



Cobaki Master Planned Community

Centres Catchment Analysis

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1.0 Introduction

This report was commissioned by Leda Manorstead Pty Ltd in September 2016. The purpose of this report is to provide a catchment analysis to determine the appropriate inclusions and scale for the activity centres planned for the Cobaki master planned community.

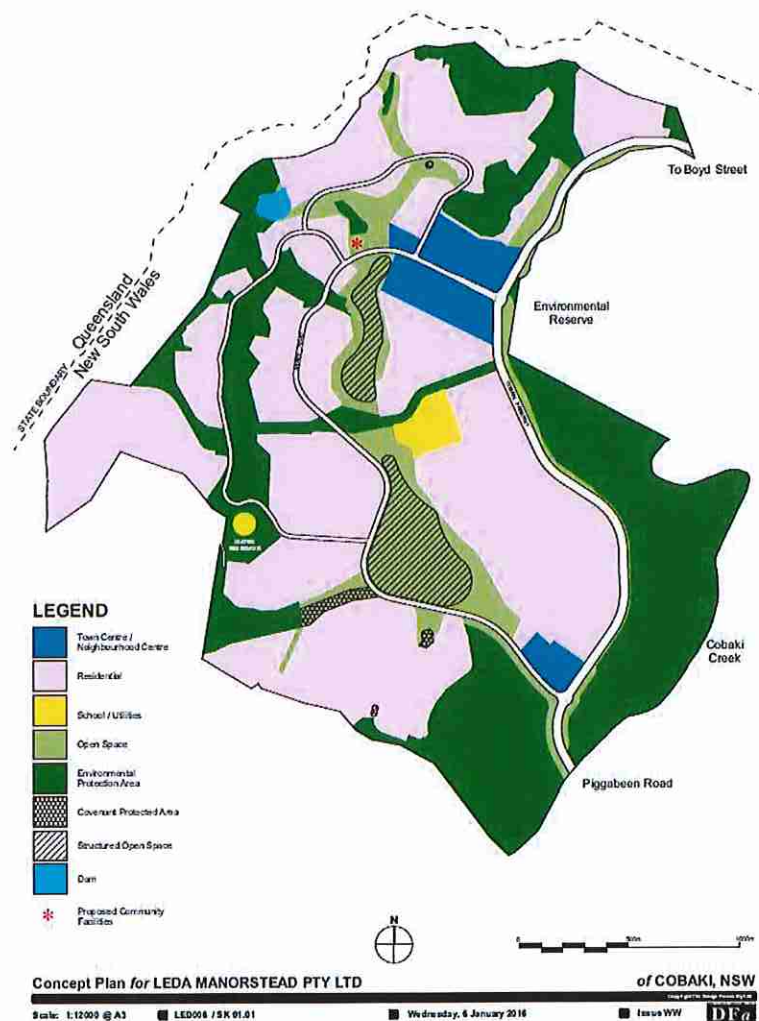
This version of the report incorporates the data from the 2016 Australian Bureau of Statistics census and recent market trends in retail and activity centre precincts.

Cobaki is a master planned community located adjacent to the Queensland / New South Wales border west of the Gold Coast Airport. The Concept Plan proposes a total maximum of 5,500 dwellings over 17 residential neighbourhoods of differing housing types and density, a Town Centre, Neighbourhood Centre, school, child care facilities, a community centre and parklands.

The community will yield an estimated 5,500 dwellings (to be confirmed upon completion of the detailed design), and this will form the base case analysis.

The current concept plan is defined in the following figure.

Figure 1 - Cobaki Concept Plan



1.2 Objectives

The objective of this report is to provide a catchment analysis to inform the design and feasibility process.

The report will investigate the following:

- What scale of retail and related uses can be supported on site?
- What are the demographic and social needs of local and regional residents in relation to retail on the site?
- What is the impact of the Boyd Street interchange?
- What are the associated triggers and risks?
- Identify demand and related issues triggered by 5,500 dwellings on-site.

2.0 Site and Concept Assessment

This section provides an assessment of the characteristics of the subject site and the surrounding land uses from a market and economic perspective to determine the most relevant locational considerations for the proposed mix of uses.

2.1 Project Description

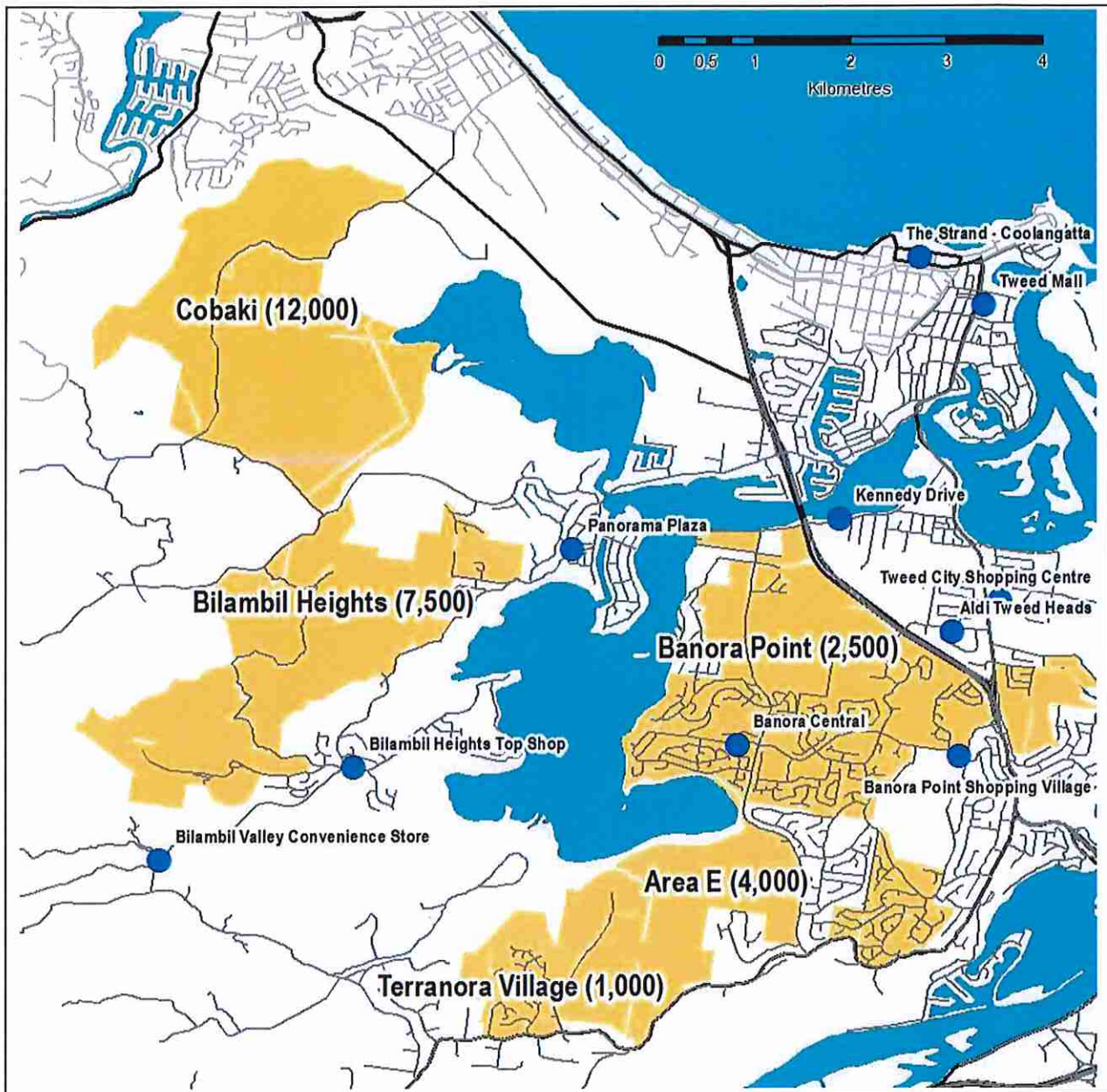
Cobaki is a master planned community located adjacent to the Queensland / New South Wales border west of the Gold Coast Airport. Cobaki Parkway runs through the future community, with access via Boyd Street from the north and Piggabeen Road from the south. The current Concept Plan proposes a total maximum of 5,500 dwellings over 17 residential neighbourhoods of differing housing types and density, a Town Centre, Neighbourhood Centre, a school, child care facilities, a community centre and parklands.

