to \$46.7 million in 2011 and approximately \$80.5 million in 2016. Growth from 2006 to 2016 represents growth of approximately \$58 million or an average of nearly \$5.8 million per year.

The PTA is an evolving area in terms of population and expenditure growth. As the population gets wealthier, retail expenditure will also increase.

6.0 Social Impact Analysis

6.1 INTRODUCTION

This section provides an overview of the existing and planned social and economic environments for the proposed town centre development.

6.2 DEFINITION OF SOCIAL AND ECONOMIC IMPACT

Effective social impact assessments (SIA's) involve an understanding of demographics, economic and social indicators, and the values of communities and cultures.

By "social impacts" we mean the consequences to human populations of development that alter the ways in which people live, work, play, relate to one another, organise to meet their needs and generally cope as members of society. The term also includes cultural impacts involving changes to the norms, values, and beliefs that guide and rationalise their cognition of themselves and their society. In this instance, however, we define social impact assessment in terms of efforts to assess or estimate, in advance, the social consequences and community impacts that are likely to follow from proposed specific development.

The purpose of an SIA is to provide an indication of the ability of a community or group to adapt to changing conditions; define the problems or clarify the issues involved in a proposed change; anticipate and assess impacts on the quality of life; illuminate the meaning and importance of anticipated change; identify mitigation opportunities or requirements; and advise communities and other stakeholders on how to comply with regulations and policies.

The social and economic impact of any development is the effect it has on people. Such effects include changes to peoples way of life (how they live, work, play and interact), their cultural traditions (shared beliefs, customs and values), economic issues (employment, financial and business impact) and their community (population structure, cohesion, stability and character).

A Socio-Economic Impact Assessment can be defined as "the systematic appraisal on the day to day quality of life of persons and communities whose environment is affected by the development or policy change." (Burdge 1985:1).

6.3 ECONOMIC ENVIRONMENT

6.3.1 Economic Impacts

The Tweed Coast, from Salt Village south is characterised by small scale retail, commercial, rural and industrial uses. This is considered typical of a small coastal region which has been heavily reliant in the past on tourism. As the area continues to grow, in terms of both tourists and local residents, a higher level of retail facilities is required to directly service the needs of the population.

The proposed development (in concert with other new communities - Salt, Kings Forest and Seaside City) will reshape and redistribute the population and retail base of the area. The scale of new residential development is expected to alter the economic base of the area. The increasing population will generate increased demand for the local retail facilities, not only at Casuarina, but also for the surrounding towns of Cabarita Beach/Bogangar, Hastings Point and Pottsville Beach.

6.3.2 Employment

With the development of the town centre, additional employment opportunities are expected to evolve during the construction phase, and at the completion of the development within the proposed uses of the retail, professional and food/beverage components. At a rate of 1 employee per 25 Sq M of GFA, the total ongoing employment anticipated to be generated by the Casuarina Beach Town Centre is approximately 240 full-time equivalent jobs.

6.3.3 Investment

The site is to be developed by Kings Beach (No 2) Pty Ltd, with this investment expected to provide an injection for the local economy both directly and indirectly. During the construction phase there will be local employment opportunities created on site over an extended period of time, given that there are numerous buildings to be developed. Employment opportunities will be created during the construction phase for the construction industry from trades' people to laborers, to landscaping from earthmovers to gardeners. During the construction phase it is expected that some materials will be purchased and supplied locally and after completion there will be opportunities for gardeners as well as retail, professional and food/beverage employees.

Investment into the development will have both direct and indirect economic and financial injections into the community.

6.4 SOCIAL ENVIRONMENT

6.4.1 Community Networks

The development will strengthen the existing retail facilities in the area and is anticipated to improve the quality and quantity of facilities for social interaction. The town centre will include linkages with the beach which will be utilised by both the resident and tourist populations.

Within the proposed development the retail and food/beverage facilities will serve as an attraction for both residents and tourists. The presence of these types of facilities within the local area will lead to enhanced interaction between members of the community who may otherwise have travelled to Kingscliff or Tweed Heads for their shopping requirements, and hence, where they would interact with other members of the community.

6.4.2 Public Realm

The vacant site is not listed as a heritage site. The mixed-use development will provide high-quality public facilities, and the development is not considered to be an "overdevelopment" in the area.

6.5 SOCIAL AND ECONOMIC EFFECTS OF THE PROPOSED REDEVELOPMENT

The potential effects of the proposed development on elements forming the economic and social fabric of Casuarina Beach and its surrounding communities are summarised in Table 6.1.

Tweed Shire Council - Assessment of Social and Economic Impact of Developments, Checklist of Social and Economic Issues

Table 6.1 - Casuarina Beach Town Centre (Mixed Use Retail Centre)

Economic Impact	Criteria	Effect			
		Positive	Uncertain / Neutral	Negative	Net Total
1	Economic Impacts	Increases or decreases retail and other services within the local area	+		+
		Increases or decreases facilities within the local area	+		+
		Better uses or makes redundant existing infrastructure	0		0
		Impact on existing economic land uses (commercial, tourism etc)	0		0
2	Employment	Improves or reduces access to employment	+		+
		Increases or decreases long term jobs (temporary or permanent)	+		+
		Impact on skills/education	0		0
		Safeguards or threatens existing jobs	0		0
3	Additional Information for Industrial, Commercial or Retail developments	Jobs created directly from the development			
		• Construction Phase	+		+
		• Ongoing Operation (approximately 240 jobs)	+		+
		Investment in the development			
		• Construction (excluding land value)	+		+
		• Local Investment	0		0
Social Impact	Criteria	Effect			
		Positive	Uncertain / Neutral	Negative	Net Total
4	Community Networks	Provides or reduces facilities or opportunities for social interaction			
		Improves or reduces community identity and cohesion	+		+
		Improves or reduces existing residential amenity	+		+
		Creates or removes physical barriers between homes and community facilities	+		+
		Impacts on disadvantaged social groups	0		0
		Benefits or displaces disadvantaged groups	0		0
5	Public Realm	Consolidates or dislocates existing social or cultural networks	0		0
		Safeguards or threatens heritage sites or buildings, or archaeological sites	0		0
		Makes available/enhances or detrimental to public places/open space	+		+
		Provides or displaces public facilities	+		+
		Avoids or exhibits overdevelopment/large scale buildings	0		0
		Significant positive or negative public response in submissions/meetings	0		0
Community Infrastructure	Criteria	Effect			
		Positive	Uncertain / Neutral	Negative	Net Total
7	Human Service Facilities	Increases or decreases supply of:			
		• community support/welfare services	0		0
		• child care, health or educational services	0		0
		• special services for high need/disadvantaged groups	0		0
		Decreases or increases demand for:			
		• community support/welfare services	0		0
		• child care, health or educational services		-	-
		• special services for high need/disadvantaged groups	0		
8	Access	Increases or decreases in the choice of local shopping facilities	+		+
		Increases or decreases local recreation or leisure facilities	+		+
		Decreases or increases distance from homes to local community facilities and service	+		+
		Improves or reduces public transport services or access to such services	0		0
		Improves or reduces disabled access to local facilities	0		0
		Improves or reduces access by cycle to local facilities	+		+
		Improves or reduces pedestrian access to local facilities	+		+

6.6 COMMUNITY CONSULTATION

Consultation was undertaken with the community and other local agencies to determine the acceptable limits of impacts associated with the development.

Extensive community consultation has been undertaken by Promedia during June 2006, whereby they held a number of public displays at the Casuarina Conference Centre on behalf of Kings Beach (No 2) Pty Ltd. The public displays were held between Sunday, June 25 2006 and Tuesday, June 27 2006. Table 6.2 outlines the attendance at each of the community consultation sessions.

