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# **Trinity Point Marina and Mixed Use Resort**

## **Socio-Economic Study**

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Johnson Property Group

Prepared By  
Key Insights Pty Ltd

June 2008

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# EXECUTIVE SUMMARY

This Socio-Economic Impact Assessment evaluates the likely social and economic impacts, issues and opportunities associated with the proposed development of a marina, residential and tourism project, known as the Trinity Point Marina and Mixed Use Resort proposal, located on the Morisset Peninsula in Lake Macquarie LGA.

Key Insights has considered social issues arising from the Director General Requirements, as well as broader socio-economic impact themes that will assist Lake Macquarie Council in its deliberation regarding the proposal, and the Department of Planning in consideration of approval.

This study projects a residential population of approximately 140 permanent residents and an average nightly tourist population of approximately 110 temporary residents (although these will be largely influenced via seasonal and holiday variations). The residential projection is based on the existing apartment household size of the Morisset Park population, however the higher density urban form is considered likely to deliver a smaller household size and less families with children. Final residential population will be determined by a mix of housing choice, price sensitivities, final on-site amenity/facility and target marketing.

An expected number of day visitors is difficult to determine and will depend on a number of variables such as the number of watercraft in the marina, weather and seasonal factors, access conditions, and marketing of the development for day visitors.

## SUMMARY OF KEY FINDINGS

### COMMUNITY CONSULTATION

Johnson Property Group has facilitated its own community consultation strategy, comprising meetings with community groups and facilitation of a Community Open Day (including feedback survey) and supplied Key Insights documentation of findings from the process. The Community Open Day (25/11/07) undertaken by the Proponent aimed to enable input from interested community members directly to JPG and presented an opportunity for Key Insights to independently assess (via direct discussion) current community issues, aspirations and concerns about the development.

Discussions at the Open Day identified considerable support expressed for the Trinity Point concept of tourism and mixed use development with concern expressed regarding the key issues of scale, noise and traffic impacts. Concern regarding helicopter noise and the size of the marina were major issues, followed by issues regarding roads and local amenity/lifestyle impacts. Those living in closer proximity to the proposal, including opposite waterfront, were noted as exhibiting increased concern regarding the development.

Local and regional economic/employment and tourism/recreational benefits were identified as potential positive impacts, including enhanced public access to lake.

### SOCIAL AND STRATEGIC PLANNING

Whilst the Trinity Point proposal seeks consideration under the state government planning process, for optimum social outcomes, it will contribute and respond to local social and strategic

objectives. Review of Lake Macquarie City Council's planning documents identifies a number of areas that the proposal contributes to achieving Council's social and strategic planning intentions. Of particular note is the Proposal's contribution to Lifestyle 2020 vision for future tourism and economic development in Morisset Planning District and Council's general focus on lakeside recreational planning.

### **SOCIAL INFRASTRUCTURE**

Whilst a significant increase in the local area, population growth associated with the proposal is considered nominal within District-wide growth projections, which predict up to 5000 new residents in Morisset township and Cooranbong alone.

Social infrastructure needs emerging from new residents of Trinity Point are considered insufficient to significantly stress existing District social and community resources, such as schools, public transport, health and community services, but will need to be considered in cumulative planning for the area. Local hard infrastructure needs are the subject of separate expert reports prepared for the proposal.

Current Council and State government planning processes include consideration of infrastructure, including social infrastructure, necessary to meet projected increases in Morisset District population. Trinity Point provides an opportunity to meet some of these needs via contributing to the critical residential and tourist threshold necessary to sustain increased and improved infrastructure, and directly injecting retail, recreational and tourism dollars into the local and regional economy.

Regional benefits accruing from provision of new recreational and tourism infrastructure is considered to outweigh potential negative impacts of population growth.

### **ECONOMIC IMPACTS**

Findings from the economic assessment (Section 6) identify varied and beneficial impacts on the local and broader economy. The study projects considerable localized tourist and residential spending and considerable wider spending captured in the surrounding Morisset District, primarily Morisset Town Centre.

The proposal will increase and diversify employment opportunities available in the local area and Morisset Planning District, offering direct employment during construction and operation, and flow on effects through a range of industries, including that emerging via increased consumption patterns of new employees.

Construction employment is expected to yield 810 direct jobs, based upon an estimated construction cost of \$90M and standard ABS construction industry multipliers. The operation of the marina and associated facilities are estimated to yield approximately 60 fulltime equivalent jobs. These will occur across a number of service industries including hospitality, retail and tourism, while providing a number of trade and apprenticeship positions.

Comparative analysis undertaken across a number of large-scale NSW marinas has identified considerable regional benefit accruing from the marina developments investigated, particularly in relation to economic and tourism development. Similarities between the Trinity Point proposal and the marina case-studies suggest similar benefits potentially emerging for Lake Macquarie.

## SOCIAL IMPACTS

This Social Impact analysis concludes that Trinity Point proposal has the potential to deliver net social and economic benefits to the Morisset District, Lake Macquarie LGA and the Lower Hunter region. Potential for negative social and community impacts, particularly changes to local amenity and character and increases in traffic, are identified but primarily limited to the local level, and need to be viewed in context of the emerging shift in local urban form, diversified population growth emerging from new release residential areas, and shifting expectations and aspirations of incoming residents and visitors to the area.

The long and varied cultural history of Trinity Point is likely to have generated multiple and possibly competing meanings regarding the site for a number of social groups. On a local individual resident level, social impacts emerging from the proposal may be perceived as positive or negative, according to personal aspirations and expectations for lifestyle and environment. On a wider Lake Macquarie resident level, attitudes and experiences of the proposal are more likely to be informed by recreational, economic and environmental factors.

The proposal intends to enhance and diversify public access to the Trinity Point foreshore and contribute to Council's aims of enhancing opportunities for lakeside recreation. The Proposal's inclusion of dedicated community areas and public access features increases its potential to deliver positive community impacts, both locally and regionally. Café, picnic areas and function rooms enable informal and formal meeting space, and assist integration between on-site residents, visitors and residents external to site.

## SUMMARY OF SOCIAL IMPACTS

SOCIAL IMPACT	
<b>POPULATION CHANGE</b>	<ul style="list-style-type: none"> <li>Population increase of approximately 140 permanent residents, and similar numbers of seasonal temporary residents.</li> <li>New population likely to have low proportion of children and lower socio-economic groups.</li> <li>Recreational infrastructure likely to diversify demographics/aspirations of incoming residents to other Morisset park residential developments.</li> <li>Population growth needs to be assessed in light of cumulative growth in area.</li> </ul>
<b>SOCIAL INFRASTRUCTURE</b>	<ul style="list-style-type: none"> <li>Provision of high end residential, tourism, marina and recreational infrastructure.</li> <li>Needs of residents to be considered in cumulative planning for District, i.e. within context of 5000 new residents for Morisset and Cooranbong.</li> <li>Proposal includes traffic and hard infrastructure upgrades.</li> <li>Provision of range of formal and informal meeting areas, e.g. picnic areas, cafes, function rooms</li> <li>Enhanced and diversified public access to lake.</li> </ul>
<b>ACCESS AND MOBILITY</b>	<ul style="list-style-type: none"> <li>Proposal includes road design to enable bus and coach connections.</li> <li>Design adheres to disability and universal access standards.</li> <li>Boardwalking increases and diversifies public access to lake,</li> <li>Helicopter and marina facilities diversify transport modalities</li> <li>Public transport limited in area - increased residential and tourism population increase viability of routes.</li> </ul>



<b>COMMUNITY IDENTITY AND INTEGRATION</b>	<ul style="list-style-type: none"> <li>Onsite social infrastructure, e.g. picnic sites, boardwalking, commercial areas, public spaces, provides opportunity for social interaction between new residents, and new and existing residents.</li> <li>Existing residents may have fears re changes to community character.</li> <li>Proposal includes connectivity/lake access between existing residents and the lake</li> <li>Design responds to local identity, history and vegetation.</li> </ul>
<b>LOCAL AMENITY</b>	<ul style="list-style-type: none"> <li>Increased noise, vibration, dust and traffic during construction.</li> <li>Existing residents may have fears re loss of character</li> <li>Changes to amenity need to be viewed in light of wider intended residential urbanisation of area.</li> <li>Design sympathetic to local surroundings.</li> </ul>
<b>ECONOMY AND EMPLOYMENT</b>	<ul style="list-style-type: none"> <li>Provision of 810 FTE jobs during construction phase</li> <li>Provision of 60 FTE jobs in operational phase</li> <li>Increased residential/tourism spending within Morisset Planning District shopping centres, and wider region.</li> <li>Multiplier effects, including increased local consumption from increased employment and trade.</li> <li>Village centres is not considered to present competition to other shopping areas.</li> <li>Comparison with similar marinas suggest local and regional benefits</li> </ul>
<b>COMMUNITY SAFETY</b>	<ul style="list-style-type: none"> <li>Increased road traffic may impact upon road safety. increased pedestrian or bicycle measures may decrease public safety, especially for children</li> </ul>
<b>NEEDS OF PARTICULAR GROUPS</b>	<ul style="list-style-type: none"> <li>Families with Children - provision of recreational opportunities, increased access to lake (boardwalk for prams etc), housing choice (i.e. 3 bdrm apartment dwellings)</li> <li>Older people - social / recreational/ housing choice</li> <li>People with disability - boardwalking, lake access</li> </ul>

## CONCLUSION

On balance, this report concludes that the Trinity Point proposal has the potential to deliver net social and economic benefits to the Morisset District, Lake Macquarie LGA and the Lower Hunter region. Benefits will be delivered primarily at a District, LGA and regional level, and include economic, recreational and tourism related impacts. Potential negative impacts are likely to be limited primarily to the immediate local area, and relate generally to community responses relating to changes in amenity and character of the area.

Population related pressures on social infrastructure, such as schools and health services are not considered a significant issue specific to the proposal, but will need to be included in social infrastructure planning associated with cumulative local and district wide growth. On balance, social infrastructure needs emerging from the new population are likely to be balanced by the provision of high-end recreational, commercial and tourism infrastructure. Separate reference to other expert reports such as traffic are particularly important in considering impacts on hard infrastructure such as the local road system.

Community consultation has identified considerable community support for the proposal, but also local concern regarding helicopter noise and the scale of development, particularly relating to the marina. It is likely that if the scale of the marina was reduced, or at least carefully staged with a schedule of measures to assess impact before proceeding to next stage, then existing concern within the local community would be significantly reduced.

# 1. INTRODUCTION

## 1.1 OVERVIEW

This social and economic assessment evaluates the likely social impacts related to the proposed Trinity Point Marina and Mixed Use Resort development/concept plan (‘the Proposal’ ‘the Project’, ‘the Concept Plan’) in the Morisset Peninsula. The Proposal includes the provision of a 300 berth marina and associated boat repair facilities, a Village Centre development incorporating retail, café, and function facilities, 75 tourist apartments and 75 residential apartments. It is understood that the entire proposal is being considered under Section 3A planning legislation as a Concept Plan.

## 1.2 METHODOLOGY

Key Insights has considered social and economic issues arising from the Director General Requirements, as well as broader socio-economic impact themes that will assist Lake Macquarie Council in its deliberation regarding support of the proposal, and the Department of Planning in consideration of project approval.

Key Insights has undertaken the following key tasks:

- Document Review
- Demographic and community profile
- Social Infrastructure mapping and capacity analysis
- Economic overview, including comparative marina analysis
- Impact analysis
- Development of Recommendations

Social Impacts have been considered against standard SIA criteria, used commonly in local government sector, including Lake Macquarie Council.

## 2. THE PROPOSAL

### 2.1 THE PROPOSAL

The Trinity Point Marina and Mixed Use Resort proposal comprises

- Marina village - comprising 300 berth marina, village centre, boardwalk, breakwater, hardstand, workshop and helipad.
- Tourism accommodation - comprising approximately 75 apartments.
- Residential accommodation - comprising approximately 75x 2-3 bedroom apartments.
- Connective spaces - boardwalk and landscaped foreshore connecting areas of the development.
- Car parking - underground car park and surface parking.

### 2.2 SITE LOCATION

Figure 1 shows the location of the Trinity Point proposal. The site incorporates Lot 31, Part Lot 32 and Part Lot 33 DP 1117400.

**Figure 1: Site Location**



### 2.3 PROPOSED MARINA VILLAGE

The proposed Marina Village development consists of the breakwater, marina berths and management, boat maintenance facilities and commercial infrastructure including cafes, retail and convention facilities.

#### 2.3.1 Proposed Village Centre

The Village Centre is proposed to incorporate

- 2 x café
- 1 x restaurant,
- 3 x function rooms,
- Meeting rooms
- Commercial offices and retail,
- Public and marina amenities,
- Marina operations offices,
- Repair and maintenance workshop and offices
- Managers residence (apartment).

It will be further detailed in Building Structure Plan prepared for the Proposal.

### **2.3.2 Proposed Floating Berths, Breakwater, and Helipad**

The floating marina will include a 308 berth marina consisting of 4 arms of floating pontoons, a breakwater (with timber walkway) and helipad. The marina berths will have a staged construction with each arm as a separate stage, beginning construction with the southern portion of the breakwater and Arm A. An 80% permanent occupancy berthing rate will be the threshold for the each next arm of the marina to be constructed.

The floating berths are accessible via an elevated boardwalk connecting to the marina village.

It is proposed that the floating marina and breakwater boardwalk will be available to the public during the day. A security gate at the access gangway leading to the marina berths will be locked at night as a precaution against vandalism, property damage and theft. Public access to breakwater in immediate vicinity of helipad may be restricted during helicopter movements.

### **2.3.3 Proposed Repair and Maintenance facilities**

A hardstand area for boat maintenance and repair activities is proposed to be located adjacent to the workshop contained in the Marina Village. It could accommodate about 7-9 vessels at one time, and will be fenced for security.

### **2.3.4 Proposed Hours of Operation**

The proposed hours of operation are

Administration: 7 days a week - 8.00am to 6.00pm

Marina shop: 7 days a week - 8.00am to 6.00pm (subject to lessee)

Chandlery: 7 days a week - 8.00am to 6.00pm

Boat repairs: 7 days a week - 7.00am to 6pm Mon-Sat (open from 8.00am Sunday and Public Holidays)

Office tenancies: 9.00am to 5.00am Mon to Fri (subject to lessee)

Operating hours of the floating marina would be 7 days a week. Helicopter movements (to the) will be restricted to those times listed above for administration activities. Boat movements would be unrestricted.

