Lake Macquarie City Council

Development Contributions Plan

Residential and Employment Generating Development Projections

Belmont Contributions Catchment

2015 – 2030

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1 Introduction

1.1 Purpose and Aims of this Report

Development projections are a crucial component of development contributions plans. They provide the framework to assess the impact of new development on existing infrastructure, and guidance on the location and scale of additional infrastructure to support new development.

This report provides supporting information for the Belmont Development Contributions Plan. In summary, this report:

- Outlines the context of the Belmont Catchment (the Catchment);
- Summarises the relevant strategic planning framework and environmental planning instruments;
- Describes the nature of the existing residential and employment generating development and population of the Catchment; and
- Estimates the future residential and employment generating development likely to occur within the Belmont Catchment from 2015 to 2030.

In order to achieve the above, this report:

- Briefly outlines the context and the Belmont Contributions Catchment;
- Summarises the relevant background material, key facts, and issues;
- Identifies the existing nature of development in the Belmont Contributions Catchment;
- Identifies and discuss future development opportunities;
- Estimates the residential development that is likely to occur within the catchment; and
- Estimates the employment-generating development that is likely to occur within the catchment.

1.2 Development Projection Principles

Development projections are estimates of the future size, distribution, and characteristics of development within specific areas. They can included both residential, and employment generating development. They are established by applying mathematical models and expert knowledge of likely development trends to a base.

Development projections provide information about changes in development over space and time, but they are not predictions of the future, nor are they targets. Development projections give an idea of what is likely to occur if current development trends continue, and opportunities for development are taken up by the market.

Development projections differ from population projections. Population projections are estimates that result from certain assumptions being made about future trends in fertility, mortality, and migration patterns. Household formations and dwelling numbers are modelling based on these assumptions. From here, household expenditure rates can be applied to determine the employment generating floorspace required to support the population.

Development projections, on the other hand, take a dwelling or building first approach. They analyse planning constraints and market trends, and estimate the likelihood of development

of land occurring within a certain timeframe. Once dwelling or floorspace yields are estimated, average occupancy rates are applied to derive what the likely population would be within these new dwellings.

Population projections are most effective at the local government area spatial level and above. When applied to small areas, such as the Belmont Catchment level, birth rates, death and migration patterns become unreliable and the margin for error increases substantially. For this reason, a development projection model has been adopted for the use in the Lake Macquarie Development Contributions Plans.

Due to the nature of development projections, it is recommended that these figures be reviewed every five years. This is to ensure any changes in development trends, or new rezoning proposals are included.

1.3 Summary of Development Projections

This report estimates the likely residential and employment generating development that is likely to occur with the Belmont Contributions from 2015 to 2030. In summary, there is forecast to be an increase in private residential accommodation in the Belmont Contributions Catchment resulting in an additional 7,252 persons.

Suburb	Existing Dwellings (2015)	Existing Persons (2015)	Projected Dwellings (2030)	Projected Persons (2030)	Total Dwellings (2030)	Total Persons (2030)
Totals	12,105	26,107	3,043	7,252	15,148	33,359

Table 1 Belmont Catchment - Residential Development Summary

Dwelling growth will occur in both greenfield and infill development opportunities in various locations across the Catchment. The additional 7,252 persons represent a population increase of 27.8% over the life of the plan.

An additional 32,348² of commercial gross floor area (GFA) creating 1,544 jobs is likely to occur within the catchment by 2030. Industrial GFA is estimated to expand with an additional 1,591m² creating 18 jobs.

	2015 GFA (m²)	Projected GFA	2030 GFA (m²)	2015 Employees	Projected Employees	2030 Employees
Commercial	125,022	32,348	157,370	4,788	1,544	6,332
Industrial	13,667	1,591	15,258	324	18	342
Totals	**138,689**	**33,939**	**172,628**	**5,112**	**1,562**	**6,674**

Table 2 Belmont Catchment - Employment Generating Development Summary

1.4 Disclaimer

While every reasonable effort has been made to ensure that these development projections are correct at the time of release, Lake Macquarie City Council, its agents and employees, disclaim any and all liability to any person in respect to anything or the consequences of anything done or omitted to be done in reliance upon the whole, or any part of these projections.

2 Background and Context

2.1 The Project

The principle objective of the project is to prepare a set of development projections for the Belmont Contributions Catchment. These projections inform the development of the Belmont Contributions Plan. This report estimates the future residential and employment generating development within the Catchment from 2015 to 2030.

This report form a collection of four background studies that informs the preparation of the Belmont Contributions Plan.

2.2 Study Area

The Lake Macquarie LGA comprises a total land area of approximately 684 square kilometres. In 2015 the population of the City was 201,811 persons was the largest LGA in the Lower Hunter.

The extent of the Belmont Contributions Catchment is shown in Figure 1 below. The Catchment is located on the eastern side of the Lake Macquarie Local Government Area (LGA).

The Catchment is bound by the Charlestown Contributions Catchment to the north, and the Central Coast LGA to the south.

Figure 1 Belmont Contributions Catchment - Study Area

The Belmont Catchment includes the following suburbs:

Suburb	
Belmont	Marks Point
Belmont North*	Murrays Beach
Belmont South	Nords Wharf
Blacksmiths	Pelican
Cams Wharf	Pinny Beach
Catherine Hill Bay	Swansea
Caves Beach	Swansea Heads

Table 3 Suburbs within the Belmont Catchment

* Denotes partial suburb

2.3 Hunter Regional Plan

The Hunter Regional Plan provides the overall strategic framework for the future of the Hunter. The vision is create a leading regional economy in Australia.

The Hunter Regional Plan estimates an additional 24,450 persons in 13,700 dwellings within Lake Macquarie to 2036. In addition, the Plan also forecasts an additional 11,741 jobs will be created within the City.

Both Belmont and Swansea are identified within the Hunter Regional Plan as centres of local significance. Local centres of significance provide jobs and services such as shopping, dinging, entertainment, health and personal services to meet the daily and weekly needs of the local community.

2.4 Lifestyle 2030 Strategy

The Lifestyle 2030 Strategy (the Strategy) is Council's key land use planning document which provides the long-term direction for the overall development of the City. It also describes Council's high level policies for managing private and public development in Lake Macquarie.