Table 6.2 Participant Summary			
Session Date	Number of Attendees	Local Communities Represented	Number of Feedback Sheets Returned
Sunday June 25	315	Casuarina Beach, Salt Village, Kingscliff, Bogangar, Pottsville, Tweed, Currumbin, Coolangatta, Banora Point, Burleigh, Ormiston, Brisbane	79
Monday June 26	21	Casuarina, Kingscliff, Cudgen, Coolangatta	18
Tuesday June 27	14	Casuarina, Kingscliff	12

Source: Promedia Community – Casuarina Village Masters Plan Display Consultation Report

6.6.1 Outcomes of Consultation

A number of issues are prevalent amongst community members and were discovered during the community consultation process. These issues include:

- A lack of sufficient retail facilities within the immediate area surrounding Salt Village and Casuarina Beach;
- A need for more retail competition and facilities, including food / beverage outlets close to the beach, such as those available at Salt Village;
- A need for more access roads to Salt Village from Tweed Coast Way to prevent funnelling past the retail centre and potentially causing delays to Salt Village residents;
- Concern that Casuarina Way could be upgraded into a main road, and as such, the speed limit of the road could be increased, raising the potential danger to children within the development;
- Disabled and elderly facilities and access to the beach.

Overall, the community was generally supportive of the mixed use nature of the development, including the full-line supermarket and associated Main Street convenience and boutique retail. The few concerns raised, such as raising the profile of Casuarina Way and disabled and elderly access to the beach can be negated through innovative design within the development and strong linkages with the beach.

6.7 CONCLUSION

The establishment of a mixed-use centre with a supermarket and associated main street village retail at Casuarina Beach is considered to be a good fit with the needs of the community and will service the areas of Kings Forest, Seaside City, Salt, Casuarina Beach and Cabarita Beach/Bogangar.

The Casuarina Beach Town Centre will be the first in this area of the Tweed Shire and will trade strongly to the local catchment including Kings Forest, Seaside Village, Casuarina Beach and Cabarita Beach/Bogangar. In the short term (to 2011/2012) the centre will also service the residents in and around Pottsville until a supermarket anchored centre is established in that area.

The inclusion of the mixed use Main Street, with a focus on small speciality retail and food/beverage is important as it will service the needs of the residents and tourists. The inclusion of appropriate cafes/restaurants is particularly important in attracting the tourist market to the town centre.

The Tweed Retail Strategy dated September 2005 anticipates the possible inclusion of additional supermarket anchored centres in Pottsville, Casuarina Beach / Salt Village and Kings Forest (as an emerging community). The lack of a full-line supermarket anchored shopping centre at Kings Forest and Salt Village places greater importance on Casuarina Beach establishing this type of facility.

There is also significant community need for such a facility given the distance to centres in Kingscliff and South Tweed and the opinions of the local community supporting the establishment of a supermarket anchored centre.

7.0

Economic Need and Impact Analysis

7.1 INTRODUCTION

This section assesses the economic need and impact for the proposed Casuarina Beach Town Centre. This section will also address the impact on existing centres within and surrounding the proposed trade areas.

7.2 IMPACT ASSESSMENT

Concept Plan – a mixed use main street consisting of retail, commercial, residential and other uses. The retail GFA will not exceed 5,660 Sq M defined as follows:

- Lot 1 – a retail site to be occupied by a supermarket anchored shopping centre with a maximum 3,660 Sq M of GFA (with a 2,500 Sq M Coles as the anchor).
- Lots 2, 5, 6, 12 and 13 – a series of mixed use sites extending along the main road from the supermarket to the beach.
- Lot 17 – a mixed use site proximate to the beach. This site will contain a series of food and beverage outlets and host an 'Icon' piece of architecture/building.
- The retail GFA in lots 2,5,6,12,13 and 17 will not exceed 2,000 Sq M GFA.

The expansion of the supermarket anchored shopping centre (with a possible 3,500 Sq M Coles supermarket and additional specialty stores) will be the subject of a future application. This expansion will occur in-line with consumer demand and a new economic statement will be prepared. A larger supermarket may be triggered by an increasing catchment population and/or increased tourist patronage. This is likely to occur when the catchment population reaches 13,000 to 14,000 people but this will depend on the competitive retail environment at the time and contemporary retail trends and practice. This report will deal with the current application only.

- The Town Centre will have two distinct yet complementary 'personalities':
- As an everyday centre for residents of surrounding communities to undertake chore (supermarket) shopping, impulse shopping, dining and other regular 'centre based' activities
- As a tourist centre servicing the needs of visitors to the area, this will include dining, tourist services and chore/impulse shopping

The impact assessment assumes that 2009 is the estimated first full year of operation for the Stage 1 precinct and as such, 2011 is considered an appropriate year for benchmarking comparisons due to the time required to build the market and the desire of retailers to become established ahead of peak demand. Stage 2 is likely to occur some time after 2014, but this will be triggered by consumer demand and population growth.

7.2.1 Current Scenario

2006 – Base Case

- In 2006 there was an estimated \$22.4 million in household convenience and food and beverage retail expenditure in the PTA and \$25.9 million in the STA. The total retail expenditure of PTA residents was estimated at \$35.6 million with STA residents having an expenditure of \$41.2 million.

- It is likely that a number of different centres are utilised for main shopping trips occurring at least once per fortnight. These centres are located at Kingscliff, Tweed Heads South, Tweed Heads and to a lesser extent, Ocean Shores. Supermarkets cater to the weekly and/or fortnightly supermarket needs of a localised catchment. The local convenience supermarkets located in proximity to the site (i.e. IGA Xpress Salt Village, Foodstore Pottsville Beach and 727 Cabarita Beach/Bogangar) function differently to full-line supermarkets in that they cater to the daily impulse needs of patrons, rather than the weekly and/or fortnightly bulk shopping trip.
- The proposed town centre on the subject site will function primarily as the bulk weekly shop and food/beverage precinct for residents (including short stay tourists) of the PTA and STA while people within walking distance of the centre will also use the precinct for frequent top-up convenience supermarket trips.
- The Town Centre will also provide leisure based retail targeting the tourist population.

7.2.2 Forecast Impacts

2009 – 1st year of operation

- In 2009 the retail expenditure in the PTA is estimated to increase to approximately \$52.7 million, whilst the expenditure in the STA is expected to increase to \$52.4 million.
- The retail component of the Casuarina Beach Town Centre (at 4,160 Sq M²) is estimated to turnover approximately \$20 million. \$8.44 million dollars of this total is attributable to the PTA and \$8.40 million is attributable to the STA. The remaining \$3 million will be inflow expenditure generated by day-trippers and tourists.
- Centres/precincts located at Tweed Heads, Tweed Heads South and Ocean Shores are all anticipated to have turnovers at or above 2006 levels. Impacts attributable to the subject site are expected to be offset by population and market growth in the catchments of these centres. Other new centres may impact the trading performance of the existing centres (eg the impact of the new Banora Point Coles on the South Tweed supermarkets and the Banora Point BiLo).
- The retailers at Kingscliff will likely see a reduction in turnover of 5% to 7% when compared to 2006 levels. The majority of this impact is expected to be restricted to the Woolworths supermarket as patronage is transferred to the proposed Coles at Casuarina.
- The development of the Casuarina Beach Town Centre will not undermine the viability of any centre in the area.

² In 2009 not all of the Town Centre will be established. It is assumed that the 4,160 Sq M will consist of the 2,500 supermarket, 1,160 Sq M of retail in the centre and a further 500 Sq M of main street based retail.

2011 – 3rd year of operation

- In 2011 the household retail expenditure in the PTA is anticipated to increase to approximately \$74.3 million, whilst expenditure in the STA is estimated to increase to approximately \$60.1 million.
- The retail component of the Casuarina Beach Town Centre (at 5,660 Sq M³) is estimated to turnover approximately \$27 million. \$12.7 million dollars of this total is attributable to the PTA and \$10.2 million is attributable to the STA. The remaining \$4 million will be inflow expenditure generated by day-trippers and tourists.
- All centres will experience an increase in turnover of 5% to 11% from 2009 due to market growth in the local catchment of each centre. Kingscliff will 'make good' the impacts and will trade at levels in excess of 2006. This is due to population growth in the Kingscliff area.

Post 2013

From 2009 onwards the PTA has a larger population than the STA, this may occur sooner depending on the rate of residential development. In 2013 the population in the STA is approaching 8,000 people and this is considered to be the threshold population for the establishment of a supermarket in this area. Once this supermarket is established the current PTA and STA will be served by two supermarkets, the first in Casuarina serving the PTA and the second in Pottsville serving the current STA.