The purpose of the Town Centre is to provide a community focal point with shops, supermarket, services, food outlets, some commercial floor space for small offices, as well as medium density residential. It is understood that current approvals allow for a maximum of 12,000 Sq M of commercial and retail space to provide for the daily and weekly shopping needs of the future Cobaki residents.

2.2 Planned Development

Figure 2 illustrates the site in context with the regional area, including the surrounding urban release areas of Bilambil Heights, Banora Point, Area 'E' and Terranora Village. These urban release areas are projected to comprise a total population of approximately 27,000 people at completion.

Figure 2 - Urban Release Areas (projected population in 000's)



2.3 Location Analysis

Cobaki has approval for 5,500 dwellings and will be serviced by a town centre.

Access to Cobaki from the north is via the Boyd Street overpass.

Coolangatta hosts the most proximate supermarkets to the subject site.



A major planned growth area is located to the south of the site. Development of this area (hosting 7,000 to 10,000 new residents) is likely to take decades.

The Pacific Highway is the major motorway standard road linking northern NSW and SE Qld

Tweed Heads and South Tweed Heads are major shopping centres that are anchored by discount department stores and supermarkets

2.4 Boyd Street Interchange

Access to Cobaki from the north is via Boyd Street. Boyd Street is currently an overpass over the Tugun Bypass. Based on the current road network, future residents of Cobaki will be required to travel along the Gold Coast Highway to access Boyd Street, drive along Boyd Street, then cross the Tugun Bypass on the Boyd Street overpass. This has the potential to cause traffic congestion at the Boyd Street / Gold Coast Highway intersection as the Cobaki development progresses.

The Cobaki development is limited to 3,500 dwellings until there is an interchange at Boyd Street.

2.5 Planning Documentation

In September 2005 Core Economics (now known as RPS) produced the Retail Strategy for Tweed Shire. 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 such as Cobaki and Bilambil Heights.

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

- "1 The character of existing towns and villages and the retail facilities they already have be protected.*
- 2 Where appropriate, Council will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those existing centres, rather than building new ones.*
- 3 Reinforce Tweed Heads south as the major district retail centre by encouraging the expansion and when Tweed's population demands that increased range and level of shopping.*
- 4 Maintain and wherever 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 to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking and cycling.*
- 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."*

2.6 Implications

Cobaki is located adjacent to the Queensland / New South Wales border. While this area currently lacks new residential development and is planned to experience significant growth over the next 10 to 15 years through the development of the Cobaki and Bilambil Heights communities. The increase in population will create demand for retail uses to serve these future communities.

Based on the Tweed Shire Retail Strategy, the population growth projected for the region can support at least an additional five supermarkets from 2004 to 2024, most of which are to be located in the expansion areas of Cobaki and Bilambil Heights. Cobaki is proposed to comprise a Town Centre, while Bilambil Heights is planned to host a similarly sized centre.

The current approval for Cobaki allows the Town Centre to comprise a maximum of 12,000 Sq M of retail and commercial floorspace. There is the potential for the Town Centre to serve the broader area including future residents of the growth areas to the south of Cobaki.

When the Boyd Street interchange is implemented, it will provide greater accessibility to Cobaki resulting in increased residential sales. Overall, this will not affect the scale of the town centre catchment which will include Cobaki and adjacent areas to the south and north.

3.0 Existing Retail Infrastructure

This section provides an assessment of the current and expected retail and centre patterns in the surrounding area and the role and function of these facilities.

3.1 Existing Infrastructure

The existing retail infrastructure is detailed in Table 1.