The Strategy incorporates the core values of Sustainability, Equity, Efficiency, and Liveability and a hierarchy of centres based on levels of service and function. Centres are intended to increasingly act as the focus for commercial and retail activity, service delivery, employment opportunities, public transport, meeting places, medium density housing, and mixed-use development.

The Strategy contains several relevant key aims, including:

- To reinforce and strengthen Centres across the City so that a wide range of commercial and community services may be provided;
- Provide local employment opportunities for residents and to promote economic development consistent with the LGA's natural, locational and community resources;
- Guide the development of urban communities that are compact, distinct, and diverse with a range of housing types and activities;
- Develop attractive and liveable urban areas in the LGA, which reflect its physical and natural environment, and visual character; and

- Integrate land use with the efficient provision of public and private movement systems.

The Strategy identifies the Belmont and Swansea as town centres which:

- Provides a ranger of mixed use, retail, and commercial activities, professional social services, and community facilities.
- Has medium density residential within and adjoining the centre
- Serves a number of surrounding business and residential communities

2.5 Lake Macquarie Local Environmental Plan 2014

Lake Macquarie Local Environmental Plan 2014 (*LMLEP 2014*) came into force in 2014. *LMLEP 2014* contains standards that apply to development within the City. The LEP also establishes the types of development that may be permitted, the maximum building heights, and minimum subdivision requirements for each particular parcel of land.

The development standards within *LMLEP 2014* underpin the development projections within this report. Land with an active Local Environmental Plan amendment that had reached the exhibition milestone as part of Council's LEP amendment procedure have also been included as part of the development projections within this report.

2.6 Belmont Town Centre Area Plan

Part 10 of Lake Macquarie Development Control Plan 2014 – Belmont Town Centre Area Plan provides guidance for the future development of the Belmont town centre.

In the future, Belmont could become a compact, higher density, retail, business and residential centre focused on the area between the Pacific Highway and the lake foreshore. Office space and residential apartments would occupy upper levels above town centre retail. Pedestrian movement from the Pacific Highway to the lake foreshore could be pleasant and interesting. Re-development of the existing car park site on Macquarie Street would provide active street frontages to Macquarie Street, Edgar Street and Thomas Street.

The proposed Thomas Street extension would be a shared pedestrian and vehicle zone. Memorial place would be a sunny public place with the memorial and the forecourt of the Post Office, activated by a lively mix of small shopfronts and a cafe. Apartment development on Brooks Parade would also provide a mix of café, restaurant, and small scale retailing at street podium level. This would make for an attractive residential area close to the centre.

Development within the B2 Zone core of the town centre should be of a perimeter block form built to the street boundary and side boundaries, to provide a continuous pedestrian strip.

Additional height is provided west of the Pacific Highway to maximise yields on sites, with good visual and physical access to the lake. Vehicle access points in the core area are restricted, in order to maintain pedestrian amenity and active street frontage.

To ensure lake glimpses between buildings, development in Brooks Parade as far north as Marks Street should be taller, freestanding blocks with a compact footprint, low podium and generous landscape areas. Other development on B2 zoned land should be smaller scale 2-3 storey with smaller setbacks and generous tree planting areas at the rear. Buildings at the

northern end of the Pacific Highway should maximise facade length, with floor space built to the street frontage.

Belmont development character should reflect the high amenity waterside location and its popularity as a social and recreational destination on the lake. Balconies and terraces should be oriented for water views or for sun access, and provide recessed areas sheltered from prevailing winds and westerly sun. Lightweight materials, the use of light but muted colours, awnings and moveable screening all add to the character of a contemporary waterside destination. Buildings on the Pacific Highway should incorporate heavier masonry facades and smaller glazing areas to manage noise and air quality. Upper residential levels should be well set back and lighter weight in appearance.

The outcomes Belmont Town Centre Area Plan have been considered in the development projections within this report.

3 Existing Development

Part 3 of this report summaries the existing residential and employment generating development within the Belmont Catchment. The estimated population at the time (30 June, 2015) and employment generating floorspace included in the Employment Generating Land Use Survey is considered existing development.

Applications for development that had been determined, but construction had not been completed as of 30 June 2015 were assessed as new development for the purpose of this report.

3.1 Existing Residential Population

The Australian Bureau of Statistics' 2011 Census underpins the existing development component of this report. The following sections provides an overview of the resident population of the Belmont Catchment at the time of the Census and indexed to 30 June 2015 to reflect the estimated population growth during this period.

For the purpose of this report, a dwelling includes both private and non-private dwellings. Non-private dwellings includes dwellings such as residential care facilities, beds within hospitals, and residential colleges.

3.1.1 Demographics

It is estimated that the total population of the Belmont Catchment in 2015 was 26,107 people. This equates to approximately 13% of the population of the LGA. Persons in private dwellings equated to 25,848 people, with the remaining 259 people within non-private dwellings.

3.1.1.1 Population by Suburb

The average population across all the suburbs (that include residential areas) within the Catchment was 1,865 persons. In 2015, the suburbs of Belmont, Swansea, and Caves Beach contained 60% of the total population of the catchment as per Figure 2 below.