7.3 NEED ASSESSMENT

Need for facilities as proposed in the application can be divided into three categories, community, economic and planning. The following addresses each category and how it relates to the proposed retail development on the subject site.

7.3.1 Community Need

Community need relates to the desire, wants and/or requirements of local residents and the demand that it can place on the need for facilities in the local community. The need for retail relates to the services and facilities that meet the day-to-day and weekly needs of the individual and households.

In terms of the need for retail and commercial use in the physical form, the style or type of facility, building, centre, etc generally relates to improving the physical well-being of the community and enhancing and/or improving the existing appeal, amenity and offer in the area.

³ By 2011 it is assumed that all elements of the subject application will be in operation. This will consist of the 2,500 supermarket, 1,160 Sq M of retail in the centre and 2,000 Sq M of main street based retail.

Community consultation undertaken during July 2006 shows that the local community, in particular residents of Casuarina Beach, have overwhelming support for a “local, reasonably priced supermarket⁴” with reaction relating to Coles as a tenant seen as very positive. The community also expressed for the shopping village to be united with the beach. The community believe the centre will provide a location where residents and tourists can gather, interact and relax, with a good mix of services within easy access of their homes. The community consultation identified that the community would like the town centre to provide, in order, entertainment facilities (including bars and restaurants), medical / health facilities and community / social interaction facilities. The research also identified that local residents are most likely to use the centre for grocery and food shopping, followed by entertainment and eating out.

The local community support the Casuarina Beach Town Centre and this is a good indication of need for the proposed development.

The communities of Casuarina Beach, Salt, Cabarita, Kings Forest and Seaside City all require access to the services of a full-line supermarket. At present these residents must travel 3-7Km to Kingscliff or 11-14Km to South Tweed to undertake what for most people is a weekly shopping trip. This travel trip is exacerbated for residents in and around Pottsville who have to travel 20 to 30 Km to undertake their weekly shopping trip. The Casuarina Beach supermarket will provide a more convenient option until a supermarket is established in Pottsville.

The supermarket (at the western end of the main street closet to the Tweed Coast Road) is therefore appropriately placed to cater to the residents of the PTA allowing for easy access to conduct the weekly shopping trip.

7.3.2 Economic Need

Economic need relates to the available expenditure pool generated by the trade area population as well as the real increase in retail expenditure over time. Growth in convenience expenditure can also occur through changes in consumers shopping patterns and behaviours as well as new trends in the market such as new retail concepts, retailers and changes in consumer preferences. All these issues relate to economic need of the community.

Population and expenditure are main drivers of need for different types of retail facilities and services. The PTA is projected to increase in population from 4,642 in 2006 to approximately 8,304 in 2011, an increase of approximately 3,662 people. The household convenience and food/beverage retail expenditure of the PTA is estimated to increase from \$22.4 million in 2006 to approximately \$46.7 million in 2011, an increase of approximately \$24.3 million or 108%.

There is currently a need for a supermarket located central and proximate to the existing and future residents of the communities of Casuarina Beach, Cabarita Beach, Salt and the future communities of Kings Forest and Seaside City. These people currently travel some distance from the local area for chore shopping needs which are primarily performed at higher-order centres.

In 2009 the Town Centre (with a 2,500 Sq M Coles and 1,160 Sq M of other retail) will cater to an estimated 33% of local convenience retail needs of local residents. This will expand in-line with the growing population and by 2011 the proposed 5,660 Sq M Casuarina Beach Town Centre (with a 2,500 Sq M Coles) will cater to approximately 35% to 40% of the local convenience retail demand. The proposed town centre will provide for the increasing retail needs of the growing local area resident and tourist population.

⁴ Source: Casuarina Village Masterplan Displays Consultation Report, July 2006

7.3.3 Planning Need

In September 2005 Core Economics produced the retail strategy for Tweed Shire. This concluded 2 years of work that focused on the key questions of the scale of new centres and how to integrate new development into existing communities. This strategy superseded earlier strategies that had an urban design focus.

The strategy embraced a philosophy of consolidating existing higher order centres such as South Tweed and Tweed Heads and establishing new/expanded local centres (anchored by full line supermarkets) in line with demand. From 2004 to 2024 the population of Tweed Shire is expected to increase from 86,700 to 131,600. This increase of 44,900 people will generate demand for at least an additional five supermarkets, most of which will be located in expansion areas.

The strategy identified that three of these potential supermarket anchored shopping centres could be located in the southern Tweed Coast in the areas of Salt/Casuarina, Kings Forest and Pottsville. The timing and scale of these centres would be dependant on actual patterns of development and it was recommended that an economic analysis be produced to accompany each application.

Since that time, further information is available on a number of issues. Salt Village has established a small convenience supermarket and the developer of Kings Forest has stated that the local centre in that area would not contain a full line supermarket. This places a greater importance on the communities of Casuarina Beach and Pottsville to establish suitably sized retail centres in order to cater to the needs of local residents. Without these facilities, local residents are forced to travel to Kingscliff or South Tweed to conduct basic food and grocery shopping.

The south coastal area of Tweed Shire has need and demand for a supermarket anchored shopping centre now; increasing population will see demand for a second supermarket anchored centre in 2011/2012. The two best locations for these centres (given anticipated population distribution and current trends) are Casuarina and Pottsville. The sequencing of these centres will be dependant upon site availability and other site planning issues.

The proposed centre at Casuarina was anticipated by the Tweed Retail Strategy and the inclusions (full line supermarket) are in keeping with scale expected.

The Casuarina centre is a 350M long street based precinct that is perpendicular to the beach. This will produce a walkable centre that will encourage maximum pedestrian activity. Centres of a similar walkable scale include Hastings Street in Noosa, the Corso in Manly and Marine Parade Kingscliff. The supermarket component will be one node within the street based centre. Other nodes and uses (leisure retail, tourist based retail, dining etc) are best located in proximity to the beach in order to maximise public benefit and enjoyment. This level of proximity and integration are hallmarks of street based centres and sustainable urban principles.

The planned layout will provide the best opportunity to create a viable centre for Casuarina with the supermarket located furthest from the beach (and closest to the Tweed Coast Road) with the retail and commercial that will cater to a mix of patrons (residents, tourists, day-trippers) linking the supermarket to the beach.

The current coastal communities in Tweed Shire are small in scale and have limited retail services. A centre of the type proposed in Casuarina will help alleviate this considerable disadvantage. Without a full line supermarket local residents will be required to travel to larger centres in the northern part of the shire to undertake everyday shopping.

7.3.4 Planning Issues

Is there an economic / community need for the proposed development on the subject site?

The proposed shopping centre on the subject site will cater to the supermarket needs of the PTA, and also initially cater to the needs of residents in the STA. Existing residents are currently travelling outside of the trade areas to patronise other centres for chore shopping. The proposed development will cater to the weekly and/or fortnightly chore shopping needs of the local community.

The current (2007) population⁵ of the combined trade areas is estimated to be 10,584 people and generate approximately \$84.4 million in retail expenditure.

A population of between 8,500-10,000 people is generally considered sufficient to support a small local supermarket-anchored centre such as the proposed development.

The population of the combined trade areas is estimated to be approximately 12,977 by 2009 and will generate approximately \$105.1 million in retail expenditure.

The proposed convenience retail on the subject site will provide a location for weekly and/or fortnightly chore shopping needs of existing and future residents. The additional food and beverage, and retail specialties provided in the centre will act as complimentary functions to the local community – including surrounding business facilities and other traffic generators.

The supermarket function is best located in proximity to the Tweed Coast Road to allow easy access for residents of the catchment who do not live within walking distance of the centre.

It is also considered that the inclusion of restaurants and other food and beverage facilities, as well as community service facilities will lead to greater interaction amongst the community and help to build relationships between residents of Casuarina Beach and surrounding communities.

Does the proposal progress the realisation of the Tweed Retail Strategy intents?

The subject site is located within an area identified as requiring a supermarket-anchored centre as part of the Tweed Retail Strategy.

The proposed town centre and mixed-use precinct on the subject site will not adversely affect the economic viability of existing centres, but rather enhance the quality, attractiveness and character of the area, as well as provide a local centre for local residents.