## 2.4 PROPOSED SHORT TERM TOURISM ACCOMMODATION

Immediately to the south of the village centre, within Stage 1 planning area, short term tourist accommodation will be located. Building structures presenting opportunities for both resort and serviced apartment style lodging are proposed.

## 2.5 PROPOSED RESIDENTIAL ACCOMMODATION

The southern portion of the site (Stage 2) will incorporate residential apartment style yielding 30 three bedroom units, 37 four bedroom units and 8 penthouses.

The apartments will be connected to each other, the marine village and tourist accommodation sector through the foreshore reserve and boardwalk network.

The building clusters are similarly designed to the apartment style accommodation provided in the tourism accommodation sector of the proposal

The three building clusters and associated services and infrastructure form the area of the development being considered for Concept Plan Application.

## 2.6 PROPOSED CONNECTIVE SPACES

The Marina, Marina Village Centre and remainder of the Trinity Point tourist development are to be connected through a series of elevated timber decks and boardwalks, This network includes four jetty structures outside the Marina village Centre.

## 2.7 ACCESS AND PARKING

### 2.7.1 Vehicular Access and Parking

Approximately 200 car spaces are proposed to be included on the Marina Village and tourist accommodation site (i.e. project approval site) including 4 wheelchair accessible spaces.

### 2.7.2 Pedestrian

Pedestrian Access to the site would be via the boardwalk network within the development from the following areas:

- Lake foreshore reserve;
- Undercroft car park
- Street/boardwalk interfaces; and
- Associated residential development

### 2.7.3 People with Disabilities

The Proposal includes design elements to ensure compliance with the Building Code of Australia (Part D3) and AS 14281, including:

- Wheelchair accessible parking spaces
- Lift to gain access to upper levels of Marina Village Buildings
- Same level between workshop floor and adjacent hardstand area
- Wheelchair accessible toilet/shower facility

- Compliant ramp access between marina Village Buildings and boardwalk structures and between boardwalk structures and floating marine pontoons.
- Universal access consideration of ramps, handrails, walkways, kerb edges and tactile indicators. Where possible, universal access shall be provided to foreshore and bushland areas.

Further details are to be included at the construction certificate stage.

## 3. PLANNING AND POLICY

Whilst the Trinity Point proposal seeks consideration for approval under stage government planning process, it is important that it contributes and responds to local social and strategic planning. There are a number of relevant Lake Macquarie Council planning documents that cover the proposed development site. Salient points regarding social or community issues are referenced and analysed below.

### 3.1 LAKE MACQUARIE LIFESTYLE 2020 STRATEGY AND REPORT

Lifestyle 2020 is Lake Macquarie City Council's primary strategic document to inform overall vision and planning for the LGA until 2020. The Plan is based on the core values of sustainability, equity, efficiency and livability. It is informed by a draft planning report which includes consideration at a Planning District level.

#### Morisset Planning District

According to Lifestyle 2020, the intended pattern of urban settlement in the Morisset Planning District is to encourage urban growth within larger settlements, predominantly Morisset. Neighbourhoods on the Morisset Peninsula are intended to continue to support Bonnells Bay Local Centre, which will in turn be strengthened by mixed use and medium housing development close to its centre.

The draft Lifestyle 2020 report identifies rural, natural and cultural landscapes as playing an important part in the District, including lakeside areas. Consultation informing the plan found that natural amenity, village characteristics and a strong sense of community are highly valued by residents and visitors and need to be preserved for future generations.

Future economic opportunities for the District focus on building on the lifestyle and environmental assets of the area, including tourism.

The Trinity Proposal is well located, both physically and strategically, to contribute to strengthening the roles of Morisset town centre and Bonnells Bay local centre, and delivering economic, lifestyle and tourism opportunities to the District and wider LGA.

#### Overall Strategic Directions

Strategic directions set out in the Plan for achievement across the LGA, and the contribution/interaction of the Proposal to such, are presented in Table 1 below.

**Table 1 Contribution to Council's Lifestyle 2020 Strategic Directions**

STRATEGIC DIRECTION	PROJECT RESPONSE/CONTRIBUTION TO STRATEGY
CITY RESPONSIVE TO ITS ENVIRONMENT	<p>Enhances public connectivity to lake</p> <p>Includes connectivity to green spaces within and beyond site borders</p> <p>Design responds to social and ecological need associated with lake edge</p> <p>Design draws upon site specific cultural and ecological themes</p> <p>Incorporates eco sensitive marine design</p>

WELL SERVICED AND EQUITABLE CITY	Contributes to local and LGA residential, recreational and commercial infrastructure.  Increases local viability of facilities and services, including critical mass necessary for Council provisions.
WELL DESIGNED AND LIVEABLE CITY	Incorporates a range of uses, forms and lifestyle choices.  Design includes series of community spaces and walkways
CITY OF PROGRESS AND PROSPERITY	The Proposal continues the desired trend of mixed land uses  World class marina tourism recreational facility  Follow on economic impacts
EASILY ACCESSIBLE CITY	Increases accessibility to air and water as well land (although access restricted to the wealthy)  Increases viability of roadworks and public transport to Peninsula  Disabled access - design includes range of accessibility measures including easing of disabled gradients, ramps and elevator facilities.

## 3.2 LAKE MACQUARIE SOCIAL PLAN 2005 - 2007

Lake Macquarie's Social Plan aims to investigate and respond to the social needs and aspirations of people living and working in the Lake Macquarie LGA. The Principles underlying the Social Plan are:

- o Equity - the need for fairness in distribution of resources, particularly for those in need.
- o Access - that all people should have fair access to economic resources, services and rights essential to improving quality of life.
- o Participation - all people to have the maximum opportunity to participate in decisions that affect their lives.
- o Rights - equality of rights so discriminatory practices can be avoided.

The Social Plan takes a 'theme-based' approach to planning. Thematic areas, specific issues discussed and implications for the Trinity Point proposal are set out in Table 2 below.

**Table 2 Social Plan Issue and Implications for Proposal**

CHAPTER	ISSUES IN SOCIAL PLAN	IMPLICATIONS FOR PROPOSAL
HOUSING	Negative social Impact of rapid population growth and new development, including commuter suburbs and the affect on infrastructure planning.  Housing affordability	Proposal population growth not significant to stress resources.  Community, commercial and recreational inclusions increase local infrastructure for Morisset Park population growth.  No affordability provision included
EDUCATION AND EMPLOYMENT	Casualisation of the workforce Feminisation of the workforce Lack of jobs in LGA at upper end of occupational spectrum	Range of jobs provided during construction and operation, across all levels of occupation within industries of hospitality, tourism, maritime, construction, etc..  Hospitality/tourism jobs likely to be casual,



CHAPTER	ISSUES IN SOCIAL PLAN	IMPLICATIONS FOR PROPOSAL
		<p>but casual jobs often associated with flexibility.</p> <p>Feminisation has issues for childcare for workers - but this is considered nominal in light of small number of jobs generated.</p>
HEALTH	<p>Links between lower socio-economic indicators and lower health.</p> <p>Increasing rates of obesity</p> <p>Need for healthy ageing</p> <p>Access to health care, including GP shortages and lack of bulk-billing.</p>	<p>Incoming residents are not anticipated to exhibit lower socio-economic indicators due to pricing and target market.</p> <p>Proposal well located for active, semi-pedestrian lifestyle and range of outdoor recreational activities.</p> <p>Population growth not considered sufficient to stress local health resources (in light of significant growth and necessary health response for District).</p>
TRANSPORT	<p>Importance of transport to quality of life.</p> <p>Links between lack of transport and isolation with lower levels of wellbeing.</p> <p>Transport disadvantage - defined by factors such as mobility, isolation and age.</p> <p>Lake Mac's dispersed pattern of settlement fosters reliance on cars.</p> <p>Public dissatisfaction with local bus transport</p>	<p>Proposal includes considerable car parking for residents and visitors.</p> <p>Proposal increases local traffic modalities i.e. helicopter and boat.</p> <p>Limited public transport locally, although Morisset well connected via train.</p> <p>Community may perceive transport issues for peninsula (one road in, one road out)</p> <p>Opportunities for viable shuttle bus due to tourist trade (will also benefit residents).</p>
COMMUNITY SAFETY	<p>Broad approach to crime prevention and 'quality of life' issues.</p> <p>Community safety ranked highest importance in Community Surveys</p> <p>Social objectives to</p> <ul style="list-style-type: none"> <li>o Reduce rate of crime</li> <li>o Reduce fear of crime</li> <li>o Facilitate relationships between diverse groups to break down fear producing stereo types</li> <li>o Enlist community support</li> </ul> <p>Challenging stereotypical perceptions of young people as "trouble makers"</p>	<p>Crime Risk report being undertaken</p> <p>CPTED principles (Safety by Design) to be assessed and applied.</p> <p>Opportunity for crime prevention strategy that includes special attention to building links across age groups.</p> <p>Opportunity for community and recreational measures to include community participation and public life</p> <p>Need for active maintenance program, including rapid response team for addressing vandalism and graffiti.</p> <p>Tensions may emerge from unclear definition of public and private property and space, and competing priorities of user groups, e.g. existing residents, new residents, tourists, age groups, differing level of affluence /expectation.</p>
COMMUNITY FACILITIES	<p>Community facilities issues include funding, partnerships, planning, maintenance, management and usage.</p> <p>Existing LMCC community buildings house a variety of community organizations and provide meeting spaces for the public and interest groups.</p>	<p>'Public' spaces linked with commercial spaces, and to be managed via commercial interests.</p> <p>Provision of social infrastructure benefits existing residents and future residents of nearby new release area.</p> <p>Village centre design fosters hub for integration between user groups, including new and existing residents.</p>
CULTURE	<p>The concept of culture informing the Social Plan includes:</p> <ul style="list-style-type: none"> <li>o Respecting and celebrating</li> </ul>	<p>Design has been informed by local cultural consideration including previous site uses and local aboriginal history</p>

CHAPTER	ISSUES IN SOCIAL PLAN	IMPLICATIONS FOR PROPOSAL
	<p>cultural diversity and harmony within the community</p> <ul style="list-style-type: none"> <li>o Developing identity through a sense of place</li> <li>o Promoting cultural industries and cultural development.</li> </ul>	Opportunity to include gallery space for local artists and partnering with local schools and art departments.

### 3.3 LAKE MACQUARIE SECTION 94 CONTRIBUTIONS PLAN -CITY WIDE, RESIDENTIAL (2004)

Councils Section 94 plan applies to most areas for the city, including Trinity Point. It sets out Council's plan to levy developer contributions and allocate funds to specific purposes relating to:

- Open space and recreation
- Community facilities
- Roadworks and Traffic Management
- Drainage, Stormwater and Water Control
- Management.

Table 3 summarises the rationale informing the "Open Space and Recreation" and "Community Facilities" components of the Plan, and identifies provisions intended for Morisset area.

**Table 3 Section 94 Plan City Wide - Open space, Recreation and Community Facilities**

CHAPTER	RATIONAILE	PROPOSED MORISSET PROVISIONS
OPEN SPACE AND RECREATION	<p>Finite amount of open space available.</p> <p>Population growth increases demand. Reasonable for incoming population to contribute to open space.</p> <p>Proposed facilities may not be able to be located in immediate proximity of development.</p> <p>Traveling and transportation to sport and recreation is considered reasonable.</p> <p>Need for economies of scale, multiple uses and shift from quantity to quality.</p> <p>Foreshore development and lakeside pedestrian linkages are major focus of future recreation provision.</p> <p>Open space and recreation has health and wellbeing benefits for individuals, and economic benefits from tourism, recreation provision, increased aesthetic value and increased land values.</p> <p>Council will not duplicate private provisions</p>	<p>New sporting facilities to be developed on the Morisset Peninsula - these likely to include at least 2 ovals, netball courts, and BMX track.</p> <p>Bonnells Bay Bicycle track connecting key areas, such as School, Shopping centre, or new sporting facilities.</p> <p>Development of Foreshore Park at Lakeview Road, Morisset Park.</p> <p>IMPLICATIONS</p> <p>Provision at Trinity Point decreases Council's need to provide local recreational spaces.</p> <p>May be perceived loss of open space, however, land is not currently publicly available.</p>
COMMUNITY FACILITIES	<p>Preference for larger central location of facilities, rather than smaller and dispersed.</p> <p>Preference for flexible multipurpose facilities</p> <p>Preference for specialization of functions, according to emerging demand.</p> <p>Issues associated with management</p>	<p>Bonnells Bay Youth and Community Centre</p> <p>Morisset Multipurpose and Health Centre</p> <p>Morisset Childcare centre</p>

CHAPTER	RATIONAILE	PROPOSED MORISSET PROVISIONS
		<p>Morisset Library extensions.</p> <p>IMPLICATIONS Council rationale to centralize community facility provision in Morisset.</p> <p>On-site function centres provide alternative meeting and community space.</p>

# 4. DEMOGRAPHIC PROFILE

## 4.1 GEOGRAPHIC AREAS OF INFLUENCE

The profiles provided below will be primarily based upon Australian Bureau (ABS) 2006 Census data. The data will be supplemented, where appropriate, from other sources including other ABS publications, the Australian Taxation Office, employment data from the Department of Employment and Workplace relations and data published by the Hunter Valley Research Foundation.

The following profile will evaluate three levels of analysis for Trinity Point which will capture the region's broader context and the finer characteristics of its immediate suburban identity. The three levels of analysis are marked on the map, below.



Figure 2: Geographic Areas of Interest

These populations will be compared both with NSW and Lake Macquarie for the purposes of context.

Morriset Park: This profile corresponds with the ABS's "Morisset Park" state suburb profile. It represents the immediate residential vicinity of the proposed Trinity Point development.

Morriset Peninsula: This profile consists of 7 ABS state suburbs including Morisset Park and corresponds with Lake Macquarie City Council's profile of "Morisset Peninsula" within the Morisset Planning District and planning documents such as Lifestyle 2020.