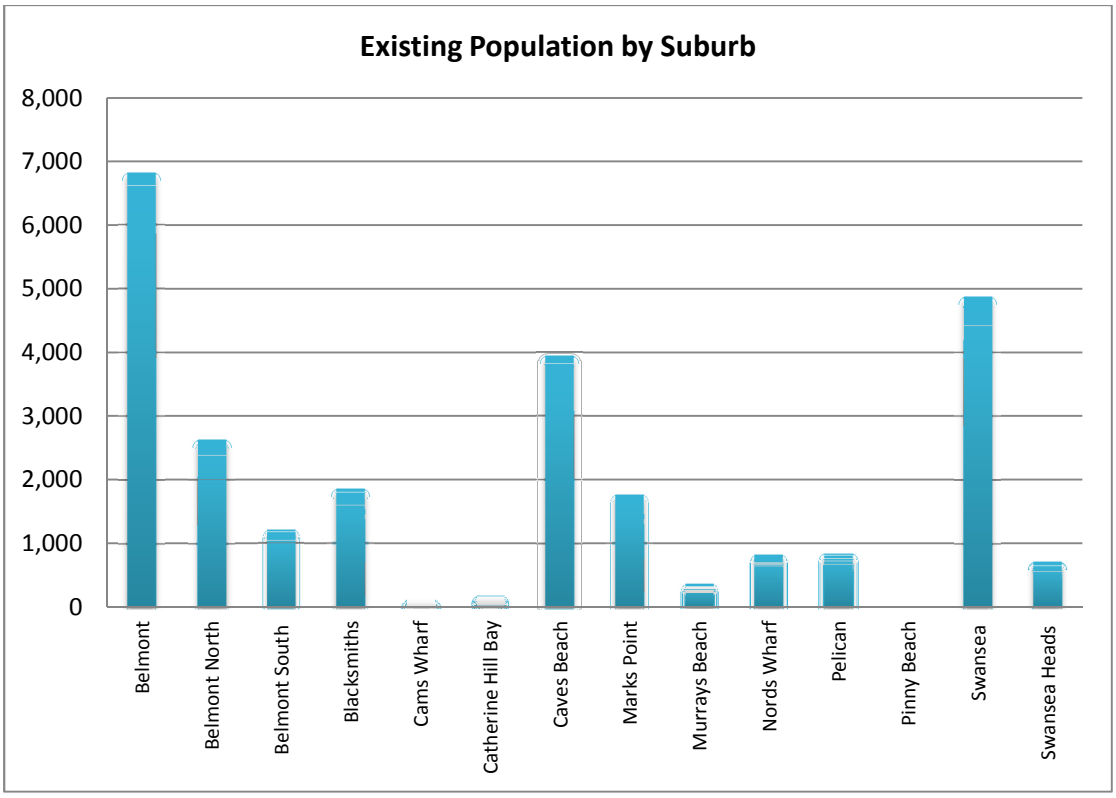

Figure 2 Existing Population by Suburb

3.1.1.2 Age Profile

The Catchment has an older population than the LGA with a median age of 44 compared to 41. It is the suburbs around the lake channel that are the older areas, such as Swansea (median age of 49), Blacksmiths (46), and Pelican (45). Those areas that have a lower median age are Murrays Beach (39) and Belmont South (39).

The suburbs that have a high proportion of those aged under 10 years of age and those aged 25-40, indicating that they consist of predominately younger families, include Murrays Beach, and Belmont North;

Swansea Heads, Nords Wharf, Caves Beach and Belmont South have a high proportion of those aged 10-19 years, and 40-54 years, indicating that these suburbs consist predominately of older families;

The catchment has significantly more people aged 65 years and over, accounting for 21.4% of the population, compared to 18.4% for Lake Macquarie. Suburbs that have a high proportion of people aged over 65 years include Swansea and Blacksmiths;

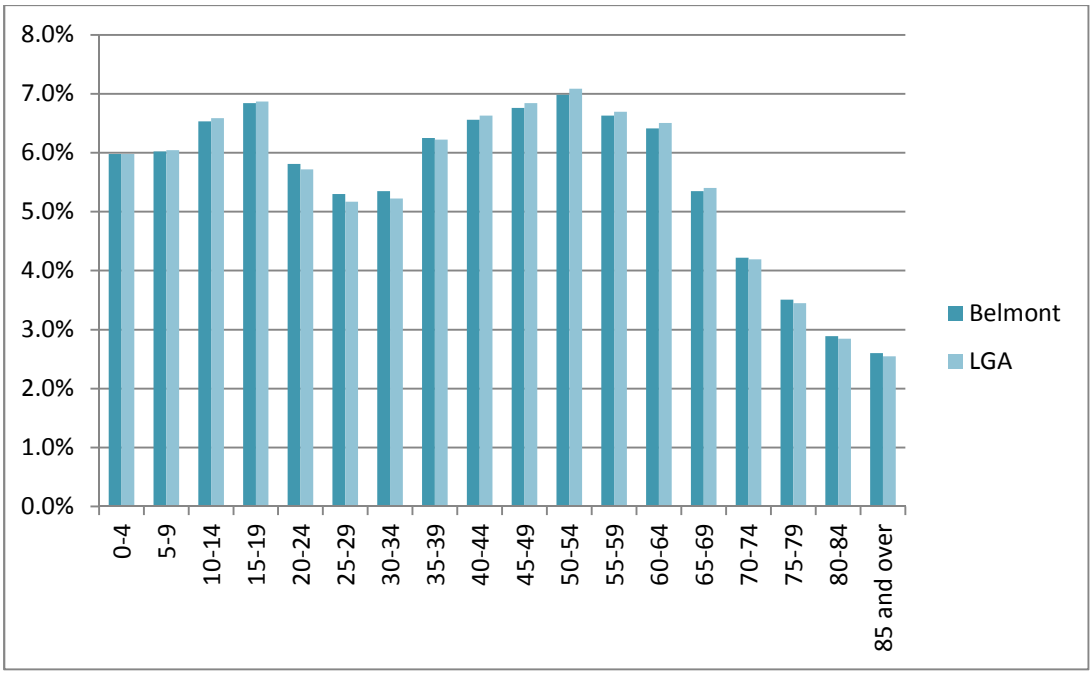

Figure 3 Age Profile – 5 Year Groupings (2011 Census)

3.1.2 Dwellings

There were an estimated 12,105 dwellings within the Catchment in 2015. Of these dwellings, 80% were detached houses, with the remainder being townhouses and villas (10%), one – two storey apartments (7%), and apartments in multi storey buildings (3%).

35% of dwellings within the Catchment were owned outright, with 34% owned with a mortgage. The next largest group were private rental dwellings at 29% of the housing stock. The residual consists of dwellings being occupied rent-free, under a life tenure scheme, or under a rent/buy scheme.

The occupancy rate per dwelling within the Catchment was 2.15, which is lower than the citywide average occupancy rate of 2.51.

3.1.3 Household Travel Destinations

The Household Travel Survey is an annual state-wide survey conducted by the Bureau of Transport Statistics. The Household Travel Survey provides insight into journeys being made within, to, and from Lake Macquarie. Specifically, data is collected on the purpose of journeys, trip time, distance, and mode of travel.

The purpose of journey data (Figure 4) for Lake Macquarie indicates that 23.7% of trips were for the purpose of social recreation. Shopping (20%) was the next highest trip purpose. Work related trips (commute and work related business) equated to 19.6% of trips within the City.