Developing the centre on the subject site is considered to be a good outcome for the community in terms of building community relationships and enhancing the overall appeal and amenity of the Tweed Coast area.

⁵ This population consists of residents and the full time residents equivalent in tourists- see Table 4.1

Tweed Retail Strategy

The Tweed Retail Strategy (prepared by Core Economics September 2005) identifies the need for supermarket anchored centres in the Tweed Coast based on future growth to cater to a localised catchment area.

In consideration of the Tweed Retail Strategy in November 2005 [at Council meeting 16 November 2005], the Tweed Shire Council had a number of resolutions. How the site 'fits' these resolutions is described as follows:

Item	Comment
The character of existing towns and villages and also retail facilities have to be protected;	The proposed centre will have a scale and function that does not threaten other centres and will reinforce the higher order functions of the higher order centres in Tweed Heads and South Tweed.
Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones;	The population growth in the Casuarina, Salt and Kings beach area is a clear instance where a new centre is required to support the population.
Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping;	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population with higher order shopping (department stores, discount department stores, large discount variety stores and concentrations of specialty stores) directed to the larger district centres including the major district centre of Tweed Heads South.
Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style;	The proposed centre will have a scale and function that does not threaten other centres.
Limit the scale of new large-scale retail centres in the coastal region to a level which caters for the majority of chore-type shopping needs. This concept is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking;	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population. Without a full line supermarket in the local area, residents will be required to drive between 7 am 17Km in order to conduct their regular weekly (chore) shopping. A long trip distance does not produce a social, environmental or economically sustainable outcome.
Council does not support the establishment of another district retail shopping centre.	<p>Tweed Shire is presently serviced by three district centres (Tweed Heads, South Tweed and Murwillumbah) with South Tweed being the largest (see resolution 3 above where South Tweed is described as the major district retail centre). The district centres host higher order shopping (department stores, discount department stores, large discount variety stores and concentrations of specialty stores).</p> <p>The issue of a district centre at Kingscliff was raised in the retail strategy and rejected by council.</p> <p>The proposed centre at Casuarina is not a district centre.</p>

A supermarket anchored centre at Casuarina is a local centre and is entirely consistent with the Tweed Retail Strategy and subsequent council resolutions.

7.4 SOCIAL AND ECONOMIC CONSIDERATIONS

The development of the Casuarina Beach Town Centre is not expected to negatively impact on the current retail facilities within the area, with the most proximate full-line supermarket being located at Kingscliff, and others located at Murwillumbah, Tweed Heads South and Tweed Heads. The latter two are contained within larger shopping centres which primarily service the local and tourist populations of Tweed Heads, Tweed Heads South and the northern urban area of Tweed Shire.

The development will enhance the facilities provided to residents and tourists of the Casuarina Beach and other local communities, as well as provide other local residents with a wider choice for chore and convenience shopping than is currently provided within the area. This functionality is increased by positioning the supermarket in proximity to the Tweed Coast Road as this will enhance accessibility for catchment residents.

The approval of the Casuarina Beach Town Centre will increase the number of people employed on site, both during the construction phase and after completion of the development in the supermarket and Main Street precincts, as well as general maintenance and management of the development.

The integration of linkages between the beach and the development, as well as the addition of approximately 300 car parks per kilometre of beach frontage of the development, will provide a positive social impact for the development, and will offer residents and tourist's easier access to this natural asset.

7.5 STATEMENT OF JUSTIFICATION

The site is currently vacant land, and as such, the development of the town centre will not be replacing any existing uses. The town centre will provide chore and food/beverage services to local residents as well as catering to the everyday needs of tourists staying in the area.

The development of the site will provide improved amenity and access to retail services for residents of the local area with the proximity to Tweed Coast Road a consideration in this regard.

No significant negative impacts from the proposed development on the local retail facilities or community are anticipated.

Once established, the centre is anticipated to primarily service the local population of approximately 6,759 people (in 2009) from within the PTA, whilst also catering to the needs of residents in the STA (approximately 6,218 in 2009). The Casuarina Beach Town Centre will provide an area for locals to meet and interact with each other, and hence, provide stronger community relations between both residents and tourists of the area.

Employment that is generated from the construction phase and ongoing employment (estimated at 240 full-time equivalent jobs) is anticipated to increase the existing employment base within the region, being short-term with the construction phase and long-term with the retail and Main Street precincts of the development, as well as the maintenance of the larger area.

Additional investment and expenditure will provide a financial injection into the economy of the Tweed Coast, particularly the areas of Casuarina Beach and Cabarita Beach/Bogangar, and facilitate further enhancements to these areas.

Assumptions

This report has been prepared on the instructions of the stated party and is intended to address the issues as defined in the methodology. The data, analysis and findings contained in this report are, therefore, not appropriate for use in any other circumstance. The report contains a series of projections and forecasts, which have been prepared on the basis of the best available information. Due to the dynamic nature of many of these issues and the number of variables involved, Conics can give no guarantee that these projections and forecasts will be realised.

Documents issued electronically are susceptible to being altered. Therefore, only versions held and issued by Conics can be used as an acceptable reference or source of information.

A

Appendix – Leda Holdings Pty Ltd Correspondence



09 NOV 2006

8 November 2006

Mr. Don O'Rourke
Kings Beach (No. 2) Pty Ltd
C/- Consolidated Properties Group
Level 12/344 Queen Street
BRISBANE QLD 4000

Dear Don,

Further to your enquiry, I confirm that it is not our intention to develop a shopping centre anchored by a full-line supermarket (2,500m² or larger) at Kings Forest.

We believe that no more than a convenience supermarket will be necessary to service the needs of the Kings Forest community.

Yours faithfully,
Leda Holdings Pty Ltd


Allan Keast
DIRECTOR

LEDA HOLDINGS PTY LTD ACN 001 404 337
LEVEL 1 CAVILL PARK 46 CAVILL AVENUE SURFERS PARADISE QLD 4217 PO BOX 1914 SURFERS PARADISE QLD 4217
TELEPHONE (07) 5370 5300 FACSIMILE (07) 5370 5050

B

Appendix - Demographic Profile

Demographic Profile	PTA		STA		Tweed Shire	
Total Persons	4,643		4,958		79,322	
Age						
0 to 4	321	6.9%	342	6.9%	4,226	5.3%
5 to 14	841	18.1%	729	14.7%	10,388	13.1%
15 to 19	329	7.1%	289	5.8%	5,085	6.4%
20 to 24	179	3.9%	186	3.8%	3,414	4.3%
25 to 34	511	11.0%	528	10.6%	7,080	8.9%
35 to 44	831	17.9%	705	14.2%	10,106	12.7%
45 to 54	757	16.3%	649	13.1%	11,362	14.3%
55 to 64	409	8.8%	656	13.2%	10,059	12.7%
65 to 74	270	5.8%	535	10.8%	8,786	11.1%
75 to 84	160	3.4%	289	5.8%	6,831	8.6%
85 years and over	34	0.7%	47	0.9%	1,984	2.5%
Marital Status - Persons						
Married	1,782	51.0%	2,093	54.0%	32,273	49.9%
Separated	153	4.4%	137	3.5%	2,276	3.5%
Divorced	336	9.6%	428	11.0%	7,101	11.0%
Widowed	138	3.9%	194	5.0%	5,351	8.3%
Never Married	1,088	31.1%	1,023	26.4%	17,709	27.4%
Total	3,497	100.0%	3,875	100.0%	64,710	100.0%
Language Spoken at Home						
English Only	4,319	97.2%	4,716	97.7%	72,682	96.7%
Other	123	2.8%	109	2.3%	2,478	3.3%
Total	4,442	100.0%	4,825	100.0%	75,160	100.0%
Relationship in Household						
Husband or wife in registered marriage	1,623	37.3%	1,940	40.7%	29,482	40.0%
Partner in de facto marriage	355	8.2%	370	7.8%	5,204	7.1%
Lone parent	230	5.3%	243	5.1%	3,969	5.4%
Child under 15	1,097	25.2%	1,052	22.1%	13,630	18.5%
Dependent student (15-24)	205	4.7%	188	3.9%	3,075	4.2%
Non-dependent child	203	4.7%	200	4.2%	4,088	5.5%
Other related individual	73	1.7%	62	1.3%	1,249	1.7%
Unrelated individ living in family h/hold	46	1.1%	33	0.7%	756	1.0%
Group household member	118	2.7%	92	1.9%	2,024	2.7%
Lone person	321	7.4%	453	9.5%	8,633	11.7%
Visitor (from within Australia)	81	1.9%	130	2.7%	1,641	2.2%
Total	4,352	100.0%	4,763	100.0%	73,751	100.0%
Household Structure						
Couple with no children	448	35.5%	654	45.3%	9,931	45.3%
Couple famiy with children	567	45.0%	530	36.7%	7,768	35.4%
One parent family	237	18.8%	257	17.8%	3,968	18.1%
Other family	9	0.7%	4	0.3%	247	1.1%
Total	1,261	100.0%	1,445	100.0%	21,914	100.0%
Internet Connection						
None	511	31.6%	767	39.8%	13,144	42.2%
Broadband or Dial up	1,047	64.7%	1,093	56.7%	16,730	53.8%
Not Stated	61	3.8%	66	3.4%	1,247	4.0%
Total	1,619	100.0%	1,926	100.0%	31,121	100.0%