Table 1 - Existing Retail Infrastructure

Centre	Location	Size	Major Tenants
The Strand Coolangatta	72-80 Marine Parade, Coolangatta	20,000 Sq M	Aldi, Woolworths, Cinemas and 61 speciality stores.
Banora Central	Corner of Leisure and Fraser Drives, Banora Point	5,000 Sq M	Coles and speciality stores
Tweed Mall	Corner of Wharf and Bay Streets, Tweed Heads	18,727 Sq M	Target (5,592 Sq M), Coles (4,054 Sq M), Woolworths and 65 speciality stores
Banora Point Shopping Village	Leisure Drive, Banora Point	4,416 Sq M	Bi-Lo (1,992 Sq M) and 25 speciality stores
Bilambil Heights Shops	75 Simpson Drive, Bilambil Heights	Approx. 400 Sq M	6 Speciality stores (inc convenience store)
Panorama Plaza	Scenic Drive, Tweed Heads West	Approx. 800 Sq M	Convenience Store (230 Sq M) and nine speciality stores.
The Palms Shopping Village	Philp Parade, Tweed Heads	Approx. 300 Sq M	Convenience Store (110 Sq M) and three speciality stores
Tweed Heights	21-25 Amaroo Drive, Banora Point	Approx. 800 Sq M	IGA and specialities
Kennedy Plaza	97 Kennedy Drive, Tweed Heads	Approx. 1,500 Sq M	IGA (est 800 Sq M) and specialities
Kennedy Drive Shops	212 Kennedy Drive, Tweed Heads West	Approx. 600 Sq M	Seafood Market, Fruit and Vegetables
Piggabeen Road Shops	3 Piggabeen Road, Tweed Heads West	Approx. 300 Sq M	Lucky 7, Bottle Shop
Terranora Village	Corner Terranora Road and Henry Lawson Drive, Terranora	Approx. 800 Sq M	Spar and speciality shops
Tweed City	54 Minjingbal Drive, Tweed Heads South	44,568 Sq M	Kmart (7,381 Sq M), Big W (7,033 Sq M), Woolworths (4,527 Sq M), Coles (3,708 Sq M), Best & Less (1,154 Sq M) and 136 speciality stores
Aldi Tweed Heads	9-11 Machinery Drive, Tweed Heads	Approx. 1,300 Sq M	Stand alone Aldi
Tugun	Teemangum St, Tugun	Approx. 5,000 Sq M	Foodworks and local shops
Palm Beach	Gold Coast Highway, Palm Beach	Approx. 15,000 Sq M	Coles (2,148 Sq M), and speciality retail.
The Pines Shopping Centre	KP McGrath Drive, Elanora	33,736 Sq M	Kmart (7,985 Sq M), Coles (5,354 Sq M), Woolworths (3,364 Sq M), and 75 speciality stores.

Source: PCA Shopping Centre Directory, RPS

3.2 Proposed and Planned

Based on the Bilambil Heights Draft Local Area Plan (LAP), a supermarket anchored centre is proposed within the broader Bilambil Heights area. This centre is proposed to serve the weekly and/or fortnightly chore retail needs of local residents.

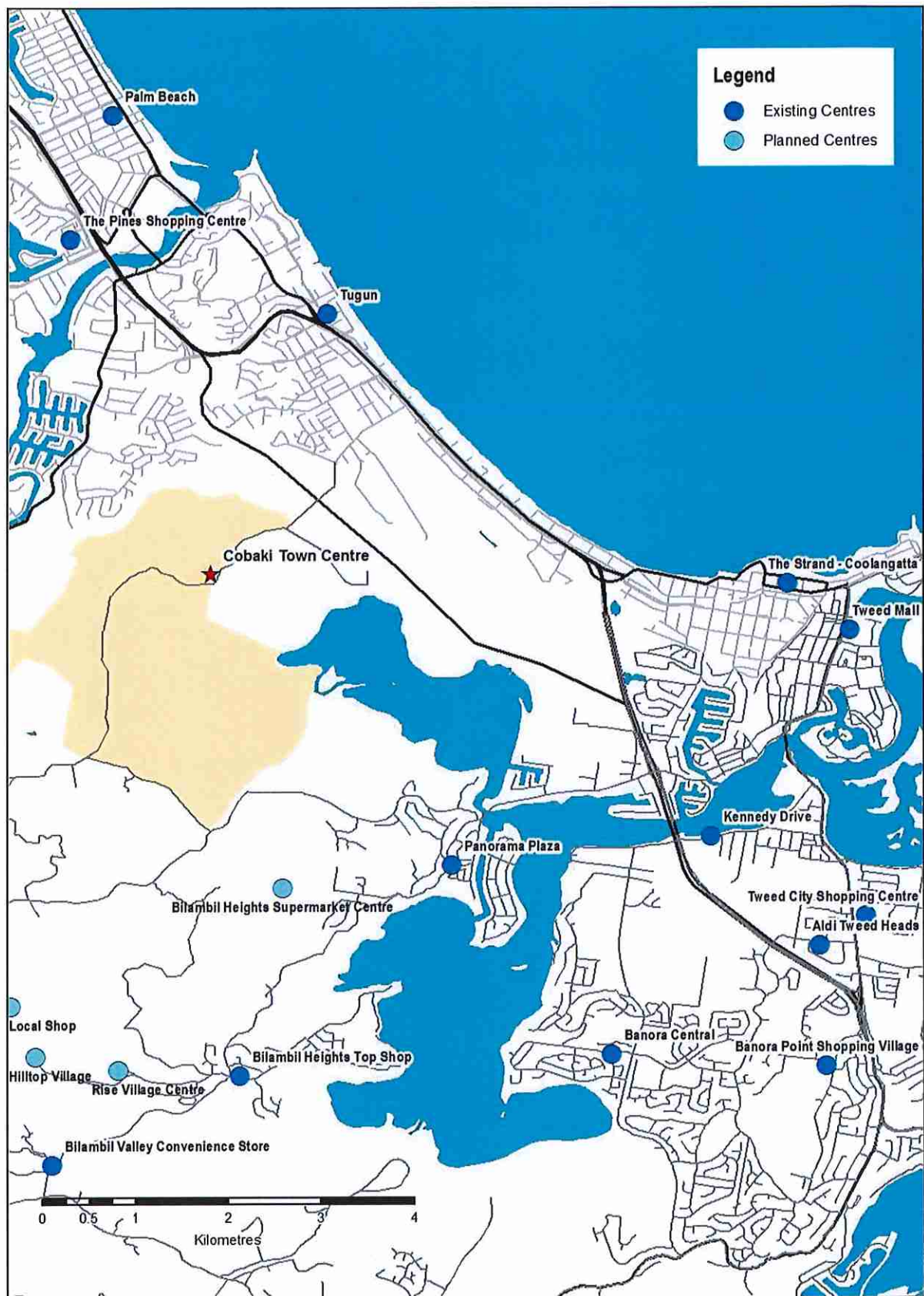
The future RISE development at Bilambil Heights is located south of Cobaki. This development is proposed to comprise of 1,804 residential dwellings at completion, as well as a Village Centre, Hilltop Village and Local Shop.

- The Village Centre is proposed to comprise 6,100 Sq M including a 1,200 Sq M village supermarket, 600 Sq M village shopping centre, 600 Sq M tavern and 3,700 Sq M local business suites and retail.
- The Hilltop Village is proposed to comprise 2,272 Sq M including a 600 Sq M spa, 1,472 Sq M retail / restaurants / studios / art school and 200 Sq M art facility / café building.
- The Local Shop is proposed to comprise 375 Sq M of retail shops.