Morriset Planning District: This profile consists of more than 30 ABS CCDs, and corresponds with Lake Macquarie City Council's "Morisset Planning District". This profile contains four main population centres: Morisset, Morisset Peninsula, Cooranbong and Wyee. Morisset Peninsula has experienced strong population growth in recent years, while Wyee, Morisset and Cooranbong have been identified by Council and state planning strategies for population growth in coming years.

## 4.2 POPULATION GROWTH

Figures compiled from the 2001 and 2006 Census indicate that population growth has been particularly strong in the Morisset Park, Morisset Peninsula and Morisset Planning District areas as illustrated in the following table.

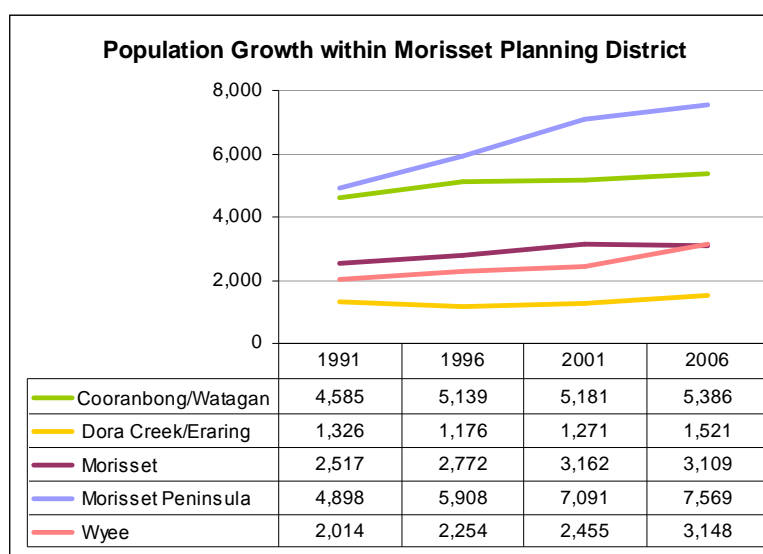
**Table 4: Population Growth in Areas of Interest**

	Morriset Park	Morriset Peninsula	Morriset Planning District	LGA	NSW
2001	711	7,091	19,160	177,185	6,311,168
2006	781	7,569	20,734	183,140	6,549,177
Growth	9.8%	6.7%	8.2%	3.4%	3.8%

Further, using data compiled from the 2006 Census and from previous Census data analysed by Lake Macquarie City Council it is clear that the strongest area of growth in the Morisset Planning District has been in the Morisset Peninsula (see following figure).

In the 15 years between 1991 and 2006, the Morisset Peninsula population increased significantly with 2,671 people moving into the area, however population growth has slowed slightly in the last 5 years as seen in the figure below.

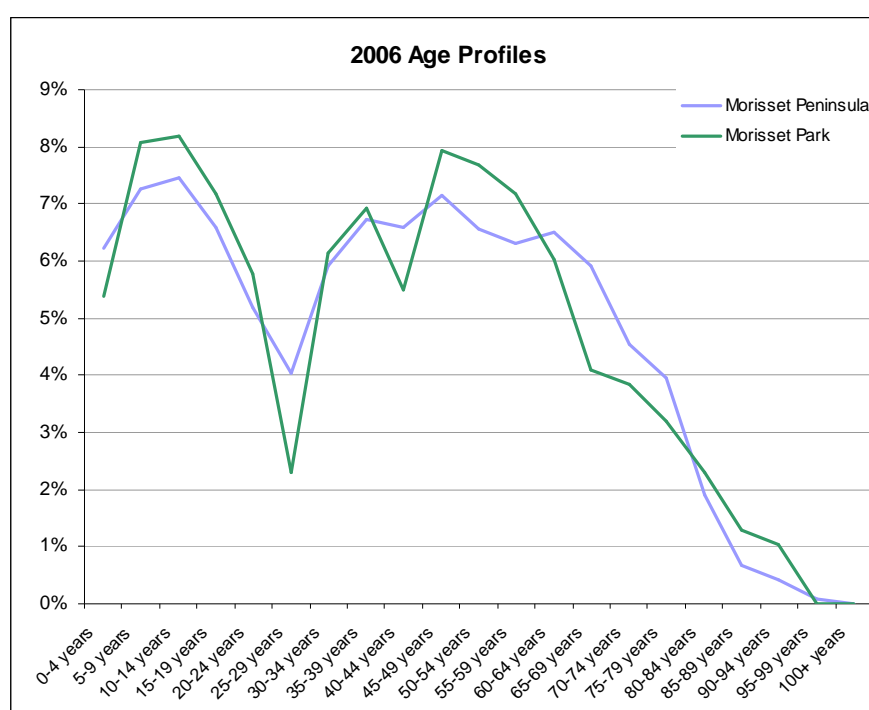
In contrast, population growth in Wyee has risen dramatically between 2001 to 2006, with the remaining areas of Morisset Planning District (Morisset Township, Dora Creek-Eraring and Cooranbong/Watagan) showing minimal changes over the previous 5 years.



**Figure 3: Population Growth in Morisset Planning District**

### 4.3 AGE

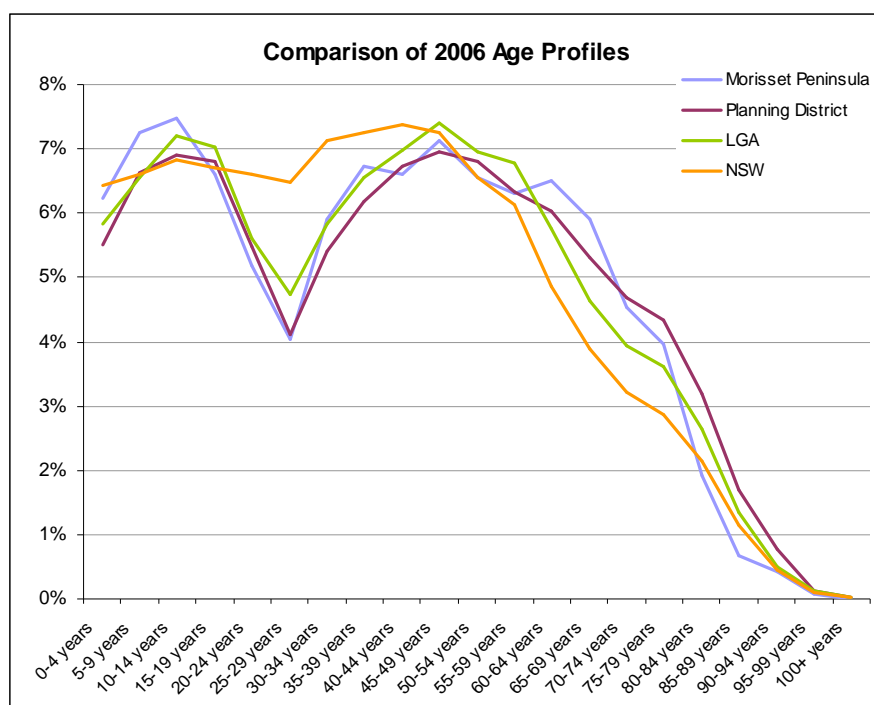
In 2006, 7,634 people resided in Morisset Peninsula with 781 people (or 10.2% of the population) coming from Morisset Park. The age profile of Morisset Park roughly parallels that of Morisset Peninsula, although it is considerably more volatile due to its smaller population size as is evident in the following figure.



**Figure 4: Morisset Park and Morisset Peninsula 2006 Age Profiles**

These populations display similar patterns to the broader Morisset Planning District and Lake Macquarie LGA populations, except that they are marginally older - represented by a smaller proportion of residents in their working years (20-50 years), and a higher proportion in the age brackets above 50 years (see following figure). This is further supported by the finding that the

**median ages of all areas of interest are higher than the NSW average;** Morisset Peninsula and Lake Macquarie LGA, 40 years, Morisset Planning District 42 years and NSW 37 years.



**Figure 5: Age Profiles**

The fall in the proportion of residents aged 15 to 29 years is a common finding in areas away from larger metropolitan cities. Residents in this age bracket tend to leave for one of two reasons; either for educational purposes or to pursue work in a larger city centre. **In contrast to the fall in 15 to 29 year olds, there is an influx of residents aged between 45 and 64 years.** These people are presumably attracted to the facilities and amenities of the lakeside area, either prior to and during their retirement years.

Better illustrating the differences in age profiles is data presented in the following table. Whilst Morisset Park and Morisset Peninsula have proportionally fewer residents aged between 15 and 44 than the NSW average, these areas also have proportionally more residents younger than 15 years of age and older than 45 years.

**Table 5: Age Breakdown of Areas of Interest**

Age Bracket	Morisset Park	Morisset Peninsula	Morisset Planning District	LGA	NSW
0-14 years	21.6%	20.9%	19.0%	19.6%	19.8%
15-44 years	33.8%	35.1%	34.7%	36.7%	41.5%
45-64 years	28.8%	26.5%	26.1%	26.9%	24.8%
65+ years	15.7%	17.5%	20.1%	16.8%	13.8%

## 4.4 HOUSING

### 4.4.1 Household Size

Across the subject populations, the average ratio of persons per dwelling is quite similar - between 2.5 and 2.7 persons per private dwelling - however there is some variability between the ratios and the various dwelling types (see following table). For example, the ratio of persons to 'separate houses' varies from 2.54 in Morisset Peninsula to 2.84 across NSW. This can be explained primarily by the older age profile of Morisset Peninsula residents; older residents are more likely to live in couple-only households, reducing the average number of persons per dwelling. Differences between other dwelling type ratios can partially be explained by the scarcity of certain types of housing. For example in Morisset Peninsula there were just 13 'flat, unit or apartments' compared with 2,791 'separate houses'.

**Table 6: Persons per Dwelling**

	Morisset Park	Morisset Peninsula	Morisset Planning District	LGA	NSW
Persons	743	7,150	18,870	172,549	6,051,421
Total occupied private dwellings	277	2,819	7,465	67,443	2,328,217
Average Persons per dwelling type:					
Separate house	2.73	2.54	2.66	2.69	2.84
Semi-detached, row or terrace house, townhouse etc.	1.00	1.53	1.67	1.80	2.26
Flat, unit or apartment:	1.67	1.38	1.66	1.56	1.56
<i>Total</i>	<i>2.68</i>	<i>2.54</i>	<i>2.53</i>	<i>2.56</i>	<i>2.60</i>

It is worth noting that the figures depicted in the table above are widely predicted to fall over the medium term as the population ages and family structures continue to change. The ABS projects average household size in Australia to decline from 2.6 people per household in 2001 to between 2.2 and 2.3 people per household in 2026<sup>1</sup>. Lake Macquarie City Council's Lifestyle 2020 projects an LGA average household size of 2.3% by 2020.

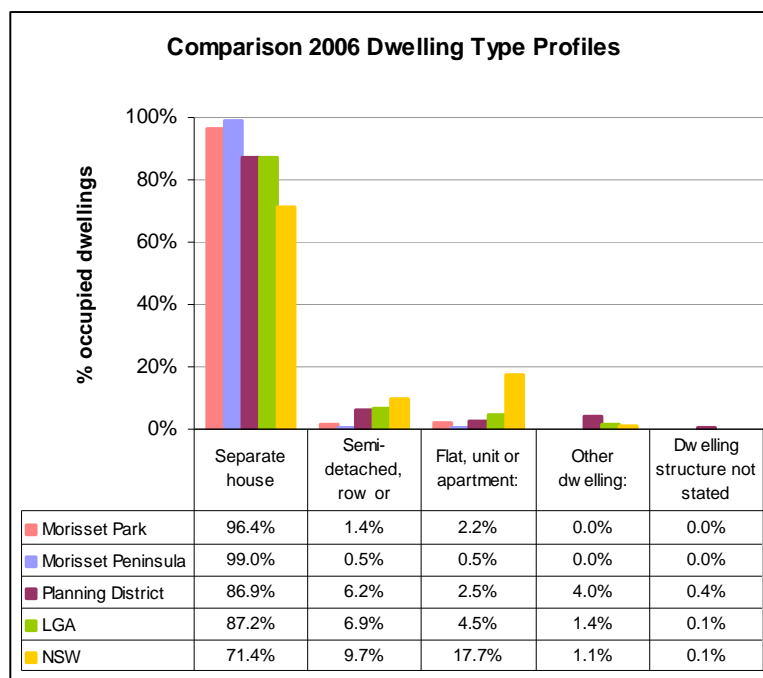
### 4.4.2 Dwelling Types

Figure 6 shows the proportion of different dwelling types across the subject populations. Clearly, 'separate houses' are the dominant form of housing in each area, accounting for between 71% and 99% of dwellings in the different areas. Morisset Park and Morisset Peninsula have exceptionally

<sup>1</sup> ABS Household and Family Projections 2001 - 2026. 3236.0. p. 1.



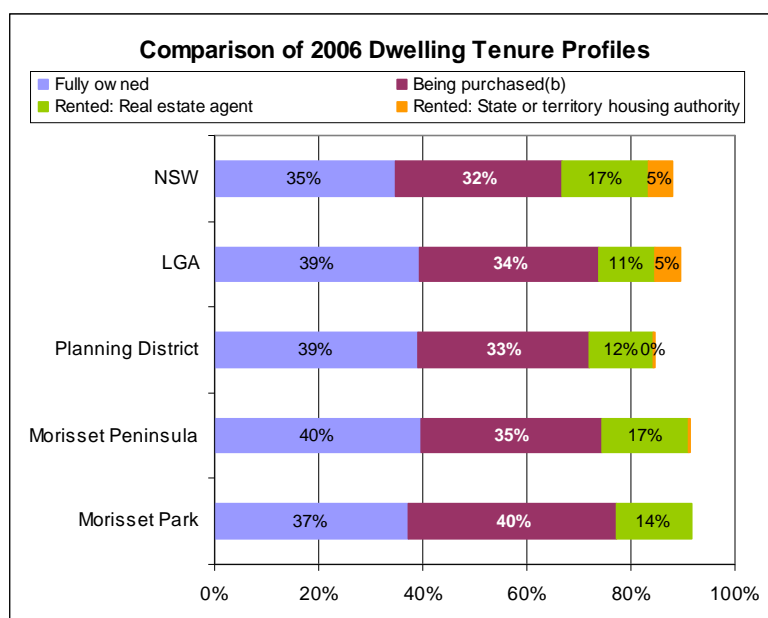
high proportions of 'separate houses' whilst the trend is less strong across Morisset Planning District, Lake Macquarie LGA and NSW.