Demographic Profile	PTA		STA		Tweed Shire	
Dwelling Type						
Separate house	1,190	73.6%	1,304	67.8%	20,362	65.4%
Semi-detached and townhouse	302	18.7%	304	15.8%	5,836	18.8%
Flat, unit, apartment	105	6.5%	88	4.6%	3,320	10.7%
Other dwelling	20	1.2%	226	11.8%	1,575	5.1%
Not stated	0	0.0%	0	0.0%	28	0.1%
Total	1,617	100.0%	1,922	100.0%	31,121	100.0%
Persons per Household						
Separate house	2.90		2.76		2.69	
Semi-detached and townhouse	2.23		2.07		1.94	
Flat, unit, apartment	2.18		2.00		1.73	
Other dwelling: Total	1.20		1.76		1.60	
Not stated	NA		NA		1.93	
Total	2.71		2.50		2.39	
Dwelling Ownership						
Fully owned	450	27.8%	780	40.6%	13,383	43.0%
Being purchased directly	546	33.7%	477	24.8%	8,075	25.9%
Rented	569	35.1%	605	31.5%	8,298	26.7%
Other Tenure	14	0.9%	12	0.6%	260	0.8%
Not Stated	41	2.5%	49	2.5%	1,104	3.5%
Total	1,620	100.0%	1,923	100.0%	31,120	100.0%
Monthly Housing Loan Repayments						
Average Repayment - Sept 2006 \$	\$1,656		\$1,460		\$1,416	
Average Repayment - Current \$	\$1,684		\$1,485		\$1,440	
Weekly Rent						
Average Rent - Sep 2006 \$	\$260		\$236		\$213	
Average Rent - Current \$	\$264		\$240		\$217	
Employment						
Employed - Full-time	Not Available		Not Available		Not Available	
Employed - Part-time	Not Available		Not Available		Not Available	
Employed - Not stated	Not Available		Not Available		Not Available	
Employed - Total	Not Available		Not Available		Not Available	
Unemployed	Not Available		Not Available		Not Available	
Total labour force	Not Available		Not Available		Not Available	
Not in the labour force	Not Available		Not Available		Not Available	
Occupation						
Upper White	Not Available		Not Available		Not Available	
Lower White	Not Available		Not Available		Not Available	
Upper Blue	Not Available		Not Available		Not Available	
Lower Blue	Not Available		Not Available		Not Available	
Other	Not Available		Not Available		Not Available	
Total	Not Available		Not Available		Not Available	
Average Number of Cars	1.67		1.53		1.50	
Household Income						
Average Weekly - Sept 2006 \$	\$1,174		\$926		\$912	
Average Weekly - Current \$	\$1,194		\$942		\$927	
Household Income - Sep 2006 \$	\$61,201		\$48,268		\$47,535	
Household Income - Current \$	\$62,250		\$49,096		\$48,350	

Source: ABS, Conics

Current Dollars - June 2007

C

Appendix – Land Use Plan



LAND USE PLAN

JOB NO: 1802-02-8 17/01/2008 WP: 18(F) SCALE: 2500 @ A3

CASUARINA BEACH TOWN CENTRE
CONSOLIDATED PROPERTIES





Economic and Need Review
Three Supermarkets,
Tweed Shire Coast

Prepared For: Kings Beach (No 2) Pty Ltd

19 June 2008

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Executive Summary

Background

Conics prepared the Economic Impact Assessment for a retail centre at Casuarina (dated February 2008). Since the preparation of this report a number of factors have emerged including the applications for supermarket anchored shopping centres at Pottsville and Cabarita. This report addresses the issues raised by these applications and is an addendum report to the February document.

History

The Tweed Coast is evolving from a series of small villages with a population of 14,800 people in 1996 to a series of new and expanded villages with a strong focus on tourism. By 2026 the population is expected to be 46,000, this represents an average annual growth of over 1,000 new residents per year. This increase in population will change the way in which services (including retail) are delivered to the community.

The population in this area has historically been concentrated in a number of villages including Fingal Head, Kingscliff, Cudgen, Cabarita Beach, Bogangar, Hastings Point and Pottsville. In the late 1990's a series of planning approvals and other measures were put in place to create a new concentration of urban development. The area (now known as the New Tweed Coast) includes the areas of Casuarina, Salt, Seaside City and Kings Forest. This area forms a concentration of population in the area between Kingscliff and Cabarita.

Retail Hierarchy

A retail hierarchy or network responds to the retail/centres needs of the community, the way the market caters to these needs and the vision/philosophy for the community. In a retail sense, supermarket anchored and small neighbourhood shopping centres are properly classified as lower order retail centres as they cater to regular household requirements. This group can be further defined as follows:

- **Chore Retail** (based on a major supermarket) - this type of shopping is based on the regular (weekly or fortnightly) trip to a major supermarket. A major (or full line) supermarket typically has a floor area in excess 2,000 Sq M, an extensive selection (20,000 plus stock keeping units) and a number of departments (fruit/veg, deli, bakery, seafood, butcher, health etc). Supporting retail can include other food and grocery retailers (fruit/veg, butcher, deli, chicken, etc), bottle shop, retail/professional services, food service retailers and other retail that caters to the regular needs of the household. This type of centre is driven by the range, selection and price offered by the major supermarket and the supporting retailers.
- **Impulse Retail** - this serves the immediate (top up) needs of the household and often is provided in small shopping groups. This can include small supermarkets (typically up to 500 Sq M), food service retailers (restaurants, cafes, fast food), bakers, newsagencies, bottle shops, retail/professional services and video shops. This type of centre services a 'neighbourhood' catchment (typically up to 2,000 households) and can be present in a suburban or village setting. Pottsville and Cabarita are examples of impulse retail based village centres. This type of centre is driven by the proximity to the household for 'top up' shopping.

Higher order retail centres cater to a diversity of less regular retail needs including homewares, computers, electronics, clothing, fashion accessories, furniture, hardware, auto accessories, household maintenance and specialist services. These types of retail are provided in major shopping centres that include department stores (eg Myer, Grace Bros), discount department stores (Big W, Target, Kmart) and concentrations of specialty stores or large bulky goods precincts.

The three current proposals for supermarket anchored retail centres on the Tweed Coast are similar in the sense

they are seeking to introduce new chore retail centres to a growing population. In all cases residents will need to travel to Tweed Heads or South Tweed to conduct higher order shopping.

The key issue with all the proposed centres is:

Should residents of the Tweed Coast be able to conduct chore shopping in their local area or will they be required to travel outside their community?

Conclusion

Residents of the Tweed Coast **should** be able to conduct chore shopping in their local area to enhance community and environmental sustainability.

A network of major supermarkets, established in line with demand is the only way to eliminate the need for local residents to travel excessive distances to undertake chore shopping. A network of small (500 Sq M) convenience supermarkets will not replace the larger supermarkets as residents will simply travel to the major supermarkets. The network of major supermarkets on the Tweed Coast has been anticipated by Tweed Shire Council in the Retail Strategy (2005), Council resolutions of 16 Nov 2005, Tweed Shire DCP - Section B9 (2000), Pottsville Village Strategy (Oct 98) and the Draft Pottsville DCP (Mar 08).

