



RISE
Residential and Retail
Assessment
Terranora Group Management Pty Ltd
24 March 2009

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Executive Summary

Concept Proposal

The subject site covers a total area of approximately 184 Ha in Bilambil Heights West Tweed. The portion of the site being dealt with in this report, as part of the MP08-0234 Major Project application, is approximately 110Ha and is proposed to have approximately 1,604 residential dwellings. The residential product on site will comprise 181 residential lots, 70 hillside housing homes, 160 resort apartments, 36 penthouses, 367 apartments, 176 villas and townhouses, 16 art shop houses (Soho units), 100 retirement cottages, 486 retirement apartments, 12 retirement villas and a nursing home with 200 beds. It will also include a number of retail and community facilities.

Retail facilities include a town centre (with a village supermarket, convenience retail, commercial suites and a tavern), a hilltop village (consisting of restaurants, retail, arts school and arts studios) and another small retail centre at the northern end of the urban footprint.

Site Assessment

The subject site is part of the wider 880 Ha Bilambil Heights Urban Release Area which has been designated by The Tweed Shire Council and State Government to house between 8,000 to 10,000 people since 1989. It is also part of the urban growth boundary under the Far North Coast Regional Strategy (FNCRS). The establishment of retail centres in this area is in line with the Tweed Retail Strategy, which acknowledges that future centres should be located in expansion areas (such as Bilambil Heights) catering to these populations.

The different types of retail uses proposed for the site (town centre, hilltop village with gallery/art studio and local shops) will each trade to different catchment areas. This is due to the reasonably isolated nature of the subject site, and the varying functions that the developments upon it serve. The proposed retail uses on site trade to relatively tight local catchments, while other more specialized developments (such as the art gallery as part of the hilltop village) will trade to a wider market due to their broad appeal. The topography of the site allows for views over the coast and hinterland enhancing the appeal of residential product on the site and providing it with a point of difference. The proposed layout of the residential product also helps to capture the views on offer and increases the appeal of the site.

Existing Retail Infrastructure

There are few existing retail uses surrounding the subject site. These existing centres trade to the existing local population and are relatively small in scale, serving mainly a convenience function. Currently, residents would need to travel into Tweed Heads or Banora Point to conduct their larger weekly/fortnightly shopping trips and top up shopping trips.

Catchment Area Delineation

The proposed mix of uses for the town centre on the subject site will see it cater to resident's impulse and top up shopping trips. The existing community of Bilambil Heights is located adjacent to the proposed town centre, and the town centre is expected to trade to these residents due to its range and choice of retail, and relatively easy access via Marana Street. Residents located along Scenic Drive are also expected to patronise the subject site. Residents of these areas make up the town centre's Primary Trade Area (PTA).

Future residents of the Bilambil Heights Urban Release Area north and east of the proposed town centre are located down in a valley, and as such, would be required to travel uphill to access the town centre. Residents from this area will make up the Secondary Trade Area (STA).

The gallery/art studio/spa uses as part of the hilltop village development will trade to wider regional area, including tourists and day trip visitors. This is due to its specialised product offerings and appeal.

Resident Characteristics

The demographic profile of the combined town centre trade areas is based on that of the existing Bilambil Heights community, and is likely to comprise young families with above average incomes. At capacity there is projected to be approximately 7,148 people in the identified trade areas. This equates to approximately \$42.9 million in household convenience and food and beverage expenditure in the town centre trade areas, indicating demand for the proposed town centre. The town centre is also expected to receive a portion of inflow expenditure from residents outside of the trade areas in the Bilambil Heights Urban Release Area, due to the variety of uses on site such as child care, commercial office, tavern and other dining.

Population projections from the NSW department of Department of Planning for the Tweed Shire have predicted the population to increase from approximately 86,518 in 2009 to approximately 98,100 in 2016 and 105,190 in 2021. This equates to an increase of approximately 9,151 dwellings between 2009 and 2021 placing pressure on residential land in Tweed Shire. The residential development on the subject site will help to relieve some of this pressure from the increasing population.

The proposed retirement village housing options will also cater to the local community with Tweed Heads having a significantly higher population over the age of 55 (36%) compared to that of the Gold Coast (26%).