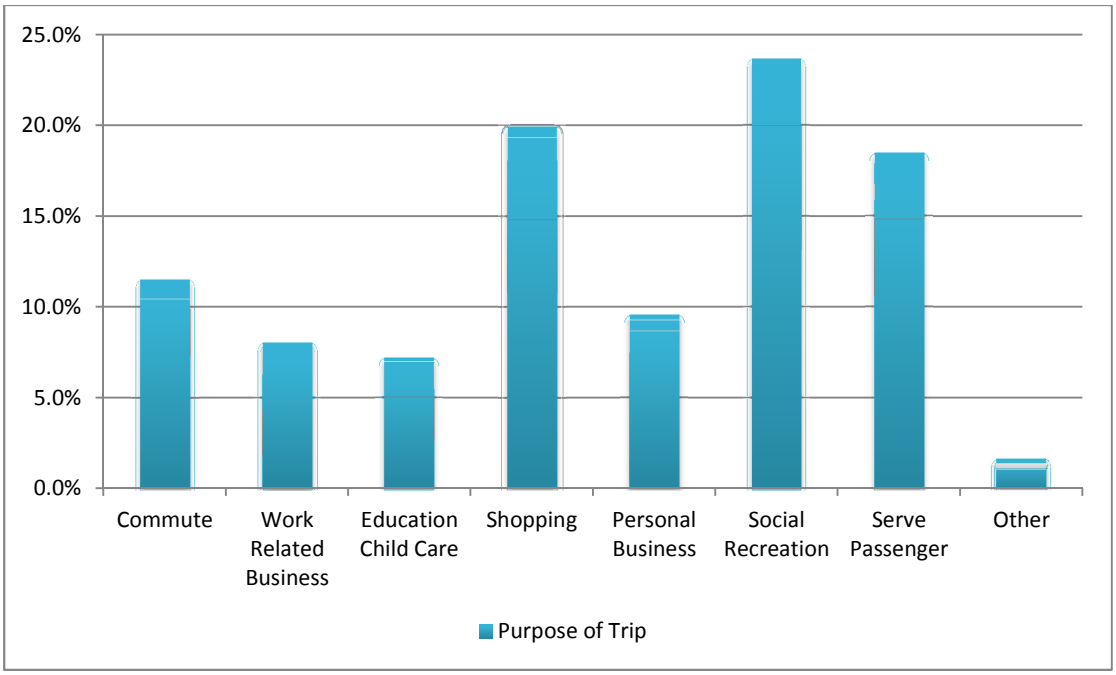

Figure 4 Household Travel Survey - Purpose of Trip

84% of all trips within the LGA were taken using a car (Figure 5), either as a vehicle driver or as a vehicle passenger. The second highest mode of transport in the survey was walking at 10% of all trips, followed by public transport (train and bus) at 4%.

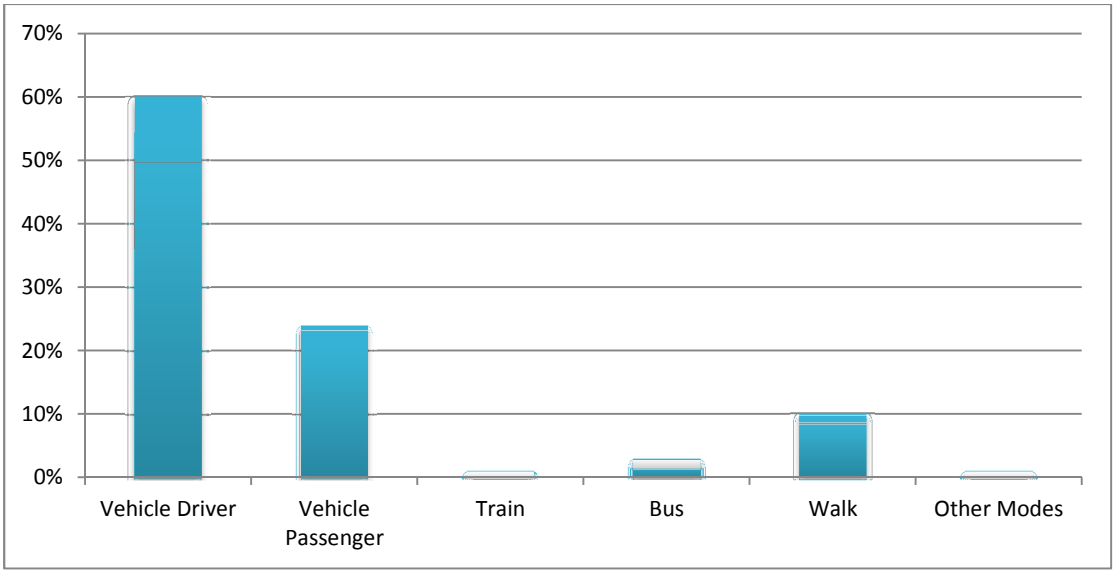

Figure 5 Household Travel Survey – Mode Split

It should be noted that the sample rate of the Household Travel Survey while statistically valid for the LGA, is too low to be applied to smaller areas such as the Belmont Catchment. Therefore, a Citywide approach to travel purpose and mode split has been adopted for the purpose of development contributions.

3.1.4 Journey to Work

Journey to work data shows how many residents work locally, and how many commute out of the Catchment or beyond the City limits.

For Lake Macquarie an increasing number of people both work, and live in the City. Figure 6 below shows the workplace destinations for residents in the 2011 Census. The chart indicates that 38,956 resident workers or 47% of the total journey to work population worked in Lake Macquarie. Newcastle, the major job centre of the Hunter, was the employment destination for 28,378 (34%) of resident workers. Other destinations in the Lower Hunter outside of the City and Newcastle accounted for 7% of total work movements, with 8% travelling to areas outside of the above areas. 3,824 (5%) of the resident workers had no fixed work address at the time of the Census. This category often includes workers in the trades, or those whose employment involves travel to various locations.