The proposed retail within the RISE Bilambil Heights development will function to serve that local community.

The following figure illustrates the existing and proposed retail centres surrounding the subject site.

Figure 3 – Existing and Planned Retail Centres



3.3 Implications

Based on the Tweed Shire Council Retail Policy, Tweed Heads South is to be reinforced as the major district retail centre of the Tweed Shire. It is, therefore, important that any development within the Town Centre in Cobaki not compete with the higher order retail function of Tweed Heads South. Tweed Heads South currently comprises bulky goods retailers, DDS and supermarkets. It does not include a Department Store (DS).

A small format DDS may be supported at Cobaki. However, it would need to be a smaller scale so as not to threaten the intended role and function of Tweed Heads and South Tweed Heads as higher order centres.

The retail planning to date has provided sufficient GFA to establish one or two full line supermarkets at Cobaki in conjunction with related and ancillary uses.

The retail centres located on the Cobaki Parkway will service residents of Cobaki, residents of Bilambil Heights who pass through Cobaki to Tugun and/or the Pacific Highway and residents of Tugun. These groups have the potential to generate a significant amount of patronage both before and after the supermarket anchored centre is established at Bilambil Heights.

4.0 Trade Area Delineation

This section provides an analysis of the trade area for the proposed development on the subject site. The delineation of the trade area will be based on the competitive analysis, features such as accessibility and exposure, and natural or artificial barriers that will affect local usage patterns.

4.1 Trade Area Delineation

The Town Centre has the potential to serve the broader area including future residents of Bilambil Heights. Depending on the retail offer, the Town Centre also has the potential to attract residents from Tugun, accessing the site from Boyd Street. As such, a Primary Trade Area (PTA) and two Secondary Trade Areas (STA) have been identified for the proposed retail uses on the site. The PTA and STA's have been defined based on Australian Bureau of Statistics (ABS) Statistical Area 1 (SA1) boundaries and are indicative only.

The PTA is where the majority of trade is expected to be derived. The PTA has been defined as the Cobaki master planned community.

The Secondary Trade Area – South (STA-S) extends north to the Cobaki community, east to the Cobaki Broadwater, south to Carool Road and north to the Queensland / New South Wales border. The STA-S includes the future Rise and Bilambil Heights communities and will represent a growing population over the long term.

The Secondary Trade Area – Tugun (STA-T) has been defined to extend north to the ocean, south to the Tugun Bypass, east to the Pacific Highway and west to the Tweed Heads Bypass. The STA-T includes the suburbs of Tugun and Bilinga.

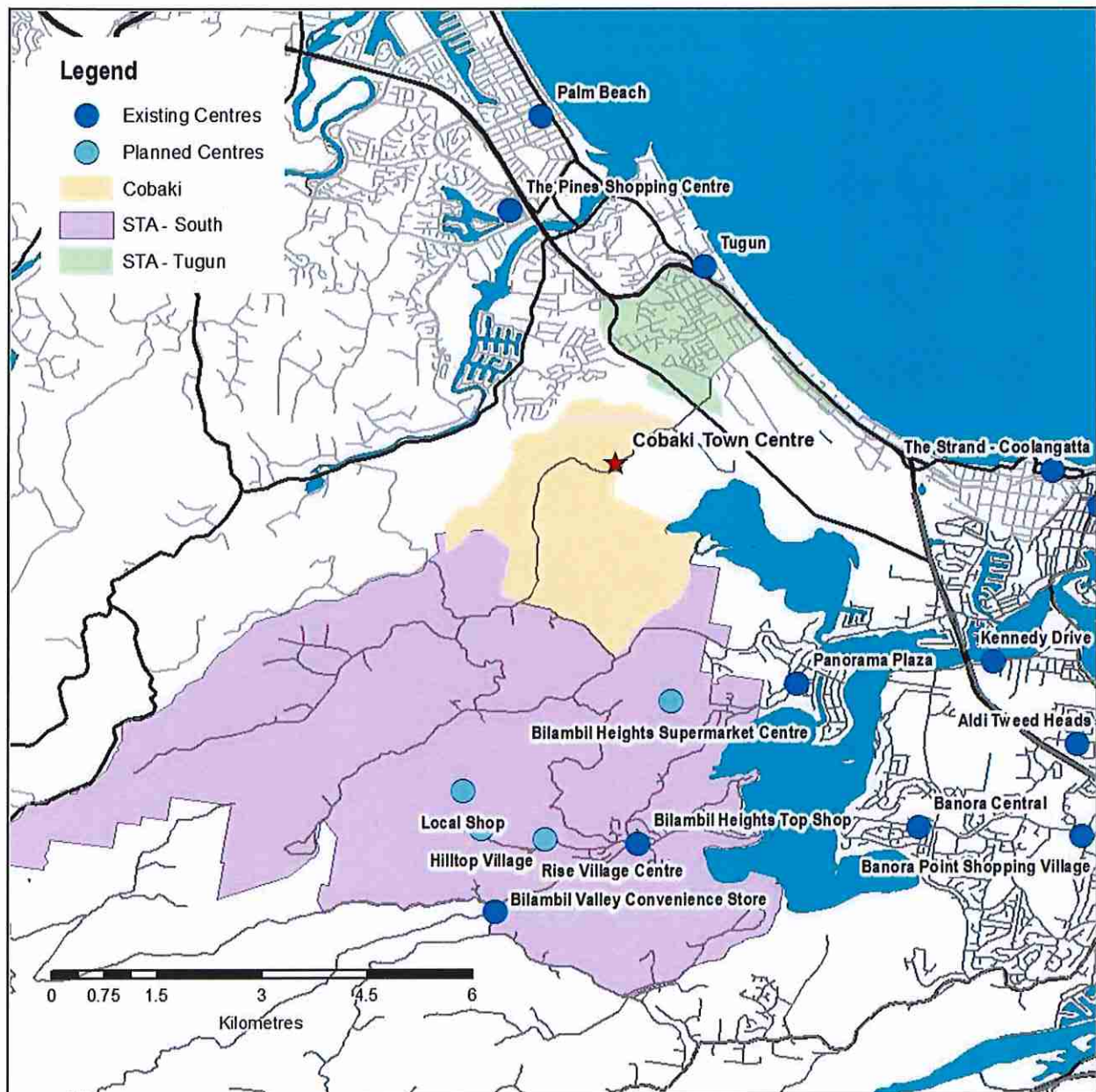
As the PTA is establishing itself, the Town Centre will have the opportunity to cater to a broader area extending from the south of Currumbin Creek to the Tweed River due to the offer of a new supermarket. During this time, the Town Centre will rely on trade from residents of the STA's and inflow from the broader area as the population of the PTA increases. In the longer term, the Town Centre will rely less on inflow from the broader area as the existing centres compete on price or modify of their offer. The ability of the Town Centre to continue to attract inflow from the broader area will be dependent on the operators, retail offer and accessibility to the site.