**Figure 6: Dwelling Type Profiles**

#### 4.4.3 Housing Tenure

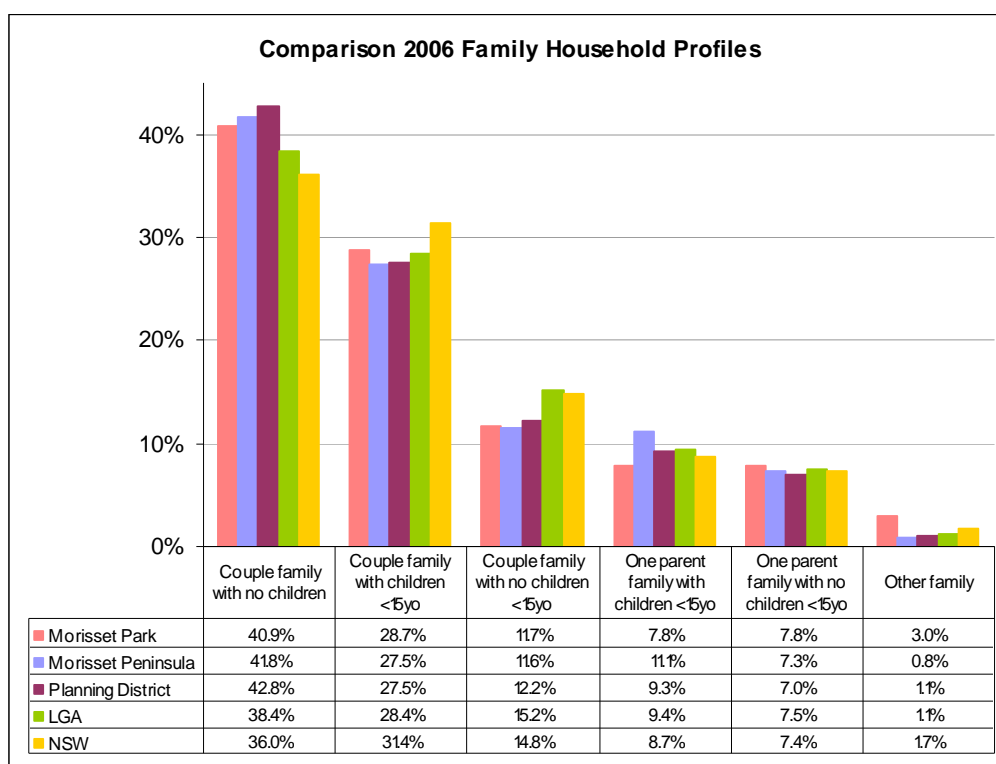
Figure 7 shows the tenure type for occupied private dwellings in the subject areas. Across all areas, the most dominant arrangement is for people living in a dwelling fully owned by one of the occupants. Morisset Park shows a higher proportion of dwellings being purchased (40%) than across Lake Macquarie LGA (34%). This corresponds with a smaller proportion of dwellings in Morisset Park either fully owned (37%) or being rented (14%) than across Lake Macquarie LGA (39% and 16% respectively). There were no State Housing Authority rental properties in Morisset Park, and only 7 of Lake Macquarie LGA's 3,372 State Housing Authority properties were found in Morisset Peninsula.



**Figure 7: Housing Tenure Profiles**

## 4.5 HOUSEHOLD AND FAMILY STRUCTURES

Figure 8 shows the relative proportions of different family types across the subject populations. Predictably, the Morisset Peninsula and Morisset Planning District, with their high proportion of older residents have relatively higher proportions of 'couple family with no children'.



**Figure 8: Household Family Structures**

Table 7 provides a further breakdown of the proportional representation of residents in private dwellings by relationship within the household. 'Husbands or wives in registered' or '*de facto* marriages' make up a larger proportion of residents in Morisset Park than across the other subject populations. This is compensated for in other areas: Morisset Park has a smaller proportion of 'lone person', and 'group households'.

**Table 7: Relationship in Household**

	Morisset Park	Morisset Peninsula	Morisset Planning District	LGA	NSW
Husband or wife in registered marriage	42.7%	41.9%	42.5%	42.0%	39.7%
Partner in de facto marriage(b)	7.6%	6.6%	5.7%	5.8%	6.1%
Lone parent	4.9%	5.6%	4.8%	5.0%	4.6%
Child under 15	21.3%	20.8%	19.8%	19.8%	20.2%
Dependent student (Aged 15-24 years)	5.5%	4.3%	4.3%	4.9%	5.0%
Non-dependent child	6.1%	6.0%	6.4%	7.2%	6.9%
Other related individual	1.6%	1.7%	1.8%	1.7%	2.3%
Unrelated individual living in family household	0.8%	0.6%	1.0%	0.7%	0.8%
Group household member	1.2%	1.4%	1.7%	1.7%	3.0%
Lone person	6.0%	8.3%	9.3%	9.1%	9.5%
Visitor (from within Australia)(c)	2.2%	2.7%	2.6%	2.0%	2.0%

## 4.6 EDUCATION

### 4.6.1 Educational Attendance

Table 8 provides a breakdown of educational attendance across the subject areas. Interestingly, Morisset Park has a higher level of educational attendance than the broader areas of Morisset Peninsula, Morisset Planning District and Lake Macquarie LGA. Only the NSW average is higher.

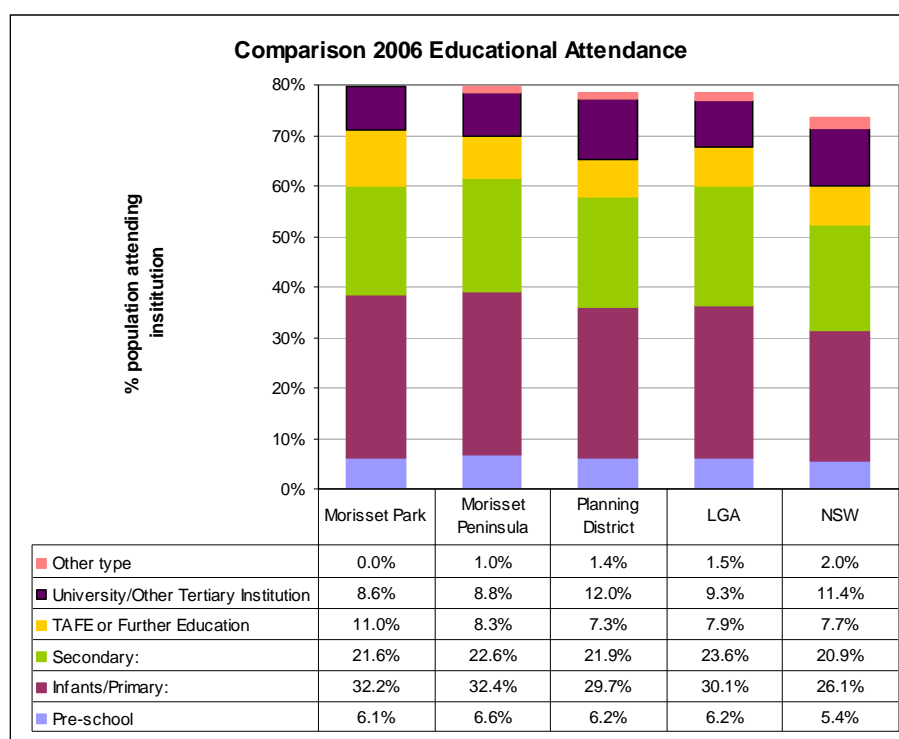
**Table 8: Breakdown of educational attendance**

	Morisset Park	Morisset Peninsula	Morisset Planning District	LGA	NSW
Residential Population	781	7,569	20,734	183,139	6,549,178
Attending educational institution	245	2,160	6,081	53,729	2,099,904
% of residents attending educational institution	31.4%	28.5%	29.3%	29.3%	32.1%

As depicted in the following figure, the distribution of Morisset Park and Morisset Peninsula residents attending pre-school, primary school and secondary school is higher than the state-wide average, reflecting higher numbers of children in the 5-9 years, 10-14 years and 15-19 years brackets.

Predictably, the areas of Morisset Park and Morisset Peninsula also had proportionally lower attendance of residents at 'University/Other institution' than the remaining areas of interest. This is most likely due to the emigration of student aged residents from Morisset to other areas of the state.

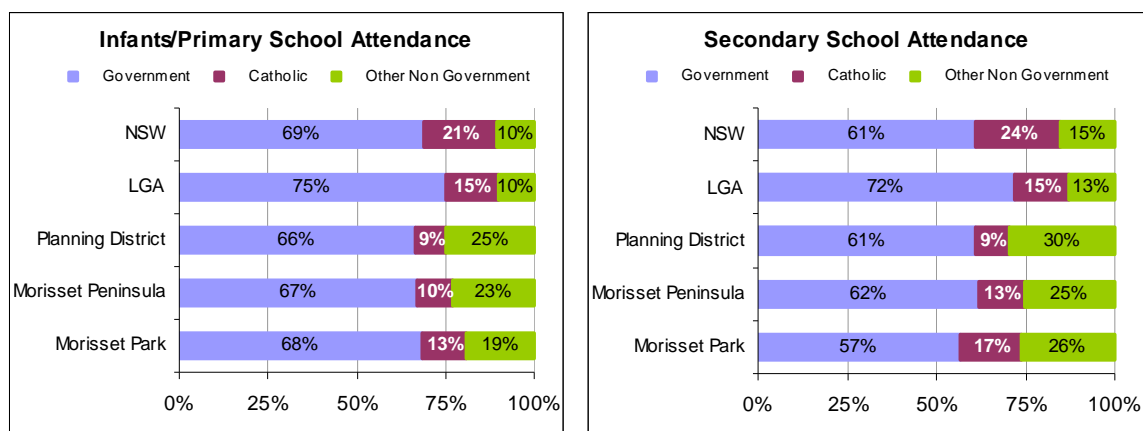
Conversely, the proportion of Morisset Park and Morisset Peninsula residents attending 'TAFE or Further education' is higher than both Lake Macquarie LGA and the NSW average. The explanation of this finding is likely to be based around two factors; the proximity of the Avondale College (Cooranbong, ~14km) and Hunter TAFE campus (Wyong, ~30km) and the high demand for skilled trades, where the value of a TAFE qualification in terms of employment is perceived more readily and the avenues of employment accessed by a university degree are not as immediately obvious.



**Figure 9: Educational Attendance Profiles**

Figure 10 shows secondary school attendance at government, Catholic and 'other non-government' schools for NSW, Lake Macquarie LGA, the Morisset Planning District, Morisset Peninsula and Morisset Park. Of note is the high proportion of attendance at 'other non-government' secondary school in all Morisset areas, but particularly in Morisset Planning District. Attendances at independent schools of figures like 20% are typically found in area such as

Sydney's eastern suburbs or Bayside Melbourne. As revealed in Figure 10 4, they are not typical of Lake Macquarie LGA.

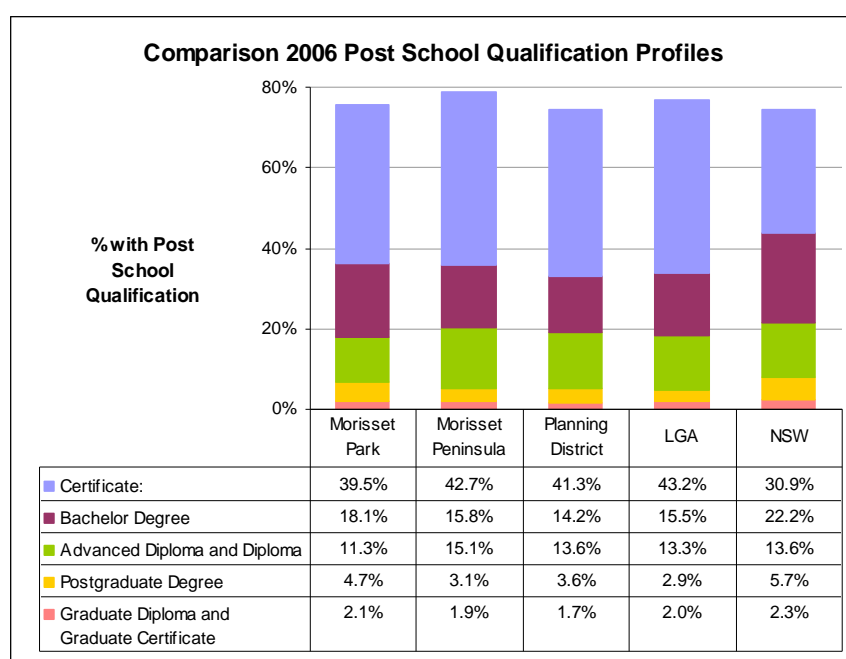


**Figure 10: Infants/Primary and Secondary School Attendance Profiles**

The reason appears to be the presence of Seventh Day Adventist primary and secondary schools at Cooranbong, north-west of Morisset. The area has been an Adventist enclave for more than a century. The percentage of residents declaring that they belong to the church is very high in Cooranbong, Dora Creek and on the Morisset Peninsula (particularly in Bonnell's Bay). Reinforcing the importance of the Adventist religion to residents in the Morisset Planning District are the latest Census figures which indicate that the number of residents belonging to this religion have increased by over 16%; from 2,202 in 2001 to 2,559 in 2006.