Residential Diversity

The Tweed Shire has a number of different residential housing options. These include townhouses, apartments, penthouses, retirement villages, rural housing, single and two storey houses and others. Higher density uses such as apartments are generally located in and around Tweed Heads and the Queensland – New South Wales border. There are also a number of masterplanned communities such as Salt and the Currumbin Eco Village. Whilst the Currumbin Eco Village is located on the Gold Coast it is within close proximity to the subject site and is an example of a successful masterplanned community with a different residential product offer.

The proposed mix of residential uses on the subject site is already present in the local market. As such the residential product will meet the market rather than making the market. This is seen as evolutionary rather than revolutionary in terms of residential product in the Tweed Shire and surrounds as it represents an alternative location for this product rather than a completely new product.

Hilltop Village

The gallery/art/studio/spa uses as part of the hilltop village will cater to tourists and daytrippers who visit the area. This will result in additional flow on effects for the Tweed Shire through the money daytrippers spend while visiting the site. The hilltop village will also benefit the local community, as it will give local artists a place to display their work, and creates an alternate employment offering for local residents.

Residential Assessment

The site is within the Bilambil Heights Urban Release Area and associated urban land under the FNCRS and as such residential uses here are considered to be appropriate. The FNCRS also states that dwelling densities throughout the region should be increased to cope with the expected increase in population and one and two person households. Uses such as apartments, villas and townhouses on the subject site are in line with the FNCRS intent for increased densities.

The proposed mix of residential uses on the subject site does not represent a new type of product for the Tweed but rather existing product in an unfamiliar location in the foothills rather than on the beach or waterfront. This represents an evolution of the Tweed residential market. The 1,604 dwellings and 200 nursing beds on the subject site will also help cater to the demand of a growing population in the area.

The sites amenity through its views and complimentary infrastructure such as retail and community facilities are expected to enhance the appeal of the site and provide it with a point of difference in the market appealing to a wide range of people such as retirees, singles, families and investors.

The proposed residential product proposed for the subject site is expected to be successful in the market.

Retail Economic Impact Assessment

The population at capacity of the identified town centre trade areas of 7,148 people creates demand for proximate local retail facilities. The proposed centres on the subject site such as the town centre, hilltop village and local shops will cater to this demand and trade to local catchments. The hilltop village; with uses such as the spa, arts gallery and studios, will also cater to the tourist market, bringing additional income to both the subject site and the Tweed Shire.

The proposed developments will be beneficial to the community as it will offer proximate places for surrounding resident's convenience, top up, and impulse shopping needs. They will also expand upon the level of choice and offer in the area. The proposed gallery and art studio uses as part of the hilltop village will also benefit the artistic community and the Tweed Shire through the number of tourist visitations to the site.

The proposed uses on the subject site are not expected to impact adversely upon the Tweed Shire retail hierarchy or future retail centres as part of the Bilambil Heights Urban Release Area due to their localised trade areas. As such, the proposed developments are considered to be consistent with the intentions of the Tweed Shire Retail Strategy, as the proposed developments caters to future population growth without adversely affecting existing or proposed centres.

Introduction

INTRODUCTION

This report has been commissioned by Terranora Group Management Pty Ltd.

This report refers to Major Project Application No.MP08-0234 – RISE Concept Plan. The Rise site for MP08-0234 covers an area of approximately 110 Ha. It is proposed to house approximately 1,604 dwellings and a nursing home with 200 beds through a variety of residential uses, such as apartments, houses and retirement living. Other proposed uses on site include tourist facilities, resort, water storage, and a number of activity centres. These centres include a town centre, local shops and a hilltop village/gallery.

Annexure A will deal with the residential product mix proposed for the site. This includes:

- 181 residential lots
- 70 hillside housing dwellings
- 160 hotel apartments
- 36 penthouses - all penthouses are based on a 3 bedroom plan
- 367 apartments - all apartments are based on an average 2 bedroom plan
- 176 villas and townhouses – all villas are based on a 3 bedroom plan
- 16 art shop houses (Soho units)
- 100 retirement cottages
- 486 retirement apartments
- 12 retirement villas
- One nursing home comprising 200 beds

A further breakdown of the product mix is provided in Appendix A2. It is assumed that the development will integrate the latest trends in terms of marketing, design and built form which will enhance its appeal to the target market.