Over time, when the centre is fully developed, it is possible that part of the STA-T proximate to Boyd Street may develop the characteristics of the PTA (ie regular, repeat and frequent shopping in general preference to other centres with a similar offer or retailers). This conversion will depend on the retail offer and appeal on-site in comparison to the offer and appeal of other centres and locations (Tweed Heads, Coolangatta and Palm Beach).

The implementation of the Boyd Street interchange would make the Town Centre more accessible from the Tugun Bypass. This is expected to increase patronage from residents of the STA-S as they will pass through Cobaki as part of their daily travels.

Figure 4 illustrates the catchment area delineation.

Figure 4 - Trade Areas



5.0 Population and Expenditure Characteristics

5.1 Introduction

This section provides an analysis of the key demographic features and population projections for the defined catchment areas as well as average annual household expenditure. This will determine the present and future size of the market that the site can realistically serve.

5.2 Population Projections

The following table provides estimates of the population household projections for the catchment areas. Projections are based on the 2016 ABS Census, ABS Building Approvals data, the NSW Department of Planning and evaluations conducted by RPS. Projections are based on the build out of Cobaki (with Bilambil Heights and other parts of the STA-S partly developed) and the build out of the total area. The build out of the total area is likely to take several decades as much of the land in the STA-S is in fragmented ownership and has indirect access.

The rate of development in the STA-S is expected to accelerate when the Cobaki Town Centre, the Cobaki Parkway and the Boyd Street interchange are established.

Table 2 – Population Projections

	2016	Cobaki - Build Out	Total Area - Build Out
Population			
Cobaki		13,200	13,200
STA South	4,727	4,920	11,615
STA Tugun	4,685	4,826	4,970
<i>Total Catchment</i>	<i>9,412</i>	<i>22,946</i>	<i>29,785</i>
Household Size			
Cobaki		2.40	2.40
STA South	2.46	2.46	2.46
STA Tugun	2.40	2.40	2.40
Households			
Cobaki		5,500	5,500
STA South	1,922	2,000	4,722
STA Tugun	1,952	2,011	2,071
<i>Total Catchment</i>	<i>3,874</i>	<i>9,511</i>	<i>12,293</i>

Source: 2016 ABS Census, RPS, NSW Department of Planning

The combined STA's had a population of 9,412 people in 2016. The residents of the STA-S will become an important patronage base when the Cobaki Parkway and the bridge connection to Piggabeen Road are established.

5.3 Demographic Characteristics

The demographic profile of the secondary catchment areas has been derived from 2016 ABS Census data. The Tweed Local Government Area (LGA) has been provided as a comparison. A full demographic profile is listed in Appendix A.

5.3.1 Age Distribution

The proportion of residents aged less than 15 years in the STA-S (17%) and the STA-T (17.8%) is similar to the Tweed LGA (16.8%). The STA-T has a much lower proportion of the population aged 65 and over (17.8%) than all of the other areas (STAS- 25.1%, Tweed Shire – 25.3%)

The age distribution of the STA-S is indicative of couples with children and retirees. As Cobaki and Bilambil Heights develop the age distribution is anticipated to comprise of younger families who will be attracted to the growing area. The age distribution of the STA-T is indicative of a higher concentration of middle aged couples. The provision of retail at Cobaki will provide convenience to local families and couples who are time poor and elderly/older residents who benefit from being able to drive a shorter distance and/or walk to the centre as a result of its proximity.

5.3.2 Dwelling Type

The most common type of dwelling in the STA-S is a separate house, accounting for 91.8% of dwellings. This is significantly higher than the Tweed LGA with 65.3% and STA-T with 57.5%.

Regardless of the mix of dwelling types, all residents benefit from the increased choice and proximity to retail uses on the subject site. The dwelling profile of the STA-S is expected to change over time as new developments provide a higher proportion of attached dwellings.

5.3.3 Household Structure

The proportion of families with no children in the STA-S (46.4%) is higher than the STA-T (36.7%) and Tweed LGA (44.3%).

This is reflective of the higher number of retirees in the STA-S and middle aged couples in the STA.

5.3.4 Household Ownership

There is a significantly higher proportion of dwellings in the STA-S that are fully owned or being purchased (79.6%) than the STA-T (64.8%) and Tweed LGA (68.7%).

Irrespective of household ownership, residents of the catchments conducting weekly and/or fortnightly supermarket shopping will benefit from the convenience provided by the supermarket on the subject site.

5.3.5 Average Household Income

The average household income of the STA-S in June 2017 dollars is \$74,300. This is less than the STA-T with \$79,600 but higher than the Tweed LGA with \$71,200.

The retail offer in the Town Centre will increase competition, choice and range for residents of the catchment areas.

5.4 Expenditure Characteristics

The following table is based on the RPS household expenditure model and assumptions of the future demographic profile of Cobaki residents (the PTA). The expenditure estimates are derived by assessment of the estimated household income of the catchments and the population projections.

The average annual total household retail expenditure in the PTA is estimated at \$28,200, which is greater than the STA-S with \$25,800 and the same as STA-T. The expenditure potential is detailed in the following table.