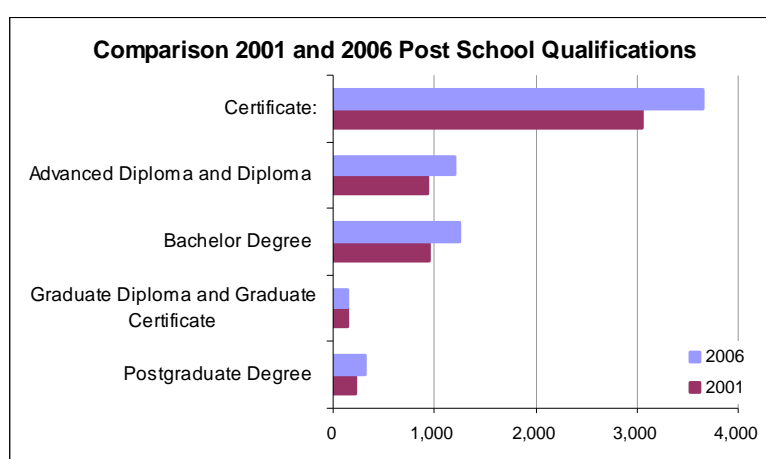
#### 4.6.2 Educational Attainment

The post-school educational attainment for all subject areas of interest reflects the educational attendance figures above (Figure 11). Certificate qualifications are far more widely held than graduate and post-graduate degree.



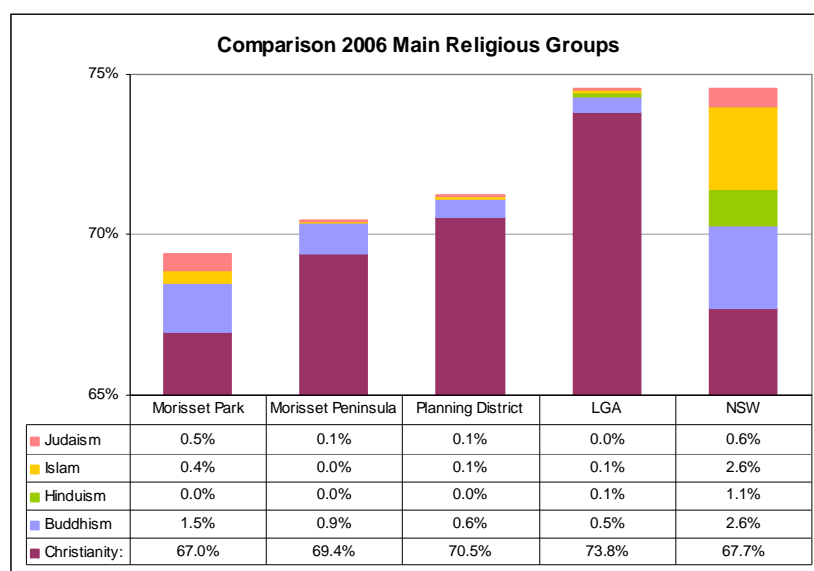
**Figure 11: Educational Attainment Profiles**

It should be noted that the educational attainments of a whole population typically reflects the historical levels of access to education. University education was not available at all in Newcastle until the 1960s and even then it was not widely accessible. Today in the Morisset Planning District, residents have access to the Adventist-run Avondale Campus which offers a range of undergraduate and postgraduate degrees, as well as vocational courses. More distant are the Wyong and Ourimbah campuses of the Hunter TAFE Institute, and the Ourimbah and Callaghan campuses of Newcastle University. Also, with the increased availability of degrees by correspondence and/or online courses, it would be expected that educational attainment will continue to increase across all populations in future Census collections. Changes in the Morisset Planning District level of post-school educational attainment between 2001 and 2006 are illustrated in the following figure.

**Figure 12: Morisset Planning District Educational Attainment 2001 and 2006**

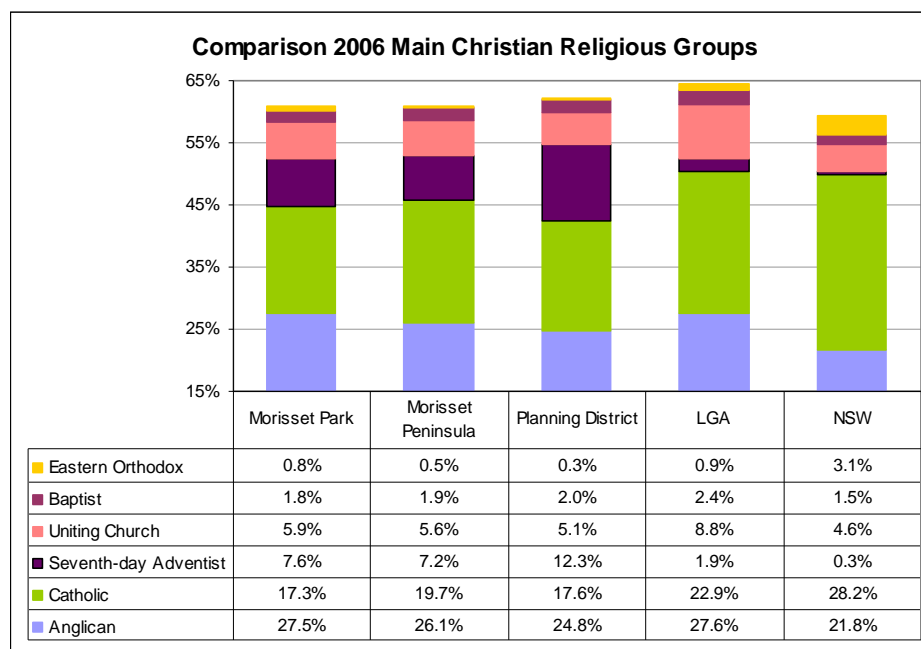
## 4.7 RELIGION

Figure 13 displays major religious beliefs across the subject populations. As is typical for non-metropolitan regions, very few Morisset and Lake Macquarie LGA residents are followers of non-Christian faiths. With the exception of Morisset Park residents, fewer than 1% of respondents reported following Buddhism, Islam or Hinduism. Across the state, these religions represented 2%, 2% and 1%, respectively.



**Figure 13 Selected Religions**

Closer examination of the Christian beliefs reveals that in Morisset Park, Morisset Peninsula, Morisset Planning District and Lake Macquarie LGA, there were proportionally more Anglicans than Catholics (Figure 14). This is in contrast to the NSW average where Catholic followers outnumber Anglican followers.

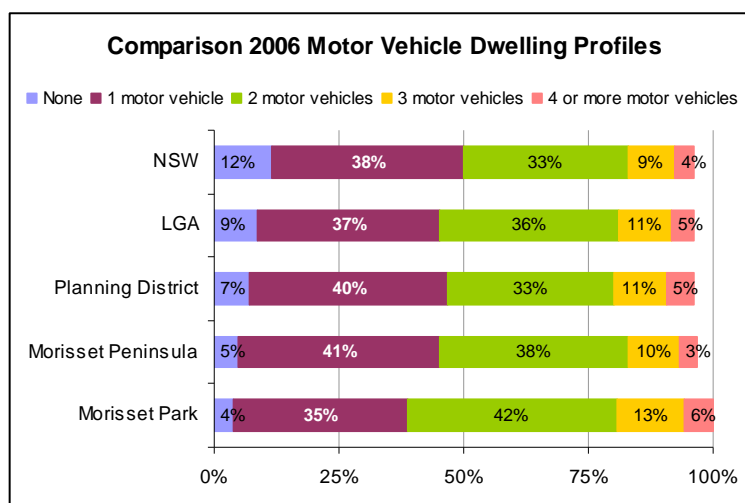


**Figure 14: Christian Religious Groups**

A high proportion of Seventh Day Adventists appears in the Morisset subject profiles (Morisset Park, Morisset Peninsula and Morisset Planning District). This is a result of the strong presence of Adventists in Cooranbong, with facilities such as the Seventh Day Adventist School, Church, College and Sanitarium factory. The populations of Dora Creek (Morisset Planning District) and Bonnells Bay (in the Morisset Peninsula and Morisset Planning District) also have a higher than average proportion of Seventh Day Adventists

## 4.8 TRANSPORT

Households in Morisset Park and Morisset Peninsula are more likely to have more motor vehicles (2 or more per dwelling) than all other subject areas (Figure 15). This is probably influenced by the inaccessibility to services and public transport by way of the rail line, and, partly, by higher household incomes.



**Figure 15: Motor Vehicle Ownership Profiles**

Table 9 shows the proportion of residents using different methods to get to work. The main mode of transport used by residents in Morisset Peninsula and Morisset Planning District varies slightly from that found across the broader area of Lake Macquarie LGA, in that the residents' reliance on private cars is less. In Morisset Peninsula, only 63% of people travel to work as a car driver, whilst across Lake Macquarie the figure was 67%. The result is that alternative travel arrangements are more common.

Workers from all of the Morisset areas of interest are 2 to 3 times more likely to catch the train to work than workers across Lake Macquarie. Workers in Morisset Park and Morisset Peninsula are also twice as likely to use 2 forms of transport to get to work - mainly train and car - than workers across Lake Macquarie.

**Table 9 Travel to Work**

	Morisset Park	Morisset Peninsula	Planning District	LGA	NSW
One method:					
Train	1.6%	2.5%	2.6%	0.7%	5.4%
Bus	0.0%	0.5%	0.3%	1.2%	3.4%
Ferry	0.0%	0.0%	0.0%	0.0%	0.2%
Tram (includes light rail)	0.0%	0.0%	0.0%	0.0%	0.0%
Taxi	0.0%	0.2%	0.1%	0.1%	0.3%
Car, as driver	65.5%	63.0%	61.2%	67.4%	56.4%
Car, as passenger	7.1%	5.8%	6.1%	5.9%	5.7%
Truck	2.2%	2.0%	2.6%	1.8%	1.6%
Motorbike/scooter	0.0%	0.5%	0.5%	0.6%	0.6%
Bicycle	0.0%	0.1%	0.5%	0.5%	0.7%
Other	0.0%	0.3%	0.4%	0.4%	0.5%



	Morisset Park	Morisset Peninsula	Planning District	LGA	NSW
Walked only	0.9%	1.2%	2.9%	1.8%	4.4%
TOTAL ONE METHOD	77.3%	76.1%	77.2%	80.4%	79.2%
Two methods: Train and:					
Bus	1.2%	0.3%	0.3%	0.1%	1.2%
Ferry	0.0%	0.0%	0.0%	0.0%	0.0%
Tram (includes light rail)	0.0%	0.0%	0.0%	0.0%	0.0%
Car, as driver	1.6%	1.4%	0.8%	0.3%	0.9%
Car, as passenger	0.0%	0.3%	0.3%	0.1%	0.4%
Other	0.0%	0.0%	0.0%	0.0%	0.1%
Total	2.8%	2.0%	1.4%	0.5%	2.6%
Bus and:					
Ferry	0.0%	0.0%	0.0%	0.0%	0.1%
Tram (includes light rail)	0.0%	0.0%	0.0%	0.0%	0.0%
Car, as driver	0.0%	0.0%	0.0%	0.0%	0.1%
Car, as passenger	0.0%	0.0%	0.0%	0.1%	0.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.2%	0.3%
Other two methods	0.0%	0.3%	0.4%	0.4%	0.4%
TOTAL TWO METHODS	2.8%	2.3%	1.9%	1.1%	3.3%
Three methods:					
Train and two other methods	0.0%	0.4%	0.3%	0.1%	0.3%
Bus and two other methods (excludes train)	0.0%	0.0%	0.0%	0.0%	0.0%
Other three methods	0.0%	0.1%	0.1%	0.0%	0.0%
TOTAL THREE METHODS	0.0%	0.5%	0.3%	0.1%	0.4%
WORKED AT HOME	3.4%	3.9%	5.2%	3.3%	4.8%
DID NOT GO TO WORK	14.6%	15.4%	13.3%	13.2%	10.5%
METHOD OF TRAVEL TO WORK NOT STATED	1.9%	1.7%	2.1%	1.8%	1.9%

Table 10, sourced from the Hunter Valley Research Foundation<sup>2</sup>, shows the work destination for Lake Macquarie workers. Clearly the dominant work sites are within the Newcastle-Lake Macquarie metropolitan area. The smallest significant percentage travels to the other Local Government Areas in the Lower Hunter - Cessnock, Maitland and Port Stephens.

**Table 10: 2001 Census - Work Destination for Lake Macquarie LGA Residents**

Within Lake Macquarie	45.8%
Newcastle (Remainder)	24.5%
Newcastle (Inner)	7.7%
Outside the Hunter	17.1%
Port Stephens	1.7%
Maitland	1.5%
Cessnock	1.1%
Singleton	0.4%

<sup>2</sup> HVRF. Newcastle and the Hunter Region 2005-2006, p 337,338

The surprising figure is the 17% who travel beyond the Hunter. The logical assumption is that their destination is the Central Coast or Sydney. From southern Lake Macquarie - either the eastern or western shore - the F3 freeway is easily accessible. Similarly along the western shore of Lake Macquarie (Fassifern, Dora Creek, Morisset) access to the public railway system is also easy.

## 4.9 EMPLOYMENT

### 4.9.1 Labour Market

Table 11 shows basic labour market outcomes for the subject areas. The Morisset Park profile reveals a similar labour market performance when compared to the NSW state average which is markedly stronger than the 2006 labour market performance of Morisset Peninsula, Morisset Planning District and Lake Macquarie LGA. Morisset Park has a lower unemployment rate, a slightly higher workforce participation rate and a slightly smaller proportion of full-time positions than Lake Macquarie.