Annexure B focuses on the three activity centres within the area determined by the Department of Planning as being applicable to the Part 3A application. These centres include:

- A town centre consisting of a landmark resort, community centre, civic plaza, shopping centre (village supermarket 1,200 Sq M, convenience retail 600 Sq M, tavern 600 Sq M, retail/business suites 3,700 Sq M), child care, school, and residential
- A hilltop village consisting of a spa (600 Sq M), arts studios, soho units, fine arts school (200 Sq M), and restaurants/retail/studios (1,472 Sq M)
- A small retail presence (375 Sq M) in precinct N

OBJECTIVES

The objectives for this report have been derived by Conics on the basis of experience in similar matters and the issues that arise. Annexure A will demonstrate that the proposed residential mix at RISE will be a marketable product. Annexure B will address the need, impact and community implications for the proposed retail development.

The terms of reference for this report have been derived from the Director General's Environmental Assessment Requirements to provide 'strategic context and justification in terms of market demand including analysis of design with regard to the target market of proposed product.'

Assumptions

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

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

Annexure A

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1.0 Existing Documentation

1.1 INTRODUCTION

The following section provides information on existing documentation in the area in regards to the subject site.

1.2 EXISTING DOCUMENTATION

The subject site is represented within the planning limits of both the Bilambil Heights Urban Release Area and the Far North Coast Regional Strategy 2006-2031 (FNCRS).

The subject site is part of the larger Bilambil Heights Urban Release Area. The Tweed Shire Council has identified the Bilambil Heights Urban Release Area as a future source of land supply for the Shire to cope with the growing population. Due to lack of planning and land ownership issues a structure plan for this area has yet to be completed. The development of the subject site may act as a catalyst for the rest of this area to be developed in the future.

The subject site also falls under the Far North Coast Regional Strategy 2006-2031 (FNCRS). This document is produced by the NSW Government Department of Planning every five years. The current FNCRS projects the expected characterises of the Far North NSW Coast; an area which includes the six local government areas (LGA) of Ballina, Byron, Kyogle, Lismore, Richmond Valley and Tweed, for 2031. The document focuses on the providing 'a healthy, prosperous and sustainable future for the diverse communities of the Far North Coast Region.'¹ The FNCRS also focuses on environmental, settlement character and design, economic development and employment growth, resources and regional transport issues.

The strategy has been formed on the foundation that the region is expected to grow by 60,400 residents by 2031. 35% of the region's growth will be contained in the regional centres of Tweed Heads, Lismore and Ballina, where the strategy encourages higher density living, as well as around town centres and areas of major employment. According to the FNCRS the appropriate mix would be 60% single dwelling to 40% multi unit dwelling developments within Town and Village growth boundaries. It also states that there will be a greater demand for diversity in housing form to match the requirements of changing household structures particularly an increase in one and two person households.