Table 3 – Expenditure Projections

Avg Annual Household Expenditure	PTA Cobaki	STA South	STA Tugun
Convenience	\$15,048	\$13,950	\$15,048
Clothing and Footwear	\$2,191	\$1,961	\$2,191
Large Floorspace	\$5,708	\$5,263	\$5,708
Other Retail	\$1,412	\$1,352	\$1,412
Food and Beverage	\$3,814	\$3,305	\$3,814
Total	\$28,173	\$25,832	\$28,173

Forecast Retail Expenditure Potential (\$m)**PTA - Cobaki**

	2016	Cobaki - Build Out	Total Area - Build Out
Households	0	5,500	5,500
Convenience	\$0.00	\$82.76	\$82.76
Clothing and Footwear	\$0.00	\$12.05	\$12.05
Large Floorspace	\$0.00	\$31.40	\$31.40
Other Retail	\$0.00	\$7.77	\$7.77
Food and Beverage	\$0.00	\$154.95	\$154.95
Total	\$0.00	\$288.93	\$288.93

STA South

	2016	Cobaki - Build Out	Total Area - Build Out
Households	1,922	2,000	4,722
Convenience	\$26.81	\$27.90	\$65.87
Clothing and Footwear	\$3.77	\$3.92	\$9.26
Large Floorspace	\$10.11	\$10.53	\$24.85
Other Retail	\$2.60	\$2.70	\$6.39
Food and Beverage	\$49.64	\$51.66	\$121.97
Total	\$92.92	\$96.72	\$228.33

STA Tugun

	2016	Cobaki - Build Out	Total Area - Build Out
Households	1,952	2,011	2,071
Convenience	\$29.37	\$30.26	\$31.16
Clothing and Footwear	\$4.28	\$4.40	\$4.54
Large Floorspace	\$11.14	\$11.48	\$11.82
Other Retail	\$2.76	\$2.84	\$2.93
Food and Beverage	\$7.45	\$7.67	\$7.90
Total	\$55.00	\$56.65	\$58.35

Source: RPS, all figures June 2017 dollars

The projected household expenditure in the PTA at build-out is \$289 million.

The 2016 household expenditure in the STA-S was \$93 million. This is anticipated to increase to \$97 million when Cobaki is built out and \$228 million when the total area reaches capacity.

The implementation of the Boyd Street interchange is anticipated to provide inflow patronage from people travelling on their way home along the Tugun Bypass. This is anticipated to increase the level of expenditure by residents of the STA-S in the Cobaki centres.

5.5 Implications

At capacity, the Cobaki community will have a population of 13,000 (or so) people in 5,500 dwellings. In the short to medium term, the Cobaki centres will also cater to residents of the STA-South and the market share from this group will decline when a supermarket-anchored shopping centre is established at Bilambil Heights.

Traffic using the Cobaki Parkway will support a broader range of uses at the neighbourhood centre than would otherwise be the case.

6.0 Market Analysis

This section will provide an initial assessment of the viability, risk and scale of the proposed development on the subject site.

6.1 Factors shaping demand

The factors that will influence the scale and inclusions at the retail centres within the Cobaki master planned community include:

- The community will be residential in nature with no major sources of employment.
- The residents will be required to leave the community to conduct higher order shopping, drop the children at high school and (for most) go to work.
- The ability to access Cobaki via the motorway will assist sales rates within the estate. However, the scale of the retail footprint will be linked to the local population, and the improved accessibility will not increase the external patronage base for the centres in Cobaki (other than greater exposure to residents of the STA-S).
- The present Tweed Shire planning sees the Cobaki Town Centre and the Bilambil Heights Town/Village Centre fulfilling the same general function with the same general footprint. Both are currently intended to be supermarket anchored shopping centres. The superior interceptory location of Cobaki will ensure this centre is the larger of the two. The Cobaki Town Centre is the best location to provide a higher order centre in keeping with the needs of the community and the requirement to avoid unnecessary impact/duplication.
- The PTA for the Cobaki Town Centre will consist of the urban growth area of Cobaki.
- The Cobaki Town Centre will also service the needs of residents of Tugun and Bilinga. These groups will respond to the appeal and convenience of the centre, particularly for supermarket shopping.
- The centres at Cobaki will also serve the residents of Bilambil Heights and others that will use the Cobaki Parkway. The rate of future population growth in this area is uncertain as much of the land is in fragmented ownership and the funding and provision of infrastructure are unlikely to be simple and straightforward. The patronage derived from the STA-S over the next ten years is expected to be similar to the levels that can be derived from the present population.
- The neighbourhood centre is located on the wrong side of the road to maximise patronage from traffic travelling along the Cobaki Parkway (it is opposite the left hand 'go home' side).

6.2 Opportunity Analysis

The following table provides an overview of the retail opportunities available for the Town Centre within the future Cobaki community.

Use	Function	Scale	Suitability of Use	Timing and Triggers	Risk
Discount Department Store (DDS)	Serves the retail needs of the defined PTA and STA catchment.	5,000 Sq M to 6,000 Sq M	Possible	At build out, the total Cobaki catchments will have a population of about 23,000. This will support a new (small format KMart – an example is the store at Oxenford). The inclusion of a DDS will increase market share derived from trade area residents and will ensure the Cobaki centre is a larger than any future centre in Bilambil.	Conflicts with the Tweed Shire Council Retail Policy. Changing this policy to allow a DDS at Cobaki is considered unlikely in the short to medium term.
Bulky Goods Retail	Destination retail, through specific single-purpose trips of patrons.	N/A	Not Suitable	Bulky goods retail is not considered a suitable use for the subject site as it will not have the required population base and conflicts with the major district centre of Tweed Heads South.	The development of bulky goods retail on the subject site would conflict with the Tweed Shire Council Retail Policy.
Supermarket	Caters to the weekly and/or fortnightly shopping needs of local residents.	3,500 Sq M (full-line supermarket) 1,500 Sq M (Aldi)	Suitable	The Cobaki catchment of 13,200 people will be supplemented by the 10,000 residents of Tugun, Bilambil and nearby areas (The STA-s and STA-T). The population of the PTA will be able to support a full-line supermarket and Aldi supermarket when the community reaches build out. The full line supermarkets will be viable when: Cobaki is 50% occupied Or Cobaki is 35% occupied, and the Cobaki Parkway extends to the south allowing patronage from Bilambil Heights. Can be established when the first supermarket is developed.	A full line supermarket on the subject site will be in line with the Tweed Shire Retail Strategy, which states that most of the demand for five supermarkets between 2004 and 2024 is to be located in expansion areas such as Cobaki and Bilambil Heights.
Tavern	Caters to local residents	800 Sq M	Suitable		The success will be dependent upon the appeal of the operator.
Commercial office and medical	Caters to local residents	1,500 Sq M	Suitable	The commercial office and medical uses should be developed in line with population growth, and the majority of occupants will be service professionals catering to local demand and/or local businesses.	Local commercial office and medical uses will be established in line with population growth and identification of Cobaki as a suitable venue for local business.
Fast Food	National brands with drive through	400 Sq M – stand alone building	Suitable	Should be developed in the town centre as the neighbourhood centre does not provide sufficient accessibility or traffic volume. Developed as part of the second (or later) stage (that includes the second supermarket).	A high profile location is required – catering to Cobaki residents, town centre patrons and traffic using the Cobaki Parkway. The national fast food operators are unlikely to be viable if any of these patronage groups cannot easily access the site.