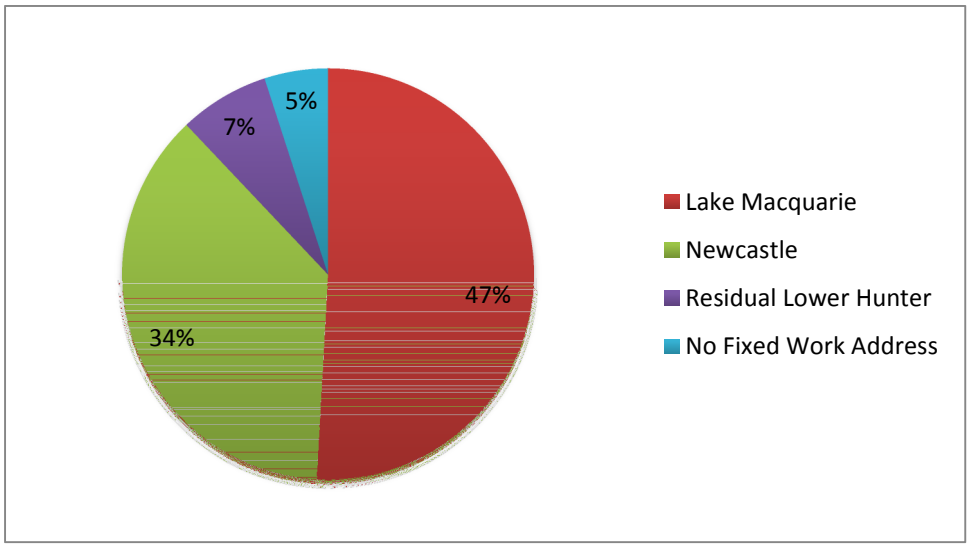

Figure 6 Resident Workers Journey to Work Destinations

The Journey to Work Data for the various travel zones within the Belmont Contributions Catchment have been analysed to ascertain where residents with the Catchment work. There are 8 travel zones that generally conform to the boundaries of the Belmont Catchment. Some minor adjustments were required to ensure consistency of the data.

Of the 13,368 worker residents for the Belmont Catchment, 3,711 or 29% both live, and work in the Catchment. The remaining resident workers travelled outside of the Catchment for work purposes with Newcastle being the largest destination.

The anticipated increase in population in the Belmont Catchment suggests that there will be increased demand for local employment opportunities in the area. The need for local employment is reflected in Council's Lifestyle 2030 Strategic Plan.

3.2 Existing Employment Generating Development

The Australian Bureau of Statistics' 2011 Census and the Belmont Catchment Employment Generating Land Use Survey underpins the existing development component of this section of the report. The following sections provides an overview of the existing employment population and the employment generating development within Belmont Catchment.

3.2.1 Unemployment

According to the 2011 Census, the number of employed people within the LGA was 83,221 with 57,401 persons employed within the LGA. Of the 40,441 residents that worked outside of the LGA, the majority travelled to Newcastle (28,378), with a further 6,644 persons working elsewhere in the Lower Hunter.

With an unemployment rate of 5.3%, Lake Macquarie had the lowest employment rate in the Lower Hunter at the time of the 2011 Census. This was lower than both the State, and National rates of 5.9% and 5.6% respectively.

3.2.2 Belmont Catchment Land Use Survey

A comprehensive Employment Generating Land Use Survey was undertaken by the Integrating Planning Department in 2015. The land use survey identifies the land use of all employment generating land within the Belmont Catchment using modified ANZSIC categories.

The Land Use Survey showed approximately 16.7 hectares of commercial floorspace, and 88 hectares of industrial floorspace in the Catchment.

The following two sections of this report outline the finding of the land use survey for areas zoned for commercial and industrial purposes.

3.2.3 Development in Commercial Zoned Lands

The Employment Generating Land Use Survey identified 13 areas zoned for commercial, private recreation, and tourist purposes within the Belmont Catchment.

Area	Suburb	Zone	GFA
Belmont North	Belmont North	B4	6,211
Belmont 16s	Belmont	RE2	7,392
Belmont North Business Park	Belmont North	B7	10,950
Belmont Town Centre Core	Belmont	B2	39,158
Belmont Town Centre Fringe	Belmont	B4	20,386
Blacksmiths Neighbourhood - Beachside	Blacksmiths	B1	150
Blacksmiths Neighbourhood Centre	Blacksmiths	B1	3,529
Caves Beach Neighbourhood Centre	Caves Beach	B4	1,563
Caves Beachside Hotel	Caves Beach	SP3	2,857

Lake Macquarie Yacht Club	Belmont	RE2	738
Marks Point Neighbourhood Centre	Marks Point	B1	305
Swansea RSL	Swansea	B1	2,559
Swansea Town Centre	Swansea	B2	28,248
		Total GFA	124,046

Table 4 Belmont Catchment – Commercial Floorspace

3.2.4 Development in Industrial Zoned Lands

The 2011 Employment Generating Land Use Survey identified two areas zoned for industrial purposes within the Belmont Catchment.

Area	Suburb	Zone	GFA
Belmont North Bus Depot	Belmont North	IN2	591
Caves Beach Industrial	Caves Beach	IN2	14,052
		Total GFA	14,643

Table 5 Belmont Catchment – Industrial Floorspace

The single largest industrial land use within the two zoned areas was light industry, followed by storage facilities, and places of public worship.

3.2.5 Tourist Development

Lake Macquarie is a diverse coastal destination abundant with natural assets such as the lake, beaches and mountains. The tourism industry within Lake Macquarie has an estimated economic output of $453 million per annum, or 2.4% of the local economy. The industry is comprised primarily of caravan parks, models, short-term holiday rentals, serviced apartments and bed and breakfasts.

In the four years to 2011, the industry received almost 300,000 domestic overnight visitors, 680,000 day trip visitors and almost 10,000 internal visitors; approximately 985,000 visitors in total.

The Belmont Catchment provides a reasonable amount of tourist accommodation with the small and medium scale facilities in the suburbs of Caves Beach, Belmont, Swansea, Nords Wharf, Murrays Beach, and Marks Point.

4 Projected Residential Development

There is scope for significant residential development to occur within the Belmont Catchment. The growth of private and non-private dwellings will consist of the development of Greenfield areas, and the intensification of existing residential and commercial areas. Areas with development potential include those identified within Council's Urban Development Program, and existing areas zoned for urban purposes.

4.1 Urban Development Program

The Integrated Planning Department within LMCC have developed a comprehensive Urban Development Program (UDP) for both greenfield and large scale infill development sites within the LGA. In the Belmont Catchment there are 12 areas identified within the UDP. Of these 12 areas, all have progressed to a sufficient point in the planning stage to warrant their inclusion within the development projections.

The development potential of each of these sites has been assessed in detailed as part of the UDP to ascertain an anticipated development yield. According to the UDP, there is potential for 1,719 additional dwellings to be released from 2015 to 2030 in Greenfield, or large-scale infill sites within the Catchment.

The UDP estimates that all of the 12 sites are likely to be granted approval for subdivision or intensification prior to 2030.