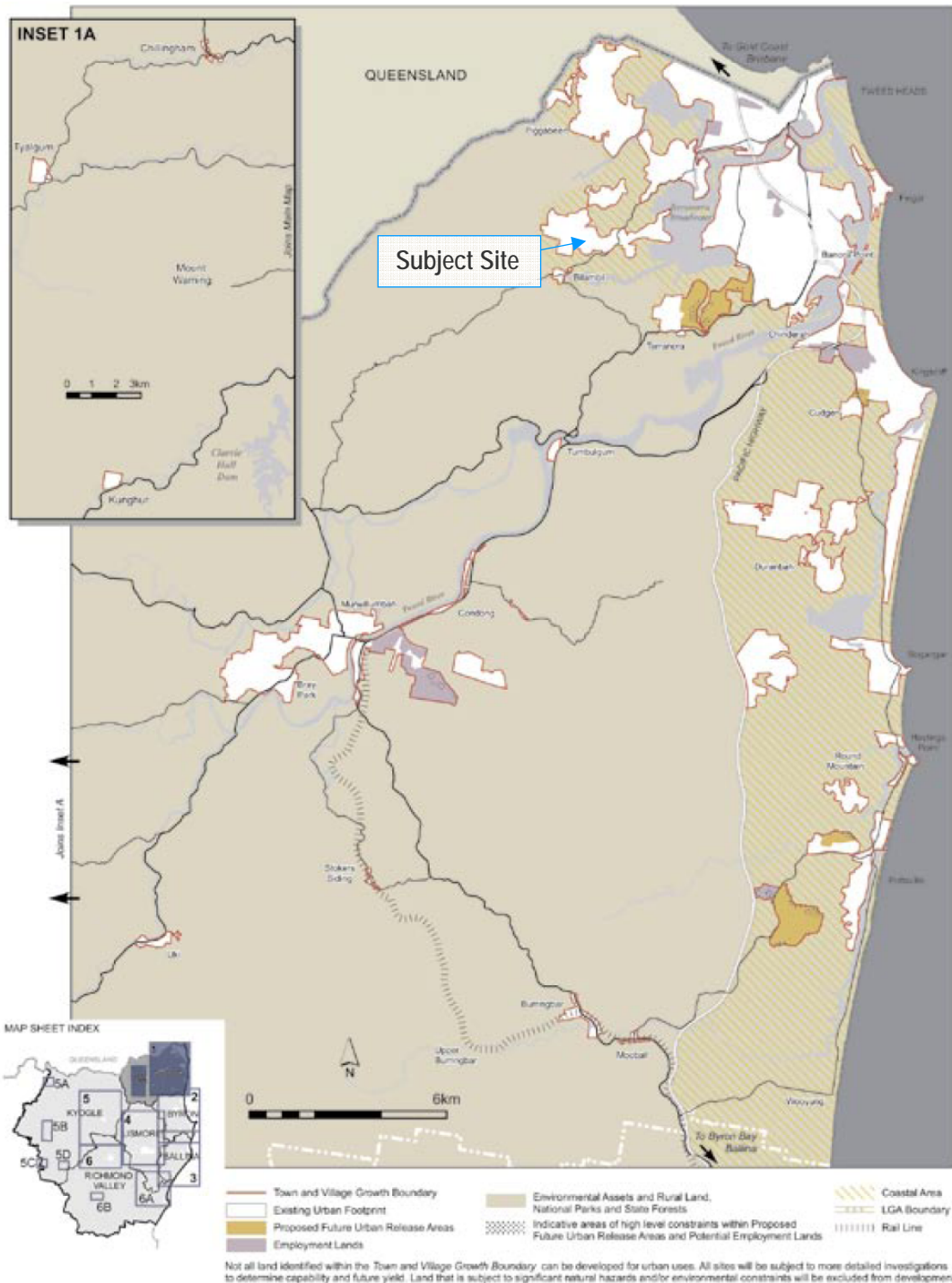
The subject site is located within the 'growth boundaries existing urban footprint' of the strategy. Key drivers of growth in the Far North Coast NSW are those migrating northward from Sydney and other parts of NSW, the population flow from Queensland, and greater accessibility to the region due to upgrade in infrastructure namely the Pacific Highway upgrades.

Figure 1.1 pictures the 'growth boundaries' of the Tweed LGA as identified in the Far North Coast Regional Strategy.

¹ FNCRS 2006-2031

Figure 1.1 Far North Coast Regional Strategy

TOWN AND VILLAGE GROWTH BOUNDARY MAP
SHEET 1 - TWEED



1.3 IMPLICATIONS

The subject site is situated inside the Bilambil Heights Urban Land Release Area. The proposed residential development is also in line with the Far North Coast Regional Strategy (FNCRS) with the southern and middle portion of the subject site in the designated urban footprint. This area has been set aside for urban uses to cater to the future population in this area. The 1,604 dwellings on the subject site will help to cater to this growing population and provide a diversity of residential product in the area.

The FNCRS highlights increased densities in future urban growth areas. Proposed residential uses on site such as apartments, villas and townhouses match the strategies intent for greater diversity of housing and will also cater to the expected increase in one and two person households.

2.0 Concept and Site Assessment

2.1 INTRODUCTION

The following section assesses the subject site from a market prospective to understand the positive and negative aspects of the purchaser perception, and whether the proposed product will match its market area of influence.

2.2 SITE AND SURROUNDS

The subject site is located at Bilambil Heights and includes the Terranora Golf Course and adjacent farm land to the north. It is approximately 110 Ha and is considered developable land, including land either being left undeveloped for open space or environmental purposes. The site is proposed to have a mix of residential, retail and a small amount of commercial uses. At capacity, the total project including the portion outside of the MP08-0234 application can house approximately 3,200 people.