Use	Function	Scale	Suitability of Use	Timing and Triggers	Risk
Service Station	Neighbourhood scale service station or supermarket operated facility.	Up to 4,000 Sq M site.	Suitable	Cobaki can support up to 3 service stations with: 1 or 2 in the town centre (with at least one of these being a supermarket brand). 1 in the neighbourhood centre.	The primary risk is one of accessibility. While the supermarket service station will function (relatively) independently of passing traffic, the other two will need to be well exposed and easily accessible from the Cobaki Parkway. Accessibility and exposure will be very important for the neighbourhood centre site. The neighbourhood site will need high traffic volumes to appeal to an operator.
Child Care	Child care catering to local residents	1,000 Sq M site for each 75 place centre	Suitable	Cobaki can host up to 3 (75 Place) child care centres with: 1 or 2 in/near the town centre. 1 in/near the neighbourhood centre.	The success will be dependent upon the appeal of the operator. The scale of the centres will be shaped by the demographic profile of the community. A concentration of families will increase the demand for child care.

6.3 Town Centre - Recommendations

6.3.1 Role and Function

The Cobaki Town Centre will function as a supermarket anchored centre with one full line supermarket and a limited line supermarket (Aldi). The retail core will be supported by food and beverage outlets (tavern, fast food, etc), commercial office space (includes medical) and related uses (service station and child care).

The town centre will be scaled to the needs of the primarily residential catchment. The recommended uses will be 8,000 Sq M to 9,500 Sq M of retail and commercial floorspace in addition to child care, residential and similar uses. The recommendations differ from earlier iterations of his report as the development feasibility seeks to minimise risk while considering recent retail trends.

6.3.2 Retail -Scale and staging

If established using contemporary trends, the town centre will contain to 6,000 Sq M to 7,500 Sq M of retail space:

- Supermarket, full line – 3,000 Sq M to 3,600 Sq M
- Supermarket, limited line – 1,300 Sq M to 1,600 Sq M
- Specialities and food service – 1,000 Sq M to 1,500 Sq M
- Tavern – 800 Sq M (approx.)

The first full line supermarkets will be viable when Cobaki is 50% occupied or when Cobaki is 35% occupied, and the Cobaki Parkway extends to the south allowing patronage from Bilambil Heights. The second supermarket (and related retail) will be viable when Cobaki approaches capacity, the Boyd Street interchange is constructed, and the Cobaki Parkway extends to the south allowing patronage from Bilambil Heights.

6.3.3 Commercial and Medical

The town centre will viably support an estimated 1,500 Sq M of commercial space. This will primarily take the form of medical and service professionals.

The medical and office uses could commence in retail shopfront space and move into purpose built offices when that investment can be justified by actual activity. Alternatively, the offices could occupy the ground and first-floor space in any medium density residential built in the town centre.

6.3.4 Medium and High Density in the Town Centre

It is assumed that 500 plus units could be established at some density in the town centre; should it be assessed that this product is viable. The introduction of higher density residential will have a greater qualitative impact than quantitative on the way the town centre is designed and used.

6.3.5 Child Care

Planning should allow for two by 75 child care centres in/near the town centre and one by 75 place child care in/near the neighbourhood centre. The town centre is preferred for the major concentration of child care centres as it will be accessed early in the development program and the initial (single) child care can be expanded over time in line with demand.

6.3.6 Fast Food

It is likely that a national fast food chain will locate in the town centre. The town centre location is preferred over the neighbourhood centre, as a viable national operation will require access to local residents, town centre patrons and traffic on the Cobaki Parkway. The neighbourhood centre is not convenient for the majority of future Cobaki residents, and it is located on the wrong side of the road for 'go home' convenience.

6.3.7 Service Stations

Planning should allow for at least one service station in the town centre and one in the neighbourhood centre.

A supermarket service station in the town centre will function (relatively) independently of passing traffic; the other two will need to be well exposed and easily accessible from the Cobaki Parkway. Accessibility and exposure will be very important for the neighbourhood centre site. The neighbourhood site will need high traffic volumes to appeal to an operator.

6.4 Neighbourhood Centre

The viable scale of the neighbourhood centre will be driven by the following:

- The proportion of Cobaki residents who find the site convenient for impulse retail purchases (including fuel and fast food).
- The scale and success of the town centre. A greater proportion local residents will favour the neighbourhood centre site for convenience retail if the town centre is busy and popular.
- The volume of traffic using the Cobaki Parkway to travel to areas south of Cobaki.
- The ease of accessibility of the site (considering it is not on the 'go-home' side of the road).

At best, it is assessed the neighbourhood centre will host 1,000 Sq M to 1,200 Sq M retail uses with a service station, small convenience supermarket, food services and local service retail being the dominant tenants. At worst (in the absence of a service station suitable access and sufficient passing traffic) the site might not viably support any retail or related uses.

6.5 Scale and Location of the Town Centre

The recommended size of the town centre zone is 6 to 10Ha. This will accommodate the recommended retail and commercial uses, 2 child care centres and a range of residential uses. The town centre should be located on the south west corner of Sandy Lane and the Cobaki Parkway. This location will increase the level of convenience for local residents and maximise the opportunity to integrate the retail and commercial uses with surrounding residential development.