4.2 Additional Infill Development Opportunities

In addition to land identified within the Urban Development Program in Section 4.1 of this report, there is scope for significant residential development to occur within existing urban areas of the catchment. These areas include the centres of Belmont, Caves Beach, and Swansea, as well as existing suburban areas and smaller neighbourhood centres.

Infill growth contributes a significant proportion of the total dwelling and population growth of the Belmont Catchment. The largest areas of infill growth occur in the Belmont town centres and the surrounding area. This area is likely to undergo intensification over the period of the plan. In addition to the infill growth within these above centre and surrounds, it is estimated that steady dwelling growth will also occur across all suburbs within the existing urban footprint.

It is estimated that 3,043 dwellings are likely to be approved and constructed within the Belmont Catchment from 2015 to 2030. This represents an annualised increased in infill dwellings of

The types of residential development anticipated include:

- Attached Dwellings
- Boarding Houses
- Camping Grounds
- Caravan Parks
- Dual Occupancies
- Dwelling Houses
- Exhibition Homes
- Exhibition Villages
- Group Homes
- Hostels
- Manufactured Home Estates
- Multi Dwelling Housing
- Residential Flat Buildings
- Rural Workers' Dwellings

- Secondary Dwellings
- Semi-Detached Dwellings
- Seniors Housing
- Shop Top Housing
- Residential Care Facilities

Please note that the above list of residential uses are not a definitive list of residential development that may have an impact on infrastructure or services for the City.

A number of assumptions with respect to the infill dwelling growth have been included within these projections. These include:

- Varying market acceptance of infill development across the Catchment.
- Varying opportunities for infill development taking into consideration site constraints, and development standards within council's Local Environment Plan and the guidelines for development with the relevant Development Control Plans.
- Underlying demand for dwelling typologies such as seniors housing and residential care facilities.
- Environmental and latent site conditions.
- No allowance has been made for development other than that within existing zoned areas.
- No allowance has been made for amendments to, or variation of development standards or guidelines.

4.3 Projected Dwellings

It is projected that the total number of private and non-private dwellings within the Belmont Catchment will increase from 12,105 in 2015, to 15,148 dwellings in 2030. This represents an increase of 3,043 dwellings, or 25.1%.

	Existing Dwellings (2015)	Projected Dwellings (2015 - 2030)	Total Dwellings (2030)	Percentage Increase	Annualised Growth Rate
Belmont Catchment	12,105	3,043	15,148	25.1%	1.68%

Figure 7 Belmont Catchment – Projected Dwellings 2015 to 2030

Based on the projected growth scenario, development within the Belmont Catchment is estimated to occur at an average rate of 202 dwellings per year from 2015 to 2030. This represents an annual dwelling growth rate of 1.68%.

The anticipated dwelling growth rate of 1.68% is significantly than the rate experienced between 2006 and 2011 of 0.9% per annum. The justification behind this is the number of large scale developments that have either been approved, or are accelerating in their delivery of dwellings.

The growth rate is supported by:

- The amount of residential land that has, or is likely to be released to market within the coming years.
- The relatively low land values and moderate levels of demand increasing the viability of infill developments.

As discussed above, the estimated dwelling growth will vary from suburb to suburb. Whilst all suburbs with areas zoned for urban purposes will experience growth, particular suburbs are estimated to expand significantly.

Suburb	Existing Dwellings 2015	Projected Additional Dwellings 2030	Total Dwellings 2030	% Increase
Belmont	3,236	698	3,934	21.6%
Belmont North	1,082	30	1,112	2.8%
Belmont South	533	7	540	1.3%
Blacksmiths	901	7	908	0.8%
Cams Wharf*	80	18	98	22.5%
Catherine Hill Bay*	120	778	898	648.3%
Caves Beach	1,628	159	1,787	9.8%
Marks Point	897	12	909	1.3%
Murrays Beach*	129	327	456	253.5%
Nords Wharf	400	106	506	26.5%
Pelican	378	12	390	3.2%
Pinny Beach*	0	763	763	-
Swansea	2,426	112	2,538	4.6%
Swansea Heads	295	14	309	4.7%
Total	**12,105**	**3,043**	**15,148**	**25.1%**

Table 6 Belmont Catchment – Projected Dwelling Growth by Suburb

The suburbs estimated to have the largest increase in dwellings are Belmont, Catherine Hill Bay, Pinny Beach, and Murrays Beach.

4.3.1 Dwelling Occupancy Rates

For the purpose of this report and the associated Belmont Development Contributions Plan, it is necessary to estimate the forms of the expected development are likely to take. In addition, the number of persons residing in the various forms is required in order to determine reasonable and equitable contributions.

The below table is an estimate of residential development for the Belmont Contributions Catchment. The persons likely to occupy the various forms for residential dwellings have been estimated based on occupancies rates from the 2011 Census. Adjustments have also been made to account for slightly larger household sizes in the incoming population for dwelling house / lots.

Residential Dwelling Type	Occupancy Rate
Dwelling House / Lots	3.05
1 Bedroom Dwelling	1.20
2 Bedroom Dwelling	1.73
3+ Bedroom Dwelling	2.54
Seniors Living Dwelling	1.37
Caravan Park – Long Term (Site)	1.5
Non Private Dwellings	
Residential Care Facility (Bed)	1
Group Homes / Hostels (Bed)	1
Tourist and Visitor Accommodation (Small)	0.73
Tourist and Visitor Accommodation (Large)	1.55
Camping Grounds (Site)	1

Table 7 Belmont Catchment Residential Occupancy Rates

Residential Dwelling Type	Occupancy Rate [A]	# Dwellings / Rooms / Beds		Growth
		2015	2030	2015-30
Private Dwellings	2.39 [B]	**11,746**	**14,464**	**2,718**
Dwelling Houses / Lots / Exhibition Homes	3.05	9,831	11,583	1,752
Residential Accommodation with 1 bedroom / bedsit	1.2	391	555	164
Residential Accommodation with 2 bedrooms	1.73	621	992	371
Residential Accommodation with 3 or more bedrooms	2.54	404	671	267
Seniors Housing	1.37	289	433	144
Moveable Dwellings (Long–term Site)	1.5	210	230	20
Non-Private Dwellings (Rooms/Beds)	-	**359**	**684**	**325**
Residential Care Facility	Bed	101	181	80
Hostels/ Boarding Houses/ Group Homes/ Hospitals	Bed	76	76	0
Educational Establishments (residential component)	Bed	0	0	0
Moveable Dwellings (Short–term Site)	1	50	70	20
Tourist and Visitor Accommodation (small scale)	0.73	48	128	80
Tourist and Visitor Accommodation (large scale)	1.55	84	229	145

Table 8 Estimated Residential Development by Type

4.4 Estimated Population

By applying the dwelling occupancy rates in Section 4.4.1 to the dwelling projections in Section 4.3, the projected population within both private and non-private dwellings can be calculated. In summary, based on the dwelling projections, the Belmont Catchment is expected to grow by an additional 7,252 persons, or 17.2%. This will increase the population from a base of 31,487 persons in 2015, to 36,899 in 2030.