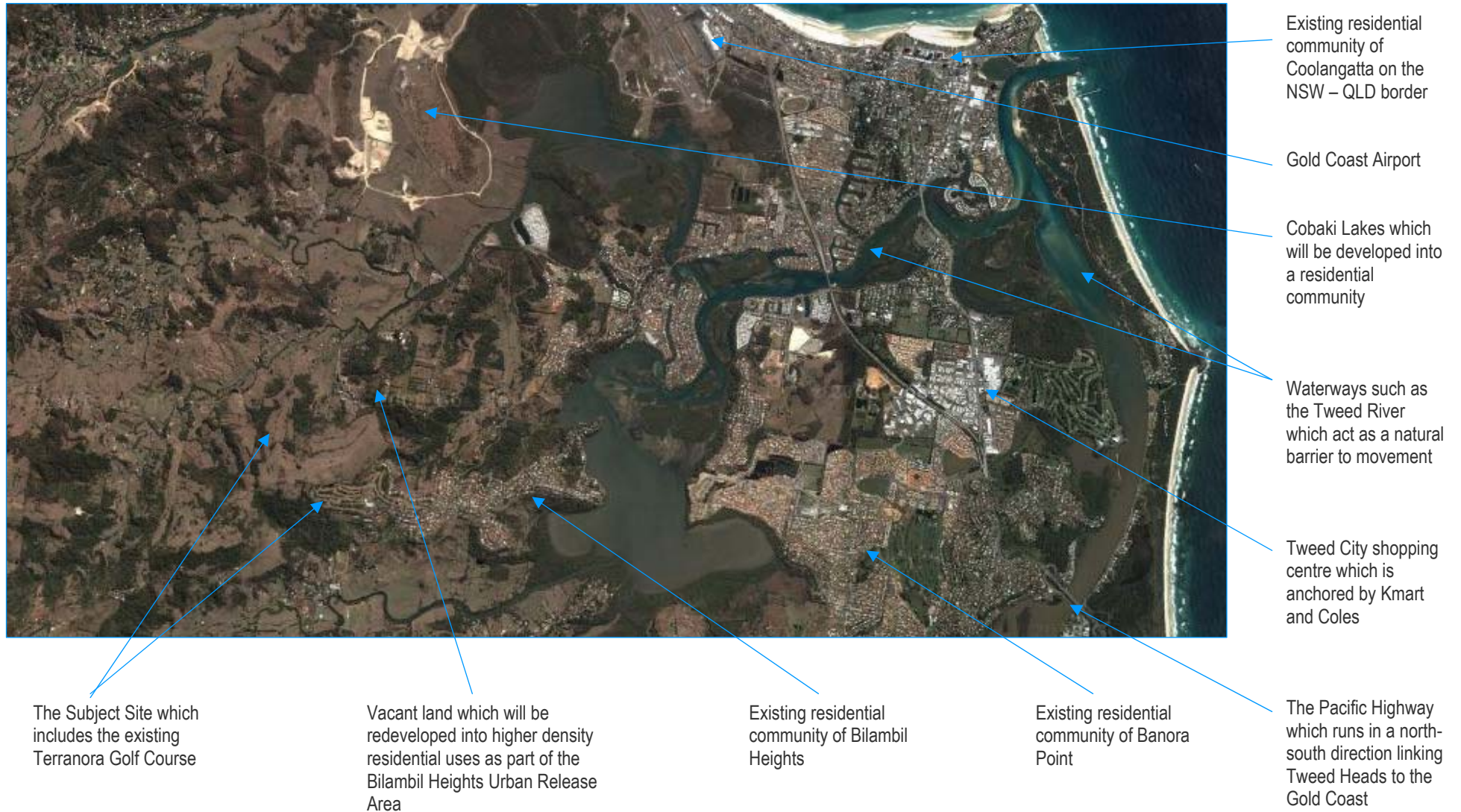
The subject site has large variations in the topography ranging from less than 5m to more than 215m above sea level. This gives the site spectacular 360 degree vistas towards the Pacific Coastline from Byron Bay to Moreton Bay and towards Mt Warning National Park and the Queensland and NSW hinterlands.

Surrounding land uses include the existing residential development at Bilambil Heights, open space, vacant rural land and agricultural uses. An internal road will be developed as part of the project, linking the subject site with the existing Bilambil Heights community to the east of the site and to the future residential development of Cobaki Lakes to the north of the site.