Appendix – Demographic Profile 2016 Census

Demographic Profile	STA Tugun		STA South		Tweed Heads and Tweed Heads South		Tweed Shire	
Total Persons	4,685		4,727		43,199		91,371	
Age								
0 to 4	299	6.4%	265	5.5%	1,992	4.6%	4,779	5.2%
5 to 14	532	11.4%	547	11.5%	4,121	9.5%	10,546	11.5%
15 to 19	245	5.3%	278	5.8%	2,166	5.0%	4,990	5.5%
20 to 24	271	5.8%	208	4.4%	2,027	4.7%	3,929	4.3%
25 to 34	636	13.6%	416	8.7%	3,958	9.2%	8,219	9.0%
35 to 44	632	13.6%	542	11.4%	4,335	10.0%	10,268	11.2%
45 to 54	570	12.2%	610	12.8%	5,099	11.8%	11,917	13.0%
55 to 64	645	13.8%	712	14.9%	6,045	14.0%	13,583	14.9%
65 to 74	405	8.7%	655	13.7%	6,452	14.9%	12,026	13.2%
75 to 84	263	5.6%	396	8.3%	4,661	10.8%	7,535	8.2%
85 years and over	164	3.5%	146	3.1%	2,342	5.4%	3,581	3.9%
Language Spoken at Home								
English Only	4,035	93.2%	4,287	96.3%	38,104	94.6%	81,054	95.5%
Other	296	6.8%	167	3.7%	2,185	5.4%	3,845	4.5%
Household Structure								
Couple family with no children	431	36.7%	596	46.4%	5,425	47.2%	10,759	44.3%
Couple family with children under 15	336	28.6%	315	24.5%	2,350	20.5%	5,969	24.6%
Couple family with no children under 15	148	12.6%	182	14.2%	1,277	11.1%	2,783	11.5%
Couple family with children - total	472	40.2%	486	37.8%	3,635	31.7%	8,751	36.0%
One parent family with children under 15	142	12.1%	100	7.8%	1,016	8.8%	2,172	8.9%
One parent family with no children under 15	112	9.5%	96	7.5%	1,237	10.8%	2,287	9.4%
One parent family	261	22.2%	195	15.2%	2,254	19.6%	4,462	18.4%
Other family	22	1.9%	6	0.5%	173	1.5%	312	1.3%
Total Families	1,175		1,285		11,482		24,290	
Household Income								
Average Weekly - Sept 2016 \$	\$ 1,507.95		\$ 1,408.60		\$ 1,251.37		\$ 1,350.00	
Average Weekly - Current \$ (June 2017)	\$ 1,525.82		\$ 1,425.29		\$ 1,266.20		\$ 1,366.00	
Average Annual - Sept 2016 \$	\$ 78,624.77		\$ 73,444.47		\$ 65,246.39		\$ 70,388.97	
Average Annual - Current \$ (June 2017)	\$ 79,556.51		\$ 74,314.82		\$ 66,019.59		\$ 71,223.12	
Average Number of Cars	1.73		1.82		1.56		1.67	
Mortgage Repayment - Monthly								
Average Repayment - Sept 2016 \$	\$ 1,741.30		\$ 1,723.86		\$ 1,719.99		\$ 1,813.75	
Average Repayment - Current \$ (June 2017)	\$ 1,761.94		\$ 1,744.29		\$ 1,740.37		\$ 1,835.25	
Rent - Weekly								
Rent - Sept 2016 \$	\$ 371.37		\$ 350.98		\$ 334.41		\$ 339.43	
Rent - Current \$ (June 2017)	\$ 375.77		\$ 355.14		\$ 338.37		\$ 343.45	
Persons per Household								
Separate house	2.71		2.53		2.61		2.68	
Semi detached row or terrace house townhouse etc with One storey	1.70		2.02		1.84		1.88	
Semi detached row or terrace house townhouse etc with Two or more storeys	2.30		2.62		2.04		2.11	
Semi detached row or terrace house townhouse etc with Total	2.13		2.33		1.90		1.96	
Flat or apartment In a one or two storey block	1.63		1.37		1.70		1.66	
Flat or apartment In a three storey block	1.95		1.55		1.76		1.82	
Flat or apartment In a four or more storey block	2.03				1.78		1.78	
Flat or apartment Attached to a house					2.33		2.80	
Flat or apartment Total	1.76		1.40		1.73		1.73	
Other dwelling Caravan					1.42		1.48	
Other dwelling Cabin houseboat					1.48		1.58	
Other dwelling Improvised home tent sleepers out Dwellings					1.96		2.12	
Other dwelling House or flat attached to a shop office etc Dwellings			2.33		2.30		2.62	
Other dwelling Total Dwellings			3.20		1.52		1.58	
Dwelling structure not stated	2.14		2.67		1.93		1.99	
Total Dwellings	2.40		2.46		2.25		2.39	
Dwelling Structure								
Separate house	997	57.5%	1,619	91.8%	9,656	54.7%	22,929	65.3%
Semi detached row or terrace house townhouse etc with One storey	143	8.2%	41	2.3%	3,331	18.9%	4,243	12.1%
Semi detached row or terrace house townhouse etc with Two or more storeys	400	23.1%	34	1.9%	1,477	8.4%	2,248	6.4%
Semi detached row or terrace house townhouse etc with Total	543	31.3%	73	4.1%	4,808	27.2%	6,489	18.5%
Flat or apartment In a one or two storey block	82	4.7%	52	2.9%	1,216	6.9%	2,051	5.8%
Flat or apartment In a three storey block	66	3.8%	11	0.6%	842	4.8%	1,368	3.9%
Flat or apartment In a four or more storey block	32	1.8%	0	0.0%	650	3.7%	751	2.1%
Flat or apartment Attached to a house	0	0.0%	0	0.0%	3	0.0%	5	0.0%
Flat or apartment Total	187	10.8%	63	3.6%	2,729	15.5%	4,180	11.9%
Other dwelling Caravan	0	0.0%	0	0.0%	166	0.9%	635	1.8%
Other dwelling Cabin houseboat	0	0.0%	0	0.0%	183	1.0%	489	1.4%
Other dwelling Improvised home tent sleepers out Dwellings	0	0.0%	0	0.0%	27	0.2%	42	0.1%
Other dwelling House or flat attached to a shop office etc Dwellings	0	0.0%	3	0.2%	20	0.1%	42	0.1%
Other dwelling Total Dwellings	0	0.0%	5	0.3%	399	2.3%	1,211	3.5%
Dwelling structure not stated	7	0.4%	3	0.2%	59	0.3%	282	0.8%
Total Occupied Dwellings	1,734	100.0%	1,763	100.0%	17,651	100.0%	35,091	100.0%
Occupied private dwellings	1,734	91.7%	1,763	91.5%	17,651	89.8%	35,091	89.3%
Unoccupied private dwellings	131	6.9%	139	7.2%	2,014	10.2%	4,208	10.7%
Total private dwellings	1,891		1,926		19,657		39,298	
Dwelling Ownership								
Fully owned	469	26.8%	824	46.2%	7,477	42.4%	14,166	40.4%
Being purchased directly	664	38.0%	596	33.4%	4,409	25.0%	9,945	28.3%
Rented	538	30.8%	294	16.5%	4,873	27.6%	9,413	26.8%
Other Tenure	3	0.2%	8	0.4%	264	1.5%	421	1.2%
Not Stated	50	2.9%	48	2.7%	621	3.5%	1,138	3.2%
Total	1,749		1,784		17,637		35,089	