Suburb	Existing Persons (2011)	Projected Persons (2030)	Total Persons (2030)	Percentage Increase (2011 – 2030)
Belmont Catchment	26,107	7,252	33,359	27.8%

Table 9 Estimated Population Growth 2015 - 2030

Of the 14 suburbs within the Belmont Catchment, Catherine Hill Bay is expected the grow the largest with an additional 2,363 persons by 2030. The other suburb with growth of note is Pinny with 1,882 persons. Table 10 provides an overview of the anticipated growth in person by suburb.

Suburb	Existing Dwellings 2015	Existing Persons 2015	Projected Additional Persons 2030	Total Persons 2030	Population Increase (%)
Belmont	3,236	6,820	1,049	7,868	15.4%
Belmont North	1,082	2,631	63	2,695	2.4%
Belmont South	533	1,210	13	1,223	1.0%
Blacksmiths	901	1,847	13	1,860	0.7%
Cams Wharf*	80	109	32	141	28.9%
Catherine Hill Bay*	120	171	2,363	2,534	1382.0%
Caves Beach	1,628	3,945	292	4,237	7.4%
Marks Point	897	1,759	22	1,781	1.3%
Murrays Beach*	129	361	997	1,359	276.0%
Nords Wharf	400	825	309	1,133	37.4%
Pelican	378	843	22	865	2.6%
Pinny Beach*	0	0	1,882	1,882	NA
Swansea	2,426	4,876	168	5,045	3.4%
Swansea Heads	295	710	28	738	4.0%
Total	**12,105**	**26,107**	**7,252**	**33,359**	**27.8%**

Table 10 Belmont Catchment – Population Growth by Suburb

4.4.1 Age Profile

Table 11 provides a breakdown of the population of the Belmont Catchment in five year age group based on the projected population. By estimating the number of persons within each particular age group, services and infrastructure provision can be targeted to ensure the most appropriate facilities are provided for the population.

The age profile of the Catchment is expected to change significantly from 2015 to 2030 as demonstrated below.

Age Groups	2015		2030		Growth	
	Persons	%	Persons	%	Persons	% Change
0-4 years	1,561	6.0%	1,835	5.5%	274	17%
5-9 years	1,572	6.0%	1,901	5.7%	330	21%
10-14 years	1,705	6.5%	2,068	6.2%	363	21%
15-19 years	1,786	6.8%	2,135	6.4%	349	19%
20-24 years	1,517	5.8%	1,868	5.6%	351	23%
25-29 years	1,384	5.3%	1,735	5.2%	351	25%
30-34 years	1,397	5.4%	1,701	5.1%	305	21%
35-39 years	1,632	6.3%	2,002	6.0%	370	22%
40-44 years	1,713	6.6%	2,168	6.5%	456	26%
45-49 years	1,765	6.8%	2,268	6.8%	504	28%
50-54 years	1,822	7.0%	2,368	7.1%	546	30%
55-59 years	1,731	6.6%	2,268	6.8%	537	31%
60-64 years	1,673	6.4%	2,268	6.8%	595	35%
65-69 years	1,397	5.4%	1,801	5.4%	405	29%
70-74 years	1,102	4.2%	1,501	4.5%	399	36%
75-79 years	916	3.5%	1,268	3.8%	351	38%
80-84 years	754	2.9%	1,067	3.2%	313	41%
85 years and over	679	2.6%	1,134	3.4%	455	67%

Table 11 Belmont Catchment – Population Growth by Age

Whilst all age groups in the Catchment will experience an increase of the period from 2015 to 2030, there will be significant changes to the proportion of the age groups. As indicated in **Error! Reference source not found.**, there will be a significant increase in the proportion of those aged 65 years and over.

5 Projected Employment Generating Development

This section considers the nature and extend of employment generating development within the Belmont Catchment. As discussed in Sections 3.4.1 and 3.4.2 of this report, there are considerable opportunities for employment generating development to occur to 2030.

5.1 Journey To Work Analysis

The Journey to Work Data for the various travel zones within the Belmont Contributions Catchment have been analysed to ascertain where residents with the Catchment work. There are eight travel zones that generally conform to the boundaries of the Belmont Catchment. Some minor adjustments were required to ensure consistency of the data.

Of the 13,368 worker residents for the Belmont Catchment, 3,799 or 28.4% both live, and work in the Catchment. The remaining resident workers travelled outside of the Catchment for work purposes with Newcastle being the largest destination.

The 2011 Census' Journey to Work (JTW) analysis above identified where residents within the Belmont Catchment worked. This section analysis these trips, and the implications for employment generating development growth. The JTW dataset indicates that:

- 7,832 work trips occurred within the Belmont Catchment.
- 3,799 (28.4%) were performed by persons living within the Catchment; and
- 4,033 (51.5%) were performed by persons living within the Lake Macquarie LGA, but outside of the Belmont Catchment.

When compared to the analysis in Section 3.3.2 of this report, the following conclusions can be drawn on the availability of work in particular industries in the Catchment. Other than for the retail trade, jobs in almost all industries within the Catchments were less than the number of residents employed in corresponding industries. Comparison of the data indicates as to the potential for increased employment provision within the catchment, utilising the skillset of both the current, and future employment workforce to meet this demand.

In addition, 4,033 jobs within the catchment were filled by persons that were not residents of the catchment. Therefore, it would appear that there is a considerable opportunity to promote industries within the Catchment in which both the current residents have skills. Furthermore, as the population of the Catchment increases, so will be demand for services which leads to increased employment opportunities. This increases the demand for additional employment generating floorspace.

5.2 Projected Commercial Development

This section identifies the employment generating development that is likely to occur from 2011 to 2030 within the commercially, private recreation and tourist zoned areas of the Catchment.