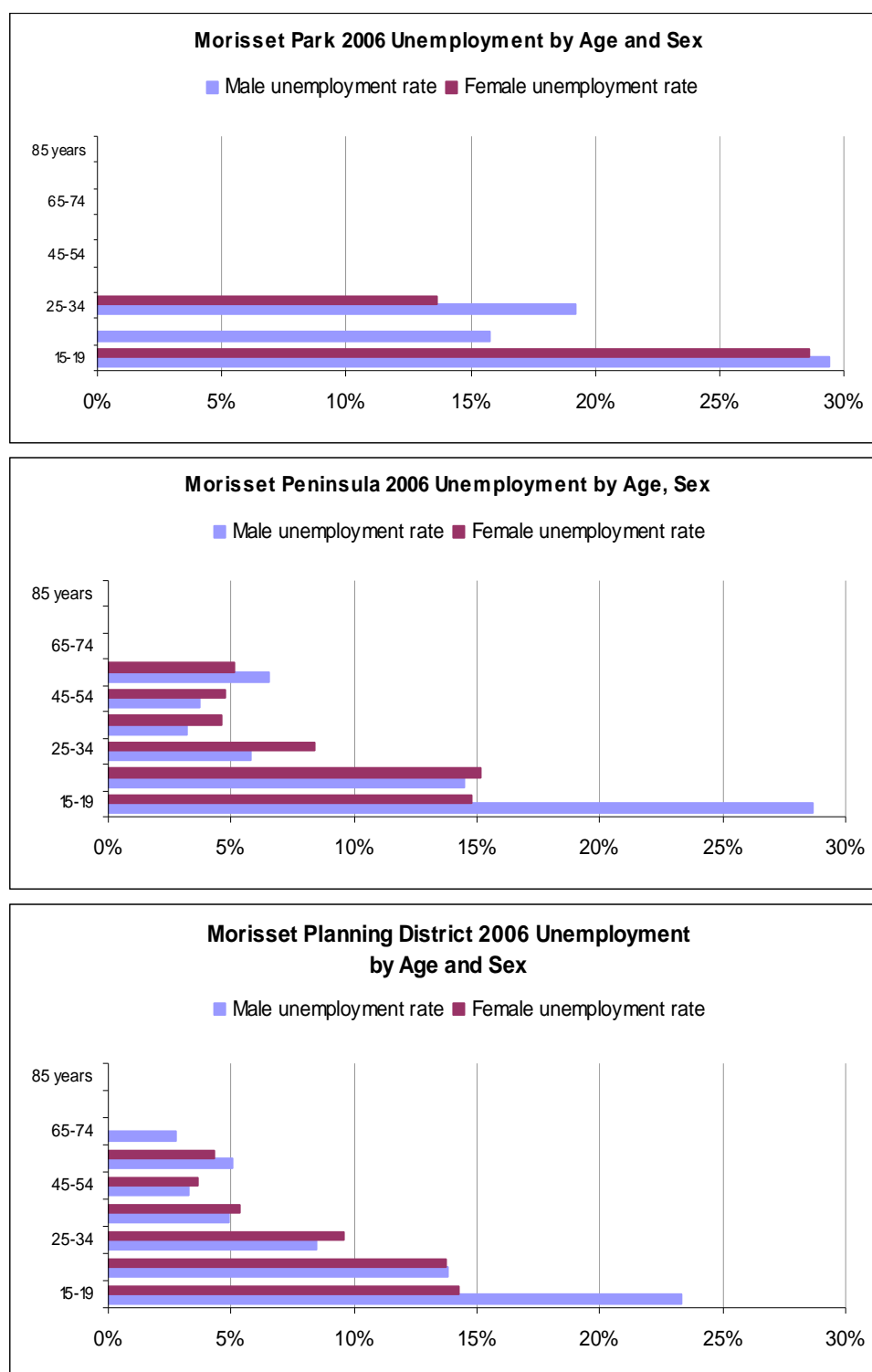
**Table 11: Labour Force Status**

	Morisset Park	Morisset Peninsula	Morisset Planning District	LGA	NSW
EMPLOYED, WORKED:					
Full-time(a)	192	1,767	4685	46,199	1,879,628
Full-time (% employed)	59.3%	59.0%	59.9%	60.2%	64.6%
Part-time	115	1,008	2516	25,330	842,713
Part-time (% employed)	35.5%	33.6%	32.2%	33.0%	29.0%
Employed, away from work(b)	11	141	338	3,020	103,525
Hours worked not stated	6	80	284	2,188	83,578
Total	324	2,996	7823	76,737	2,909,444
UNEMPLOYED, LOOKING FOR:					
Full-time work	15	167	391	3,613	115,165
Full-time (% unemployed)	75.0%	72.3%	64.4%	65.8%	62.9%
Part-time work	5	64	216	1,878	67,994
Part-time (% unemployed)	25.0%	27.7%	35.6%	34.2%	37.1%
Total	20	231	607	5,491	183,159
Total labour force	344	3,227	8430	82,228	3,092,603
Not in the labour force	244	2,511	7673	58,513	1,801,010
Labour force status not stated	24	263	878	6,522	356,648
2006 Unemployment rate	5.8%	7.2%	7.2%	6.7%	5.9%
2001 Unemployment rate	9.8%		9.2%	9.5%	7.2%
2006 Participation rate	56.2%	53.8%	49.6%	55.8%	58.9%

	<b>Morisset Park</b>	<b>Morisset Peninsula</b>	<b>Morisset Planning District</b>	<b>LGA</b>	<b>NSW</b>
2001 Participation rate	57.0%		49.6%	57.4%	62.2%

Since 2001, unemployment rates have fallen across NSW broadly. Across NSW and Lake Macquarie the unemployment rate fell to 4.6% and 4.8% respectively (June 2007 Small Area Labour Markets figures released by the Department of Employment and Workplace Relations). It is reasonable to assume that the subject areas of Morisset have enjoyed a similar reduction in unemployment rates.

Figure 16 shows the breakdown of unemployment in Morisset Park, Morisset Peninsula and Morisset Planning District by age and gender. Male unemployment is slightly higher overall, which is common across most populations. The chart also displays a higher unemployment rate for young people, both male and female. While this, also, is a common phenomenon, it still holds import for the consideration of employment generating land uses in the Morisset area. While mooted developments, such as increased retail space in Morisset will have a positive impact on youth employment, consideration should be given to the generation of a diversity of employment options.



**Figure 16: Unemployment Rates by Age and Sex**

#### 4.9.2 Employment Industries

The dominant fields of employment in the subject areas are 'health care & social assistance', 'retail trade', 'education & training', 'construction' and 'manufacturing' (Table 12). While 'mining' is not a dominant field of employment, Morisset - like neighbouring areas such as Toronto - has a substantially higher level of mining employment than the State as a whole.

**Table 12: Employment Industries**

	Morrisset Park*	Morrisset Peninsula*	Morrisset Planning District*	LGA*	NSW*
Health care & social assistance	13.1%	15.5%	14.1%	13.1%	10.5%
Retail trade	10.7%	12.2%	11.2%	12.8%	11.1%
Education & training	9.2%	8.4%	9.2%	8.4%	7.6%
Construction	8.0%	9.8%	10.5%	9.2%	7.3%
Manufacturing	7.6%	10.7%	12.9%	11.1%	9.6%
Transport, postal & warehousing	6.7%	5.1%	5.0%	4.3%	5.0%
Wholesale trade	6.4%	3.2%	3.3%	3.6%	4.7%
Other services	4.6%	3.8%	4.6%	4.4%	3.8%
Administrative & support services	4.0%	3.2%	2.9%	2.6%	3.1%
Public administration & safety	3.7%	4.6%	4.1%	5.7%	6.0%
Professional, scientific & technical services	3.7%	3.4%	3.7%	5.1%	7.3%
Electricity, gas, water & waste services	3.7%	2.8%	2.3%	1.8%	1.0%
Financial & insurance services	3.7%	2.6%	1.9%	3.5%	5.0%
Accommodation & food services	3.4%	5.2%	5.0%	6.0%	6.5%
Rental, hiring & real estate services	2.4%	2.0%	1.6%	1.6%	1.7%
Information media & telecommunications	1.8%	1.6%	1.3%	1.2%	2.4%
Mining	1.8%	1.4%	1.4%	1.9%	0.7%
Arts & recreation services	0.9%	1.1%	1.1%	1.0%	1.4%
Agriculture, forestry & fishing	0.9%	0.9%	1.2%	0.4%	2.7%

\* % of total employed persons aged over 15 years

The top 5 employment industries for males and females in the various areas are presented in Table 13.

**Table 13: Main Employment Industries by Gender**

	Morisset Park*	Morisset Peninsula*	Morisset Planning District*	LGA*	NSW*
MALES:					
Construction	23 (12.7%)	255 (15.8%)	651 (16.6%)	6,047 (14.7%)	183,998 (11.7%)
Manufacturing	18 (9.9%)	232 (14.3%)	681 (17.3%)	6,939 (16.8%)	202,434 (12.9%)
Health care & social assistance	17 (9.4%)	103 (6.4%)	245 (6.2%)	2,056 (5.0%)	67,856 (4.3%)
Transport, postal & warehousing	16 (8.8%)	123 (7.6%)	299 (7.6%)	2,700 (6.0%)	111,898 (7.1%)
Retail trade	13 (7.2%)	154 (9.5%)	322 (8.2%)	3,881 (9.4%)	140,058 (8.9%)
FEMALES:					
Health care & social assistance	26 (17.8%)	363 (26.2%)	784 (23.6%)	7,989 (22.5%)	236,487 (17.7%)
Retail trade	22 (15.1%)	213 (15.4%)	482 (14.5%)	5,932 (16.7%)	183,871 (13.7%)
Education & training	18 (12.3%)	161 (11.6%)	431 (13.0%)	4,524 (12.7%)	152,426 (11.4%)
Wholesale trade	9 (6.2%)	20 (1.4%)	83 (2.5%)	865 (2.4%)	49,592 (3.7%)
Financial & insurance services	9 (6.2%)	57 (4.1%)	106 (3.2%)	1,742 (4.9%)	76,614 (5.7%)

\* % of total employed persons aged over 15 years

Clearly there are major differences in employment industries for the different sexes across the subject areas. For males in the Morisset Park, Morisset Peninsula and Morisset Planning District, two of the top 5 employment industries - 'Construction' and 'Manufacturing' - are driven by trades. This is not an unexpected finding as the proportion of the population with a skilled vocational qualification, usually a trade, is higher in the Hunter than anywhere else in NSW.

While 'manufacturing' is one of the principal employers of males in the Morisset region, female employment is concentrated in 'health care & social assistance' and 'retail trade'. The domination of health employment in Morisset is undoubtedly a factor of the continuing presence of local health facilities with strong demand for labour at individual sites, for example, the Morisset Hospital and nearby aged care facilities.

#### 4.10 INCOME

Income data available from the 2006 Census are presented in Table 14. **Generally speaking the Lake Macquarie area including the subject areas in Morisset, have lower incomes than the NSW averages.** It is worth noting that the non-response rate for these questions was between 7 and 12% for all subject areas, meaning that these data could be somewhat unreliable.

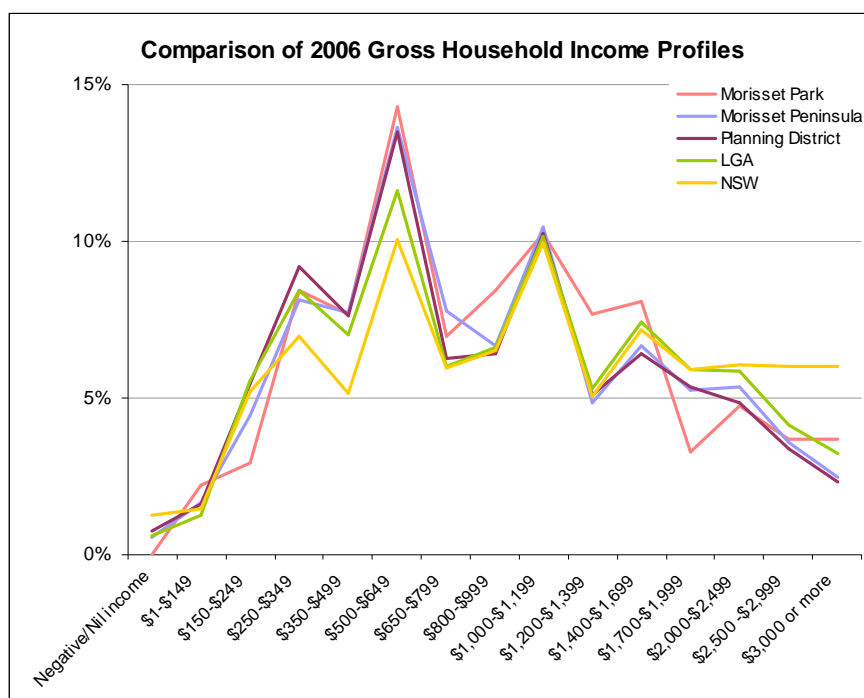
Table 14: Median Family, Household and Individual Incomes

Medians	Morrisset Park	Morrisset Peninsula	Morrisset Planning District	Lake Macquarie	NSW
Weekly household income	\$929 (\$800-\$999)	* n/a (\$800-\$999)	* n/a (\$650-\$799)	\$922 (\$800-\$999)	\$1,036 (\$1,000-1,199)
Weekly family income	\$1,046 (\$1,000-1,199)	* n/a (\$1,000-1,199)	* n/a (\$1,000-1,199)	\$1,102 (\$1,000-1,199)	\$1,181 (\$1,000-1,199)
Weekly individual income	\$403 (\$400-\$599)	* n/a (\$250-\$399)	* n/a (\$250-\$399)	\$394 (\$250-\$399)	\$461 (\$400-\$599)
Average household size	2.7	2.5	2.5	2.6	2.6

\* n/a - not available

The Australian Taxation Office (ATO) requires precise figures from taxpayers, but its published statistics (*Taxation Statistics 2004-05* is the most recent version) report only on Postal Areas. The mean taxable income for the 4,920 individual taxpayers in Postcode 2264, which includes the suburbs of Morrisset Peninsula, Dora Creek, Eraring and Mandalong, was \$39,935 - nearly \$770 a week. This is taxable income, however, meaning that there is no way of knowing actual net income. However, it is clear from Taxation Statistics that Postcode 2264 falls into the lower range of taxable incomes in NSW, below the mean figure for the State of \$48,182.