The Tweed Coast is evolving from a series of small villages with a population of 14,800 people in 1996 to a series of new and expanded villages with a strong focus on tourism. With an estimated population of about 20,000 in 2008, the region will support two supermarket anchored shopping centres immediately (being Kingscliff and one other) and a third by 2011/2012 (with current rates of growth). The fourth supermarket anchored shopping centre (or fourth supermarket) will not be sustainable until approximately 2020.

Casuarina is the best fit for the next supermarket on the Tweed Coast for the following reasons:

- Casuarina is central to a community of interest that includes Salt, Seaside City, Casuarina, Kings Forest and Cabarita.
- The proposed centre (unlike the site at Pottsville) will not impact on an existing village centre.
- The supermarket (unlike the site proposed in Cabarita) will not exacerbate any local traffic issues as it is proximate to the Tweed Coast Road.

Introduction

BACKGROUND

Conics prepared the Economic Impact Assessment for a retail centre at Casuarina (dated February 2008). Since the preparation of this report a number of factors have emerged including the applications for supermarket anchored shopping centres at Pottsville and Cabarita. This report addresses the issues raised by these applications and is an addendum report to the February document.

OVERVIEW

Three supermarket anchored shopping centres are proposed for the coastal area of Tweed Shire. These are:

- Casuarina – this village is proposed to comprise of a mixed use main street consisting of retail, commercial, residential and other uses. The 3,500 Sq M retail centre will be anchored by a 2,500 Sq M Coles supermarket) and will also contain 1,000 Sq M of speciality stores.
- Pottsville - The site is located on the corner of Mooball and Seabreeze Road, Pottsville, approximately 800 m from the current village centre. The centre is proposed to contain 4,930 Sq M GFA with a 3,200 Sq M supermarket, 1,500 Sq M speciality retail, kiosk (30 Sq M) petrol station (215 Sq M) and child care. (585 Sq M).
- Cabarita – the proposed 2,608 Sq M supermarket, 1,101 Sq M specialty stores, 678 Sq M of commercial space and 18 residential units are proposed to replace the current uses that include a service station, post office and motel.

This creates a complex approval and appeal framework as NSW Department of Planning is the consent authority for Casuarina and Cabarita while Tweed Shire Council is the consent authority for Pottsville. As supermarket anchored shopping centres trade to the village/town and surrounding areas on the Tweed Coast, approving authorities have the task to ensure that the network of centres best meets the needs of the population. This requires careful consideration of the scale, timing and function of each centre to ensure orderly development and an improved (and constantly improving) level of service for the community.

The approving authorities have the responsibility to coordinate these approvals and hold with adopted policy.

1.0 Are Supermarkets Important?

1.1 RETAIL HIERARCHY

A retail hierarchy or network responds to the retail/centres needs of the community, the way the market caters to these needs and the vision/philosophy for the community. In a retail sense, supermarket anchored and small neighbourhood shopping centres are properly classified as lower order retail centres as they cater to regular household requirements. This group can be further defined as follows:

- **Chore Retail** (based on a major supermarket) - this type of shopping is based on the regular (weekly or fortnightly) trip to a major supermarket. A major (or full line) supermarket typically has a floor area in excess 2,000 Sq M, an extensive selection (20,000 plus stock keeping units) and a number of departments (fruit/veg, deli, bakery, seafood, butcher, health etc). Supporting retail can include other food and grocery retailers (fruit/veg, butcher, deli, chicken, etc), bottle shop, retail/professional services, food service retailers and other retail that caters to the regular needs of the household. This type of centre is driven by the range, selection and price offered by the major supermarket and the supporting retailers.
- **Impulse Retail** - this serves the immediate (top up) needs of the household and often is provided in small shopping groups. This can include small supermarkets (typically up to 500 Sq M), food service retailers (restaurants, cafes, fast food), bakers, newsagencies, bottle shops, retail/professional services and video shops. This type of centre services a 'neighbourhood' catchment (typically up to 2,000 households) and can be present in a suburban or village setting. Pottsville and Cabarita are examples of impulse retail based village centres. This type of centre is driven by the proximity to the household for 'top up' shopping.

Higher order retail centres cater to a diversity of less regular retail needs including homewares, computers, electronics, clothing, fashion accessories, furniture, hardware, auto accessories, household maintenance and specialist services. These types of retail are provided in major shopping centres that include department stores (eg Myer, Grace Bros), discount department stores (Big W, Target, Kmart) and concentrations of specialty stores or large bulky goods precincts.

The three current proposals for supermarket anchored retail centres on the Tweed Coast are similar in the sense they are seeking to introduce new chore retail centres to a growing population. In all cases residents will need to travel to Tweed Heads or South Tweed to conduct higher order shopping.

The key issue with all the proposed centres is:

Should residents of the Tweed Coast be able to conduct chore shopping in their local area or will they be required to travel outside their community?

1.2 CURRENT USAGE PATTERNS OF SUPERMARKETS

In the 12 months to April 2008 Australian retailers had a total retail turnover of \$238 Bn¹. 41.2% of this amount (or \$97.8Bn) was spent on food retailing². Supermarkets and grocery stores captured \$68.6Bn (or 28.7% of total retail expenditure).

¹ Source ABS Cat No 8501.0

² Including supermarkets, groceries, takeaway food and other food retailing

This equates to \$160 of supermarket and grocery expenditure per household per week. This large and regular expenditure is required to maintain a household and provides the descriptor of 'chore' shopping. Conics has conducted numerous surveys on the patronage patterns of chore retail and in all cases a trip to the supermarket was a special purpose trip (from home to the supermarket and back to home) for over 80% of people.

Impulse retail centres capture between 8% and 15% of total retail expenditure with chore (supermarket) shopping centres capturing from 25% to 30% of total retail expenditure.

When given the choice of conducting the bulk weekly supermarket shopping trip in a small impulse supermarket (500 Sq M GFA) or a more distant major supermarket (2,000 Sq M plus) the vast majority of residents will travel to the major supermarket. This is currently demonstrated in the communities of Salt, Cabarita and Pottsville, each of these areas supports a small (IGA type) supermarket with the residents travelling to Kingscliff or South Tweed to visit a major supermarket for their regular weekly shop. A network of small supermarkets is not a substitute for major supermarkets provided in-line with demand. Any strategy that seeks to replace a suitable network of local major supermarkets with a series of small supermarkets ignores how people shop and is increasingly unsustainable as it forces residents to travel greater distances.

Any retail network must be cognisant of the 'facts' of consumer patronage. If the local centre does not provide for the needs of the residents then people will travel to obtain the services they require. In some instances this is unavoidable. This occurs in small towns or villages where the population cannot viably sustain a range of retail uses (eg a village that does not have an 8,000 person population required to support a major supermarket).

1.3 IMPLICATIONS

The weekly trip to the supermarket is a fixture in many households with the typical family spending \$150 plus per trip on groceries and other household staples. The scale and frequency of this shopping (supermarkets capture nearly 30% of the total household retail spend – over \$8,000 per year) must be reflected in the planning for supermarket anchored shopping centres. They are cornerstones of the local community and when properly planned (in conjunction with other services and facilities) can create a key community focus.

People will travel to a major supermarket (one in excess of 2,000 Sq M and with over 20,000 stock keeping units) to gain the choice, price and selection that is not available in a smaller (up to 500 Sq M) convenience supermarket.

A network of small convenience supermarkets is not a replacement for a network of major supermarkets as patrons will simply bypass the smaller stores in favour of the larger supermarkets. If major supermarkets are not located on the Tweed Coast, residents will travel to other centres including South Tweed and Kingscliff.