As noted above, there are currently 11 areas within the Catchment offering a variety or commercial uses. These centres range in size and functions as follows:

Town Centres

- Belmont
- Swansea

Neighbourhood Centre

- Blacksmiths – Beachside
- Blacksmiths
- Caves Beach
- Marks Point

Specialist Areas

- Belmont 16s
- Belmont North Business Park
- Caves Beach Hotel
- Lake Macquarie Yacht Club
- Swansea RSL

Both Belmont and Swansea are identified within the Hunter Regional Plan as centres of local significance. Local centres of significance provide jobs and services such as shopping, dinging, entertainment, health and personal services to meet the daily and weekly needs of the local community.

It is estimated that the primary catchment of the Belmont town centre includes all suburbs between Belmont North and Marks Point. This centre could also attract some expenditure from households in adjacent catchment to the south and north.

The primary catchment of the Swansea town centre is likely to include all areas between Catherine Hill Bay and Nords Wharf to the south, to Pelican and Blacksmiths to the north.

The neighbourhood centres within the Catchment provide for the convenience retail and business needs of their primary trade catchments. Given the location and function of neighbourhood centres within the Catchment, it is estimated that the catchment areas of the neighbourhood centres would generally correspond to the surrounding and occasionally, the adjacent suburb.

The way in which households within the Catchment are likely to distribute retail expenditure will be influenced by the proximity of, and accessibility of the various centres that comprise the retail network both within and beyond the Catchment.

One the basis of the role and function of Belmont and Swansea it is assumed that a large proportion (75%) of supermarket and 20% of specialty retail expenditure from Catchment households is attracted to this centre. However, it should be recognised that expenditure for households in the Belmont Catchment is also likely to be directed to the Glendale and Charlestown Regional Centres and, to the Kotara town centre in the Newcastle LGA.

In addition to the retail floorspace within the commercial centres in the Catchment, demand for additional business and office premise floorspace, and health services is likely to continue.

	2015 GFA (m^2)	Projected GFA	2030 GFA (m^2)
Commercial	125,022	32,348	157,370

Table 12 Belmont Catchment – Projected Commercial Floorspace

5.3 Projected Industrial Development

The 2015 Employment Generating Land Use Survey estimated the industrial floorspace of the Catchment to be 13,667m^2. This floorspace was split over two existing areas zoned for industrial purposes.

Spare capacity (undeveloped, or underdeveloped land) exists in both of the industrially zoned areas.

It is considered highly likely that the majority of this spare capacity will be realised by 2030. This is based on the rate of growth in housing and other forms of development both within the Catchment, and surrounding areas that will facilitate demand for additional industrial and related floor space.

Precinct	Existing GFA (m²)	Additional GFA (m²)	Total GFA (m²)
Industrial Floor Space	13,667	1,591	15,258

Table 13 Belmont Catchment – Projected Industrial Floorspace

5.4 Projected Employees

Below are summaries of the employment likely to be generated by the expected increase in across the Catchment. Additional employment growth in the construction industry or other jobs with no fixed address is not included within this estimate.

It is projected that there is the potential for an additional 1,562 jobs to be created within the Belmont Catchment to 2030.

	Commercial Employees	Industrial Employees	Total Employees
2015	4,788	324	5,112
Growth	1,544	18	1,562
2030	6,332	342	6,674

Table 14 Belmont Catchment Employee Estimates

6 Conclusion and Summary

The development projections within this document have been developed in accordance with the brief, and numerous reports and studies including, but not limited to:

- Lower Hunter Regional Strategy
- Lifestyle 2030
- Belmont Town Centre Area Plan

These above documents, together with council's Urban Development Program and discussion with various council officers, provided valuable background insight into the development potential of the Belmont Catchment.

Table 15 below summaries the typology and number of dwellings anticipated in the Catchment by 2030 base on the growth scenario.

Suburb	Existing Dwellings (2015)	Existing Persons (2015)	Projected Dwellings (2030)	Projected Persons (2030)	Total Dwellings (2030)	Total Persons (2030)
Totals	12,105	26,107	3,043	7,252	15,148	33,359

Table 15 Belmont Catchment - Residential Development Summary

The extend and range of residential development will impact on the performance and supply of employment generating development within the catchment. The retail and office floorspace supply in particular will vary developing on the pace at which residential development proceeds not just within the Catchment, but also in adjacent areas.

Table 16 summaries the employment generating floorspace and number of workers anticipated within the Catchment.

	2015 GFA (m^2)	Projected GFA	2030 GFA (m^2)	2015 Employees	Projected Employees	2030 Employees
Commercial	125,022	32,348	157,370	4,788	1,544	6,332
Industrial	13,667	1,591	15,258	324	18	342
Totals	**138,689**	**33,939**	**172,628**	**5,112**	**1,562**	**6,674**

Table 16 Belmont Catchment - Employment Generating Development Summary

7 References

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Lake Macquarie City Council (2010). Lake Macquarie Section 94 Contributions Plan Citywide No.1 2004 Belmont Catchment

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7.1 Abbreviations

DCP: Development Control Plan

DoPE: Department of Planning and Environment

GFA: Gross Floor Area

LEP: Local Environmental Plan

LGA: Local Government Area

LHRS: Lower Hunter Regional Strategy

LS2030: Lifestyle 2030

LMCC: Lake Macquarie City Council

UDP: Urban Development Program

URA: Urban Release Area

7.2 *Lake Macquarie Local Environmental Plan 2014* Zones

The following is a list of all the zones within *Lake Macquarie Local Environmental Plan 2014* that may be referenced within this report. Please note that some zones may not be utilised within the Belmont Catchment.

Zone	Description
RU2	Rural Landscape
RU3	Forestry
RU4	Primary Production Small Lots
RU6	Transition
R1	General Residential
R2	Low Density Residential
R3	Medium Density Residential
B1	Neighbourhood Centre
B2	Local Centre
B3	Commercial Core
B4	Mixed Use
B7	Business Park
IN1	General Industrial
IN2	Light Industrial
IN4	Working Waterfront
SP1	Special Activities
SP2	Infrastructure
SP3	Tourist
RE1	Public Recreation
RE2	Private Recreation
E1	National Parks and Nature Reserves
E2	Environmental Conservation
E3	Environmental Management
E4	Environmental Living
W1	Natural Waterways


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