It is also important to distinguish between the two data sources - the ATO reports 'mean' or average taxable incomes, whilst the Census reports 'median' incomes. Depending upon the

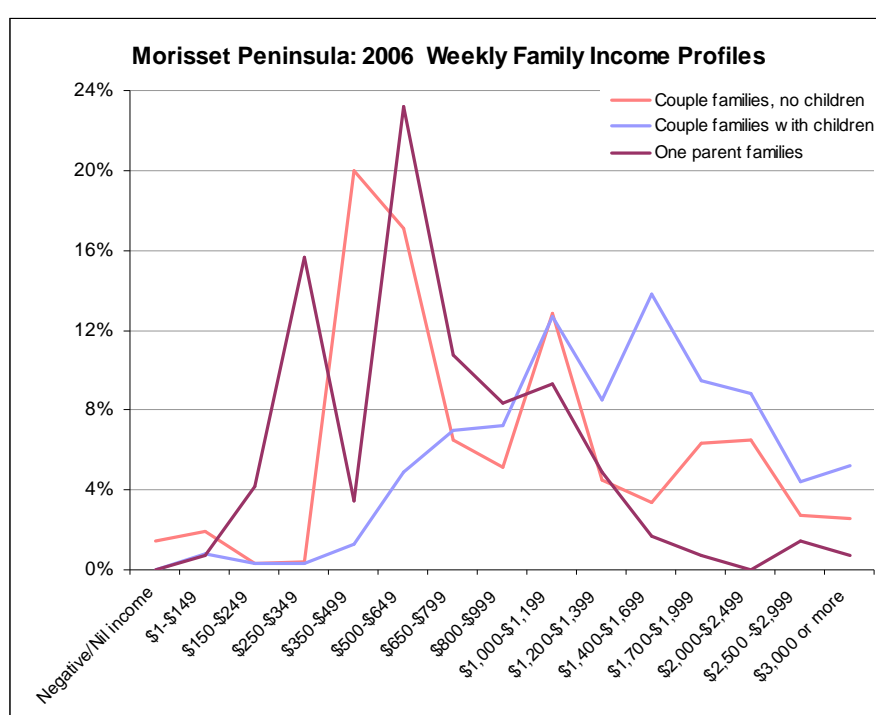


distribution of income data, both the 'mean' and 'median' data can produce distorted outcomes.

Figure 17: Household Income Profiles

Figure 17 displays the proportion of household earnings within each ABS defined weekly income band for each subject area. The chart clearly exhibits a higher proportion of Morisset Park, Morisset Peninsula and Morisset Planning District households earning in the lower income bands than the NSW average, and to a lesser extent, Lake Macquarie LGA. Correspondingly, proportionally fewer of these households from these areas earn in the upper income bands.

Further insight can be gained into the earning profile of Morisset Peninsula families by analysing weekly income by family type (Note: given the small number of families in Morisset Park the data was highly volatile, and therefore unable to be analysed). Figure 18 shows the distribution across the earning spectrum of 'couple families with children', 'couple families without children' and 'one parent families'. The chart reveals that **'couple families with children' represent stronger earning units**, as there is a larger representation in the higher income bands. Both 'one parent families' and 'couple families with no children' show large spikes in the lower income brackets; between \$500-\$649 per week and \$350-\$499 per week respectively.



**Figure 18: Morisset Peninsula: Family Income Profiles**

Table 15 further illustrates the general trends of lower family incomes in the Morisset subject areas compared with NSW and Lake Macquarie LGA data. Median data for all Lake Macquarie LGA family types are higher than the Morisset areas, but lower than the NSW state average.

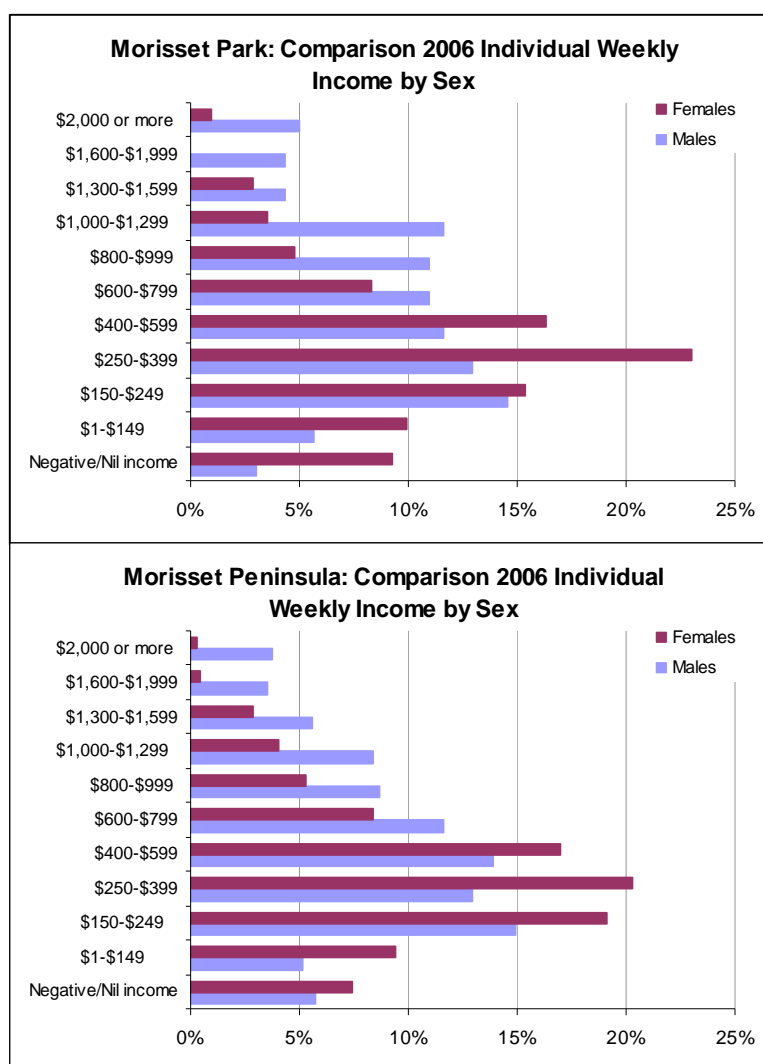
**Table 15: Comparison Median Weekly Family Incomes by Family Type**

Medians	Morisset Park	Morisset Peninsula	Morisset Planning District	Lake Macquarie	NSW
Couple family, no children	\$650-\$799	\$650-\$799	\$650-\$799	\$800-\$999	\$1,000-\$1,999
Couple family, with children	\$1,200-\$1,399	\$1,200-\$1,399	\$1,200-\$1,399	\$1,400-\$1,699	\$1,400-\$1,699
One parent family	\$650-\$799*	\$500-\$649	\$500-\$649	\$500-\$649	\$500-\$649
Other family	\$500-\$649*	\$800-\$999*	\$800-\$999*	\$650-\$799	\$800-\$999

\* median based on small numbers



Figure 19 depicts the proportion of Morisset Park and Morisset Peninsula residents' earning in each of the income brackets, broken down by sex. In both subject areas, female incomes are lower than male incomes, with spikes appearing around the \$250 to \$399 brackets, for females whilst the male incomes are more evenly distributed.



**Figure 19: Morisset Park and Morisset Peninsula: Individual Income by Gender**

Higher earning for males generally has less to do with pay rates, and more to do with the employment arrangements which males and females are engaged in. Males are much more likely to be employed on a full-time basis; full-time positions account for approximately 76% of male employment for residents of Morisset Park. The reverse is true for female employment; only 38% of female positions are full-time, with a majority being part-time/casual positions.

#### 4.11 HOUSING COSTS

To provide a sense of expenses as well as income, the ABS also reports on housing costs, including rent and monthly mortgage repayments. These data are presented in Table 16. Interestingly, rents are in the same bracket in all subject areas (\$180-\$224) despite there being subtle differences in ABS derived 'absolute' medians for Morisset Park, Lake Macquarie and NSW (Note: because Morisset Peninsula and Morisset Planning District data are derived from an amalgamation of state suburb data, the 'absolute' median figure is unavailable).

**Table 16: Comparison of Median 2006 Housing Costs**

Medians	Morisset Park	Morisset Peninsula	Morisset Planning District	Lake Macquarie	NSW
Weekly rent	\$190 (\$180-\$224)	* n/a (\$180-\$224)	* n/a (\$180-\$224)	\$185 (\$180-\$224)	\$212 (\$180-\$224)
Monthly mortgage	\$1,400 (\$1,400-1,599)	* n/a (\$1,200-1,399)	* n/a (\$1,200-1,399)	\$1,300 (\$1,200-1,399)	\$1,517 (\$1,400-1,599)

\* n/a data not provided by the ABS

In contrast to the similarity in weekly rental data, monthly mortgage repayments show some variability between some subject areas. For example, Morisset Park has an 'absolute' median repayment of \$1,400 a month, which is higher than the Lake Macquarie 'absolute' median (\$1,300) but lower than found across NSW, \$1,517. As for Lake Macquarie, Morisset Park has a higher monthly repayment than Morisset Peninsula and Morisset Planning District based on the repayment brackets of \$1,400-\$1,599 and \$1,200-\$1,399 respectively.

## 4.12 POPULATION PROJECTIONS

Permanent population growth associated with the proposal will be influenced by a number of factors, including style of apartments, employment opportunities, purchase price, on-site facilities and the ability of the area to meet the social, recreational and commercial needs of the incoming residents.

According to the 2006 Census there are no apartment complexes over two storeys in Morisset Park and only 3 in the Morisset Peninsula area; as such this development will be different to the 2006 residential mix. The influx of new population is likely to differ from the current Morisset community. The majority of Morisset Park and Morisset Peninsula residents have lived in the area for at least 5 years, however as Morisset transforms into a 'emerging major regional centre' over the next 25 years, it is likely to attract a different mix of residents especially given Morisset's proximity to the northern railway line and the F3 freeway.

In the current social and economic climate, it is more likely that these changes will occur over a long term, rather than a short to mid-term period of time. Accordingly, the following projections will assume that the incoming population will be statistically similar to the current profile provided by the 2006 census figures of Morisset Park.

Using calculations from the 2006 census estimates can be made as to the average household size, and hence, a projected population for the proposed development. In 2006 the average number of people per 'flat, unit or apartment' in Lake Macquarie LGA was 1.6, whilst in NSW the figure was 1.9. It is important to note that the ABS has suggested that these figures will fall over coming years as the population undergoes shifts associated with an ageing population, however for the purpose of this report the population projections will be based around densities of 1.6 persons per unit (low estimate) and 1.9 persons per unit (high estimate).

These current Morisset Park and Lake Macquarie figures would yield a projected population of between up to 141 people (Table 17), with the corresponding projected age profiles presented in Table 18. It should be noted however that as apartment style dwellings are not typical in the area, and the general trend toward older and/or childless couples attracted to apartment style living, child and student populations may be overstated.

**Table 17: Projected Population Numbers for the Proposed Development**

	<b>Dwellings</b>	<b>Projected Population</b>
Flat, unit or apartment dwellings	75	141 (1.9 persons per unit)
		117 (1.6 persons per unit)

**Table 18: Projected Population Age Profile**

	<b>Residential Numbers (@1.9 per unit)</b>	<b>Residential Numbers (@2.16 per unit)</b>
<b>Based on 2006 NSW Age Profile</b>		
0-14 yo	28	23
15-44 yo	59	49
45-64 yo	35	29
65+	20	16
<b>Based on 2006 Morisset Park Profile</b>		
0-14 yo	31	25
15-44 yo	48	40
45-64 yo	41	34
65+	22	18

Age and education projections associated with the projections include:<sup>3</sup>

- A projected influx of between 23 and 31 children under the age of 15 into the Morisset Park area resulting in;
  - Up to 8 children aged less than 5 years, with up to 3 attending pre-school.
  - Up to 14 residents attending local infants/primary schools.
  - Up to 10 residents attending secondary schools.
  - 12 to 15 additional students attending Government schools (8-10 in infants/primary and 4-5 in secondary schools) and a further 4 to 6 students attending 'other non-government' schools (2-3 in infants/primary and 2-3 in secondary schools).
- A projected increase of between 40 and 48 residents in Morisset Park aged between 15 and 44 years, leading to approximately
  - 4 to 5 TAFE students residing in the development.
  - 3 to 4 residents attending 'university or other tertiary institution'.
- A projected increase of between 16 and 20 residents in Morisset Park aged over 65 years.

<sup>3</sup> For consistency the numbers reported have been calculated using Morisset Park 2006 averages

## 5. COMMUNITY CONSULTATION

Johnson Property Group has facilitated its own community consultation strategy, comprising:

- A meeting with community groups
- Doorknock discussions with local residents
- Community Open Day, including feedback questionnaire.

s meeting with community groups and facilitation of a Community Open Day (including feedback survey) and supplied Key Insights documentation of findings from the process.

Whilst Key Insights did not attend the Proponent's meetings with Community Groups or resident doorknocks, Johnson Property Group has provided Key Insights with documentation of findings from their consultation process. Key Insights' attendance at the Open Day presented an opportunity to independently assess community issues and aspirations about the development of this site. Key Insight's findings largely concur with those emerging from Johnson Property Group's consultation process.

### 5.1 MEETING WITH COMMUNITY INTEREST GROUPS

Johnson Property Group held a meeting with representatives of three of the main community stakeholder groups representing the communities most likely to be affected by the proposal. Key Insights did not attend the meeting but received documentation from JPG outlining issues discussed and observation regarding general tone of meeting. Members from the following community groups attended the meeting:

- Southlakes Business Chamber & Community Alliance (President/Vice president)
- Central Coast Community Environment Network (Convener/Secretary)
- Morisset Park and District Action Group (Keith White).

According to the Proponents documentation of the meeting, all groups had similar concerns, focusing on the need for appropriate scale of development that responded to local needs and delivered local benefits, as well as benefits for the wider Lake Macquarie. Issues documented by the Proponent as raised by groups were:

- Height of built form
- Stormwater runoff and waste water management
- Helipad - noise and frequency of operation
- Lake access
- Heritage sensitivity & onsite graves
- Native Title
- Marine Ecology
- Roads & Infrastructural upgrades

- Green measures
- Community Consultation Program

Johnson Property Group recorded a generally positive response to the meeting from community groups. A copy of JPG's record of the meeting is attached in Appendix 1.

## 5.2 RESIDENT DOORKNOCK

In the week leading up to the Community Open day Johnson Property Group conducted doorknock discussions with over 50 residents within the immediate vicinity of Trinity Point site. The aim of the doorknock was to confirm that the resident has received an invitation to the Open Day, check general level of awareness of proposal (i.e. identify information gaps) and get an early indication of thoughts regarding the proposal. JPG's record of residents comments included in Attachment 2. Of the 49 comments recorded by JPG, approximately 20 were positive (expressed enthusiasm/noted only benefits/no concerns), 15 neutral (i.e. positive but some concerns/not interested) and 14 negative (opposed to proposal/strong concerns).