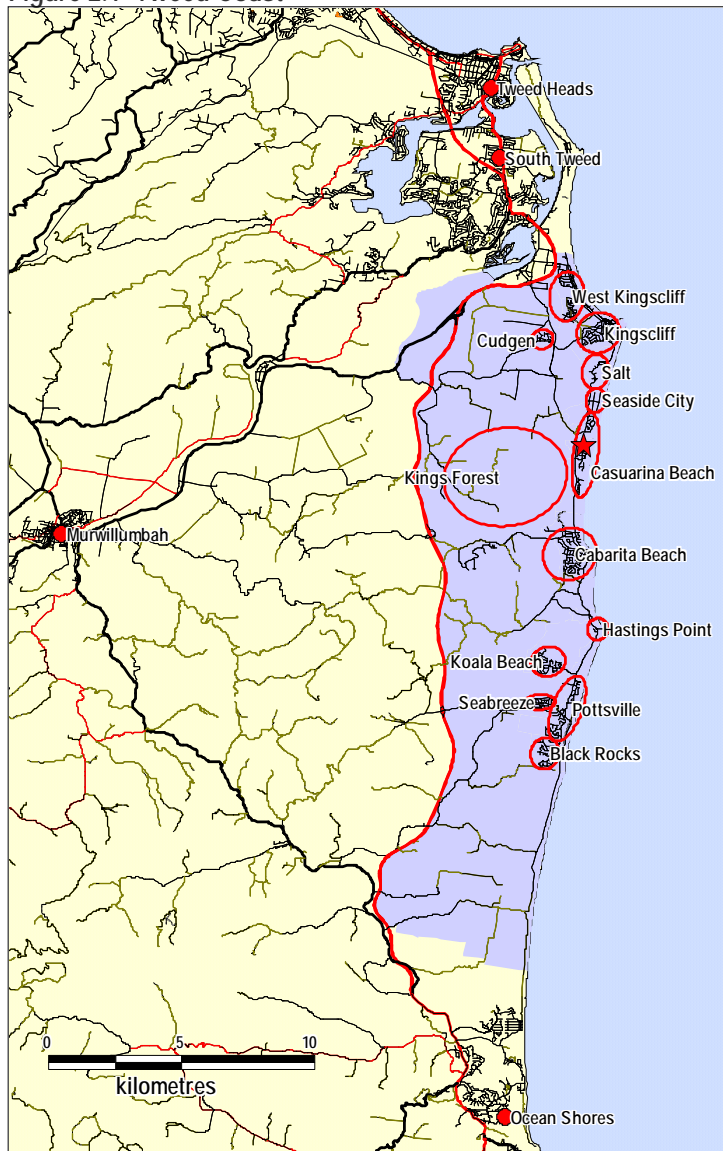
The outcome that favours the community and sustainability is a network of supermarket anchored shopping centres that are established in line with demand and in proximity to the residential areas they serve. This is the outcome anticipated by the Tweed Shire Retail Strategy with supermarkets in Pottsville and Casuarina.

2.0 What is the Tweed Coast?

2.1 DEFINITION

The Tweed Coast is the area that extends from the Tweed River in the north to the border with Byron Shire in the south and west to the Pacific Highway. Kingscliff is the largest service centre and provides a supermarket that anchors the retail facilities. Residents are required to travel to Tweed Heads and South Tweed to conduct higher order shopping. The Tweed Coast (indicated below) extends for a distance of 26Km between the Pacific Highway and the Pacific Ocean. As a point of reference, the distance (straight line) from the Sydney CBD to Parramatta is 20Km. The distances involved have significant implications for a local shopping trip if your nearest supermarket is 10 to 20 Km away.

Figure 2.1 Tweed Coast



2.2 HISTORY

The Tweed Coast is evolving from a series of small villages with a population of 14,800 people in 1996 to a series of new and expanded villages with a strong focus on tourism. By 2026 the population is expected to be 46,000, this represents an average annual growth of over 1,000 new residents per year. This increase in population will change the way in which services (including retail) are delivered to the community.

The population in this area has historically been concentrated in a number of villages including Fingal Head, Kingscliff, Cudgen, Cabarita Beach, Bogangar, Hastings Point and Pottsville. In the late 1990's a series of planning approvals and other measures were put in place to create a new concentration of urban development. The area (now known as the New Tweed Coast) includes the areas of Casuarina, Salt, Seaside City and Kings Forest. This area forms a concentration of population in the area between Kingscliff and Cabarita.

2.3 POPULATION

In 1996 this area had a population of about 14,800 people. In 2006 the population of the Tweed Coast was about 18,000 and Kingscliff remained the only supermarket anchored shopping centre.

A population of 8,000 to 10,000 people is the typical trigger point for providing a major (full line) supermarket.

With an estimated population of about 20,000 in 2008, the region will support two supermarket anchored shopping centres immediately (being Kingscliff and one other) and a third by 2011/2012 (with current rates of growth). The fourth supermarket anchored shopping centre (or fourth supermarket) will not be sustainable until approximately 2020.

3.0 Draft Retail Strategy

3.1 PREPARATION

In September 2005 Core Economics (now known as Conics) produced the Retail Strategy for Tweed Shire. This concluded 2 years of work that focused on the key questions of the scale of new centres and how to integrate new development into existing communities in a manner that was socially and economically sustainable. This strategy superseded earlier strategies that had an urban design focus.

A retail strategy must reflect the nature of retail and 'how people shop'. Without this practical input the strategy (and subsequent decisions) will be flawed.

3.2 PHILOSOPHY

The retail strategy embraced a philosophy of consolidating existing higher order centres (South Tweed and Tweed Heads) and establishing new/expanded chore centres (anchored by full line supermarkets) in line with demand. As defined in the Retail Strategy, from 2004 to 2024 the population of Tweed Shire was expected to increase from 86,700 to 131,600. This increase of 44,900 people would generate demand for at least an additional 5 supermarkets, most of which were to be located in expansion areas.

The strategy identified that 3 of these potential supermarket anchored shopping centres could be located in the Tweed Coast in the areas of Salt/Casuarina, Kings Forest and Pottsville. The timing and scale of these centres would be dependant on actual patterns of development and it was recommended that an economic analysis be produced to accompany each application.

Since the production of the Retail Strategy, further information is available on a number of issues. Salt has established a small convenience supermarket and the developer of Kings Forest has stated that the local centre in that area would not contain a full line supermarket. This places a greater importance on the communities of Casuarina and Pottsville to establish suitably sized retail centres in order to cater to the needs of regional residents. Without these facilities, local residents are forced to travel to Kingscliff or South Tweed to conduct basic food and grocery shopping.

Casuarina and Pottsville are considered the most appropriate locations for a supermarket anchored centre as they are central to a community of interest. Although the areas of Salt, Casuarina, Kings Beach and Seaside City are marketed under different names, they are considered to be the same 'suburb or planning unit' for the purposes of providing services and creating a community identify.

3.3 RELATIONSHIP WITH TWEED SHIRE DCP

Section B9 of the Tweed Shire DCP details the Tweed Coast Strategy for the area from Kingscliff in the North to Casuarina in the south and west to the Pacific motorway. The DCP anticipates three local town centres³ at Kingscliff, Casuarina and Kings Forest.

³ Defined as 1,500 to 6,000 Sq M of retail floorspace and serving a population of up to 10,000 people.

The retail strategy reinforced the DCP by identifying Casuarina and Kings Forest (plus Pottsville further south) as suitable locations for a supermarket anchored shopping centre. Supermarket anchored shopping centres can be delivered with a retail footprint of less than 6,000 Sq M. The proposed Casuarina Town Centre will be 3,500 Sq M in size with a 2,500 sq M Coles and 1,000 Sq M of speciality stores.

The decision by the developer of Kings Forest not to establish a full line supermarket in that locality increases the need for a centre at Casuarina.

3.4 ASSESSMENT

In consideration of the Tweed Retail Strategy in November 2005 [at Council meeting 16 November 2005], the Tweed Shire Council passed a number of resolutions:

1. The character of existing towns and villages and also retail facilities have to be protected
2. Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones
3. Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping
4. Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style
5. Limit the scale of new large-scale retail centres in the coastal region to a level which caters for the majority of chore-type shopping needs. This concept is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking
6. Council does not support the establishment of another district retail shopping centre
7. The retail concepts in these recommendations form the basis of locality plans in the Shire and any retail development applications which are submitted in the interim of these locality plans being prepared and approved by Council be assessed so that the above retail strategies are supported and not compromised.