## 5.3 COMMUNITY OPEN DAY

A Community Open Day aiming to inform interested community members and enable input was undertaken by Johnson Property Group on Sunday 25 November 2007. Community participants were invited to inspect plans and draft consultant reports and discuss issues with the proponent or relevant specialist. Key Insights attended the Open Day, and undertook individual discussions with community members attending the session (see section 5.2.1).

Community Feedback was also captured by Johnson Property Group via a self-administered questionnaire (see section 5.2.2).

### 5.3.1 Key Insights' discussions

Issues emerging from the discussions were mixed, with participants identifying a range of concerns and benefits potentially emerging from the development. Many individuals were supportive of the concept but raised specific issues, most commonly relating to scale and/or helicopter noise.

Issues and opportunities identified in discussions included:

- Scale of Marina - proposal is too large.
- Helicopter noise - negative impacts for residents.
- Local recreational opportunities - benefit for residents and visitors.
- Generation of tourism - benefits for local and regional economy.
- Traffic impacts - concerns for local road system, although proposed upgrades mitigated concern somewhat
- Amenity/lifestyle impacts - concerns regarding effect on local residents' quality of life.
- Access to Bay - concerns scale, location and orientation of marina compromise access.
- Water quality - concerns that Bay cannot cope with pollution from 300 boats.
- Planning processes - concern that Council to be bypassed from decision making and that consultation is insufficient.

- Emergency access – concerns re fire access for 6-story apartment buildings.

Generally, it was observed that those that lived closer to the development, or directly opposite the Bay on the waterfront, tended to have more marked concerns and respond more negatively to the proposal. A more comprehensive record of discussions at the Open Day is included in Appendix 3.

### **5.3.2 Feedback Questionnaire**

Participants at the Open Day were invited by Johnson Property Group to fill in a questionnaire survey asking their opinions regarding the proposal and the Open Day. A total of 49 completed questionnaires were completed and analysed by Johnson Property Group, with findings submitted to key Insights in graphic and tabular form (See Appendix 4).

The key findings from the Proponent's analysis were:

- Participants were split between those who felt positively or those who felt negatively about the proposal (43% negative or very negative, 42% positive or very positive), although those who felt positive were more likely to feel very positive about proposal.
- Approximately two-thirds (66%) of respondents had concerns regarding the proposal - the major issues were helicopter noise, followed by with concerns with scale of development, traffic issues, and impact on local residents. Almost one third of respondents had no concerns regarding in the proposal
- Approximately 80% of respondents identified benefits emerging from the proposal. Almost 50% of respondents identified economic impacts, including local employment. Marina infrastructure, public access to the lake, tourism generation and recreational opportunities were considered the major benefits emerging from the proposal. 20% of respondents could see no benefits of proposal.

### **5.3.3 Summary of Open Day Findings**

Johnson Property Group's questionnaire findings generally reflect Key Insight's independent discussions with individuals or groups of participants at the Open Day. The key community messages emerging from the Open Day are:

- There is considerable support for the proposal but also substantial concern, especially regarding scale of development (particularly the marina) , helicopter noise, traffic and local amenity issues
- Local and regional economic/employment and tourism/recreational benefits were identified as potential positive impacts, including improved public access to lake.
- Those living in closer proximity to the proposal, including opposite waterfront, are likely to have more concerns regarding the development

## **5.4 BONNELLS BAY PROGRESS ASSOCIATION**

Johnson Property Group attended a meeting organised by the Bonnell's Bay Progress Association on the 5<sup>th</sup> February 2008. The meeting was Chaired by the Presidents of the Bonnell's Bay Progress Association, Col Roach. Mayor of Lake Macquarie, and local state MP, Greg Piper Addressed the meeting. Mr. Keith Johnson and Bryan Garland also addressed the meeting, representing the Proponent. Notes from this meeting were taken by Key Insights, and are included in APPENDIX 5.

## 6. ECONOMIC OVERVIEW

As a mixed use proposal, there are a number of elements and factors to consider regarding the Trinity Point Proposal. The presence of permanent residents, holiday accommodation and day-trip visitors will have varying positive effects on the local economy. The provision of jobs and income associated with the construction and ongoing operation of the project also bears consideration.

### 6.1 MARINA

The proposed marina will represent a substantial source of income to the area, through berth charges to vessel owners. The following charts project the likely income stream (in \$2007) to be received from berthing fees once the marina achieves full development of 308 berths.

It is expected that permanent (year round) berth charges will make up the bulk of the marina revenue. Table 19 shows an indicative annual revenue stream from permanent berths, assuming an 80% occupancy rate. The mooring fees below are based on the published rates of the Anchorage Marina, Port Stephens. In the case of the Anchorage Marina, these rates cover a car park, power, water and pump-out fees. Some marinas charge a "green levy" or environmental levy of \$3 per foot, per year. Such a levy has been included in the table, below.

**Table 19 Indicative annual revenue: permanent berths**

Vessel Size (m)	No. expected (at full development) <sup>4</sup>	Indicative mooring fee (permanent, per month) <sup>5</sup>	Monthly Revenue (at 80% occupancy)	Per Annum Revenue (at 80% occupancy)
8	21	\$ 630	\$ 10,584	\$ 127,008
10	28	\$ 650	\$ 14,560	\$ 174,720
12	120	\$ 820	\$ 78,720	\$ 944,640
14	108	\$ 935	\$ 80,784	\$ 969,408
16	22	\$ 1,095	\$ 19,272	\$ 231,264
18	6	\$ 1,295	\$ 6,216	\$ 4,592
20	3	\$ 1,500	\$ 3,600	\$ 43,200
<b>Total:</b>	<b>308</b>		<b>\$ 213,736</b>	<b>\$ 2,564,832</b>
				"Green" Levy <sup>6</sup>
				<b>Total:</b>
				<b>\$ 31,046</b>
				<b>\$ 2,595,878</b>

Busy times of the year, particularly the Christmas break, will see increased activity at the marina. Table 20 shows indicative revenue from the resulting casual berthing. Table 20 will assume that this extra revenue will be equivalent to the remaining 20% of marina capacity being fully utilised for 2 months of the year. Rates for casual berthing, especially over the Christmas period, are higher than regular permanent berthing fees. The figures in Table 20 are based on the published Anchorage Marina rates for monthly berthing fees over the peak season.

<sup>4</sup> From Trinity Point Project Proposal, Working Draft October, 2007.

<sup>5</sup> Based on Anchorage Marina Port Stephens charges (Oct 2007- Sept. 2008). Note: Rates for craft 60ft+ are not published; the figure provided for 20m vessels is an estimate.

<sup>6</sup> Calculated at \$3 per foot per annum (1m=3.3ft.) and 80% of full occupancy.

**Table 20 Indicative annual revenue: casual berthing**

Vessel Size (m)	No. expected (at full development) <sup>7</sup>	Indicative mooring fee (peak season, per month)	Peak Season Casual Revenue
8	21	\$ 1,445	\$ 12,138
10	28	\$ 1,560	\$ 17,472
12	120	\$ 1,995	\$ 95,760
14	108	\$ 2,285	\$ 98,712
16	22	\$ 2,545	\$ 22,396
18	6	\$ 2,755	\$ 6,612
20	3	\$ 3,000	\$ 3,600
<b>Total:</b>	<b>308</b>		<b>\$ 256,690</b>

The combined total of the permanent and casual berthing fees equates to \$2,852,568 per annum (in \$2007) once the marina reaches full development of 308 berths. In addition to berthing fees, the marina and associated facilities will be a source of other income. This will be derived from the repair and maintenance facilities on site.

## 6.2 RESIDENTIAL LIVING

The proposal contains permanent residential accommodation for a total of 75 dwellings in three and four bedroom and "penthouse" configurations.

The ABS releases weekly household expenditure data to provide insight into household spending patterns. This information is available divided into quintiles, by household income. The table below uses NSW household fourth quintile expenditure figures as a base for estimating likely household expenditure within the proposed development.

The fourth quintile represents spending patterns by households within the second highest quintile of households, according to income. This quintile was chosen as a basis for analysis due to the expectation that incoming residents to the development would be moderately above average financial means.

Estimated p.a Total Expenditure on goods and services: (excluding housing costs, domestic fuel and power, and transport costs)

<b>Food and Beverages:</b>	Per Dwelling <sup>8</sup>	Total (75 Dwellings)
Food and non-alcoholic beverages	\$ 10,608	\$ 795,581
Alcoholic beverages	\$ 1,415	\$ 106,092
<b>Subtotal:</b>	<b>\$ 12,022</b>	<b>\$ 901,672</b>
<b>Non Food</b>		
Tobacco products	\$ 736	\$ 55,169
Clothing and footwear	\$ 2,601	\$ 195,066
Household furnishings and equipment	\$ 3,248	\$ 243,586
Household services and operation	\$ 3,936	\$ 295,195

<sup>7</sup> 20ft+ figure is an estimate.

<sup>8</sup> Source: ABS Cat. No. 6530.0 Household Expenditure Survey, Summary of Results. Table 3. Gross Income Quintile, Household expenditure - New South Wales - 2003-04. Figures have been inflated 10% to represent inflation at flat rate of 2.5% over the four years to 2007.



Medical care and health expenses	\$ 3,512	\$ 263,406
Recreation	\$ 8,206	\$ 615,486
Personal care	\$ 1,202	\$ 90,133
Miscellaneous goods and services	\$ 6,174	\$ 463,063
<b>Subtotal</b>	<b>\$ 29,615</b>	<b>\$ 2,221,105</b>
<b>Food and Non- Food Expenditure</b>	<b>\$ 41,637</b>	<b>\$ 3,122,777</b>

This household expenditure will be spent at Trinity Point, the Morisset Planning District and further afield. Table 21 shows the estimated breakdown of where this trade will be captured. Food purchases will tend to occur locally. The proposed Café and Restaurant facilities are expected to capture a sizable proportion of household expenditure, while the bulk of grocery and convenience shopping is expected to occur within the Morisset Planning District. A number of major supermarket developments are in the planning stages for the Morisset, Town Centre, while smaller shopping locations on the Morisset Peninsular (such as Bonnells Bay) will provide residents with convenience shopping needs. Incoming residents are expected to show a greater propensity to purchase non-food goods and services from outside the Morisset Planning District. This is especially the case with higher order comparison goods, (such as homewares and appliances) where residents may choose to travel to major shopping areas such as Tuggerah or Charlestown.

Table 21 shows the estimated dollar value of this trade, applying the estimates to household expenditure figures in the previous table.

**Table 21: Estimated Proportion and Value of Trade Capture**

Estimated Proportion of trade capture

	Trinity Point	Morisset Planning District	Elsewhere	Total
Food	30% <sup>9</sup>	40%	30%	100%
Non-food	15%	35%	50%	100%

Estimated value of trade capture

	Trinity Point	Morisset Planning District	Elsewhere	Total
Food	\$ 270,502	\$ 360,669	\$ 270,502	\$ 901,672
Non-food	\$ 333,166	\$ 777,387	\$ 1,110,552	\$ 2,221,105
<b>Total</b>	<b>\$ 603,667</b>	<b>\$ 1,138,055</b>	<b>\$ 1,381,054</b>	<b>\$ 3,122,777</b>

Table 21 reveals the considerable economic benefit accruing to the immediate and broader local area as a result of the expenditure of incoming permanent residents as a result of the proposal. In particular, the estimated \$1.138 million which will be spent within the Morisset Planning District will add to the viability and vitality of the Morisset Town Centre and other smaller shopping areas such as Bonnells Bay.

<sup>9</sup> The food component of household expenditure in Trinity Point will be primarily at the café and restaurant locations. Even though such meals represent a small numerical proportion of a household's food spending, the expense associated with eating out means they represent a reasonable proportion of weekly food-spend. In the table above, the estimated 30% of weekly household food spend represents \$61- which roughly equates to a modest restaurant meal for 2.

### 6.3 TOURIST ACCOMMODATION

The presence of overnight visitors will also be of economic benefit to the area. Publications by a number of tourism bodies provide a starting point for estimation of likely spending patterns of visitors to the Tourism component of the proposal.

Tourism NSW releases data down to a regional basis on domestic overnight travel, including origin of travelers, purpose of visit and average daily expenditure of visitors. At June 2007, the average per day spend per domestic overnight visitor to the Hunter was \$130<sup>10</sup>. Although this figure includes travel and airfares, the measure also includes a range of domestic overnight visitors, including those staying in basic accommodation such as camping grounds, and those visiting family and friends. As a result, it is felt that overnight visitors to Trinity Point would be likely to spend considerably more than this average figure. Calculations below will augment the Tourism NSW figure by 50%, assuming an average daily spend of \$195 (which includes accommodation costs) by overnight visitors.

Table 22 estimates the annual spend by overnight tourist visitors to Trinity Point. The ABS releases small area data on tourist accommodation<sup>11</sup> which includes average room occupancy for a variety of accommodation types. The estimated occupancy rate was formulated by averaging occupancy figures for the Hunter Tourism Region, for “hotels, motels and serviced apartments with 15 or more rooms” over the previous four quarters to June 2007. A room density of 2.5 persons has been assumed which points to predominantly couple visitors, with a sprinkling of families and singles. These figures yield an estimated average temporary overnight tourist population of approximately 110 people, however this is subject to seasonal influences and is likely to greatly increase during peak periods (and be conversely lower off season).

**Table 22: Estimated Annual spend, overnight visitors**

Estimated Avg Overnight visitor spend (per day):	\$195
Average occupancy rate:	57.4%
Proposed Rooms:	75
Estimated avg. persons per room	2.5
 Estimated annual spend:	 \$ 1,091,318

Breakdown of expenses to the regional level is not provided in the Tourism NSW literature. However, Tourism Australia releases figures on expenditure by overnight leisure tourists. Figure 20 shows the proportion of expenditure on different areas. Clearly, transport, accommodation and “food and drink” make up the largest proportions of overnight leisure spending. Shopping (for fun) also accounts for a considerable 12% of expenditure by such tourists.

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<sup>10</sup> Source: Tourism NSW, Travel to the Hunter. Year ending June 2007.

<sup>11</sup> ABS. “Tourist Accommodation, Small Area Data. Cat. 8635.0.55.002