How the three proposed sites 'fit' these resolutions is described as follows:

Item	Casuarina	Pottsville	Cabarita
The character of existing towns and villages and also retail facilities have to be protected.	The proposed centre will have a scale and function that does not threaten other centres and will reinforce the higher order functions of the higher order centres in Tweed Heads and South Tweed.	The supermarket as proposed will have significant impact on the current retail strip in Pottsville (this has been acknowledged by the Draft Pottsville Locality Plan). This proposal will reinforce the higher order functions of the higher order centres in Tweed Heads and South Tweed.	The inclusion of a full line supermarket in Cabarita with a population of less than 4,000 people will impact on their function and character of Cabarita. The increased traffic will create a congested village.
Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones.	The population growth in the Casuarina, Salt and Kings Beach area is a clear instance where a new centre is required to support the population.	The proposed supermarket is located 800m from the current retail strip and will create a new retail centre. This is not incremental expansion and will fracture the retail offering in Pottsville.	A full line supermarket is a major expansion of a small town and is not appropriate due to the small population of the area.

Item	Casuarina	Pottsville	Cabarita
Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping.	Higher order shopping will be directed to the larger district centres including the major district centre of Tweed Heads South.	Higher order shopping will be directed to the larger district centres including the major district centre of Tweed Heads South.	Higher order shopping will be directed to the larger district centres including the major district centre of Tweed Heads South.
Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style;	The proposed centre will have a scale and function that does not threaten other centres.	The proposed centre will significantly impact on the Pottsville Village.	The proposed centre will impact on Casuarina as it will split patronage between a number of centres which will produce a series of marginal or unsustainable outcomes.
Limit the scale of new large-scale retail centres in the coastal region to a level which caters for the majority of chore-type shopping needs. This concept is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking;	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population. Without a full line supermarket in the local area, residents will be required to drive between 7 and 17Km in order to conduct their regular weekly (chore) shopping. A long trip distance does not produce a social, environmental or economically sustainable outcome.	The proposed centre will provide for the chore shopping needs (ie supermarket and associated retail) of the local population. Without a full line supermarket in the local area, residents will be required to drive over 15Km in order to conduct their regular weekly (chore) shopping. A long trip distance does not produce a social, environmental or economically sustainable outcome.	The proposed centre will detract from the social, environmentally and economic sustainability of the region. A supermarket in Cabarita does not have a local catchment capable of supporting a supermarket and will rely on residents of Salt/Seaside City/Casuarina/Kings Forest (pop 10,600 in 2016) driving to Cabarita (or other centres) to conduct supermarket shopping. This will have a greater impact than residents of Cabarita (pop 3,700 in 2024 driving to either Casuarina or Pottsville to shop.
Council does not support the establishment of another district retail shopping centre.	The proposed centre is not a district centre.	The proposed centre is not a district centre.	The proposed centre is not a district centre.

3.4 CONCLUSION

The Retail Strategy identified that Cabarita had a population of 3,163 in 2004 and this was expected to increase to 3,700 in 2024. This population (3,700 in 2024) is less than half of what is required to support a major supermarket. The proposed Cabarita supermarket will rely on considerable inflow patronage from the north and is out of scale with the existing village.

Cabarita was rejected as a location for a major supermarket (identified in the strategy as 'chore retail') as the village has limited capacity for expansion and is proximate to the villages of Pottsville and Casuarina. Both these villages are central to catchments that will continue to grow. Casuarina will service the nearby communities of Salt, Kings Forest and Seaside City while Pottsville will service Seabreeze, Koala Beach and Black Rocks. The centrality of

Casuarina to the surrounding population and the location of the retail centre proximate to the Tweed Coast Road marks this as a particularly suitable site for a supermarket anchored shopping centre.

The coastal area of Tweed Shire has need and demand for another supermarket anchored shopping centre now; increasing population will see demand for an additional centre in 2011/2012. The two best locations for these centres (given anticipated population distribution and current trends) are Casuarina and Pottsville.

4.0 Overall Assessment

4.1 ASSESSMENT

The situation regarding the appropriate network of centres for the Tweed Coast can be summarised as follows:

Item	Casuarina	Pottsville	Cabarita
Identified in the Tweed Shire Retail Strategy	Yes – good long term location.	Yes – good long term location, subject to resolving the impact on the existing traders.	No – poor long term option located in a no-growth village.
In keeping with the objectives of the Tweed Retail Strategy	Yes.	Yes	No – prejudices the network of centres and encourages unsustainable traffic patterns.
Located in an existing/planned town/centre	Yes – the supermarket is located in the main centre of Casuarina.	No - impacts on smaller traders in Pottsville. The Draft Pottsville Locality Plan seeks a staged introduction of the supermarket anchored centre to minimise the impact on the current village.	Yes – established village.
Proximate catchment of suitable size	Casuarina is central to a catchment (including Cabarita) that will be in excess of 14,000 people in 2016 (plus tourists). This is a natural fit for a supermarket anchored shopping centre.	Pottsville is central to a catchment that will be in excess of 8,800 people in 2016 (not including the potential urban area of Dunloe Park). This is a good fit for a supermarket anchored centre.	Cabarita is central to a catchment of 3,700 in 2024. This will not support a full line supermarket and this population is best serviced by a supermarket at Casuarina.
Identified Need and Demand	Yes	Yes	No
Suitable timing and sequencing	Yes	The new supermarket will impact on the existing Pottsville retail strip. The Draft Pottsville Plan seeks a staged introduction of the supermarket centre to minimise the impact on the current village.	No – Cabarita will not host significant urban growth and as such a full line supermarket is unsuitable.
Create strong local communities	Yes – the supermarket is integrated with the Main Street of Casuarina.	Will need to overcome the impact on Pottsville with the existing retail strip changing function over time.	Would create a centre that relies on significant traffic from other coastal communities. The small catchment increases the chance of a supermarket on the subject site (and other retailers in Cabarita) failing.
In keeping with adopted policy	Yes	Partly	No

A supermarket anchored centre at Casuarina now and another at Pottsville in 2011/12 is the best outcome for the community for the following reasons:

- A network of suitable local major supermarkets cannot be 'replaced' by a network of small supermarkets as people will travel to the major supermarkets to conduct the bulk weekly shopping trip.
- The village of Cabarita is a small community with limited capacity to expand; a supermarket is out of scale with the needs of this community now and in the foreseeable future.
- The provision of a supermarket in Cabarita will undermine the orderly provision of retail services in the Tweed Coast; this may delay other centres developing that are better suited to cater to the needs of the local population.
- A supermarket at Cabarita will detract from the social, environmentally and economic sustainability of the region. Cabarita does not have a local catchment capable of supporting a supermarket and will rely on residents of Salt/Seaside City/Casuarina/Kings Forest (pop 10,600 in 2016) driving to Cabarita to conduct supermarket shopping. This will have a greater impact than residents of Cabarita (pop 3,700 in 2024 driving to either Casuarina or Pottsville to shop).
- Cabarita is not considered to be an appropriate location for a supermarket anchored centre.
- Casuarina and Pottsville are larger than Cabarita (and will have significant population growth) and are better able to host the chore based retail as provided by a full-line supermarket. This retail function is a better fit for these villages given the population base of each of these areas.
- Casuarina is central to a catchment (including Cabarita) that will be in excess of 14,000 people in 2016 (plus tourists). This is a natural fit for a supermarket anchored shopping centre.
- There is need for a supermarket anchored shopping centre in Casuarina now, this will be the second full line supermarket serving the Tweed Coast.
- There will be need for a supermarket anchored shopping centre in Pottsville in 2011/2012; this will provide a greater opportunity to ameliorate the impact of an out-of-centre supermarket.
- The region (at current growth rates) will not support another supermarket until after 2020.

Assumptions

This report has been prepared on the instructions of the stated party and is intended to address the issues as defined in the methodology. The data, analysis and findings contained in this report are, therefore, not appropriate for use in any other circumstance. The report contains a series of projections and forecasts, which have been prepared on the basis of the best available information. Due to the dynamic nature of many of these issues and the number of variables involved, Conics can give no guarantee that these projections and forecasts will be realised.

Documents issued electronically are susceptible to being altered. Therefore, only versions held and issued by Conics can be used as an acceptable reference or source of information.