To the north of the site is the future Cobaki Lakes development. This will comprise of residential housing for approximately 10,000 people. Once Cobaki Lakes has been developed it will provide another access point to Bilambil Heights and the subject site from South East Queensland via the Boyd Street overpass and Cobaki Road. Boyd Street runs to the north of the Gold Coast Airport runaway, and over the Tugun Bypass, which directs traffic to the subject site via Tweed Heads and Tugun.

Figure 2.1 provides an aerial overview of the subject site and surrounds.

Figure 2.1 Aerial Overview



2.3 CONCEPT DESCRIPTION

The Terranora Group Management Pty Ltd describes:

'The vision for RISE is that of a contemporary Australian hill town.'



Italian Hilltop Village (Source: Maleny Arts)

The envisioned development will look like that of a modernised Italian hilltop village, where development will be concentrated in higher densities upon the hilltop and along the ridgeline of the site to avoid the natural risk of developing greatly sloped land, and preserve the environmental open space of the subject site. With a large change in the topography across the site providing views of the surrounding landscape and coastline the architectural concept plans have been designed to maximise the use of all natural aspects of the site, giving the development a point of difference to other products on the market.

The development will comprise of a diverse mix of product including medium, low and rural density residential lots, retirement living villages and nursing homes, a local centre, hilltop plaza and village and village centre (mixed use) development, a private school, sports fields, as well as public and environment open space.

The proposed hilltop village plaza will be the focal point of the hilltop village. The plaza will include cafes, restaurants, local shops, apartments and spa, fine arts school, gallery walk and separated outdoor amphitheatre. The plaza, fine arts school and gallery walk will form an arts precinct which will create a day-trip and tourist destination. A similar concept will be used for the hilltop apartments where a plaza between structures will be placed on a podium level under which will be used for car parking. This will create visual appeal and does not take away from the natural surroundings.

The village centre will be a larger centre compared to the hilltop village. The village centre will include a community club, village shopping centre, short term landmark resort accommodation, tavern, commercial office space, child care, hospitality training school and private school, as well as more apartments. Similar concepts of building structures will be used in the centre village as the hilltop village to hide amenities and preserve natural surroundings. Medium density boulevard villas with rear lane access entry will exist as an extension of the village and hill top centre.

Other built product will include hillside housing which protects the natural visual aspect of the site by using screening buffers to hide built forms. A series of retirement living options will also be offered on the subject site such as retirement villages and a nursing home. These developments will target the large proportion of retirees that are located on and relocate to the Tweed Coast. These residents will also serve the onsite catchment of the hilltop and village centres.

The densities of the hilltop village and surrounding areas allow the built form to occupy the tops of hills with the sides left as natural vegetation. This density also allows the built product to capitalise on one of the most appealing aspects of the subject site, its panoramic views. This will help to differentiate the product in the market and act as an additional selling point.

The density of built product will also benefit the proposed retail uses on site by providing a significant population within a walkable distance (approximately 400 m) to these centres. This will help to activate the retail component as well as provide an additional selling point and point of difference in the market through proximity to retail uses further enhancing the appeal and market potential of the product.

2.4 ONSITE POPULATION AND LAND USE

The RISE development will incorporate approximately 1,604 dwellings (and a further 200 nursing beds) which will house an onsite population of approximately 3,200 people. Self containment of the site will be possible as those who wish to live, work and shop on the site will be able to do so, given the amenities offered on site. As mentioned earlier the site will offer a diversity of residential products,

Table 2.1 lists the planned precincts, densities and number of dwellings. A product summary is also provided in Appendix A2.

Precinct	Predominant Use	Approx. Area (Ha)	Dwellings/ Ha	Dwellings
A	Village Centre	6	43	257
B	Retirement Living	6.78	29	195
C	Reservoir	0.3	-	-
D	Low Density Residential/Townhouses	10.23	12	120
E	Low Density Residential/Townhouses/Villas	5.6	13	75
F	Nursing Home	1.22	-	200 beds
G	Retirement Living	5.92	34	199
H	Medium Density Residential	4.12	9	36
I	Private Schools	3.1	-	-
J	Townhouses	2.41	15	36
K	Reservoir	0.3	-	-
L	Hilltop Village	15.19	20	307
M	Retirement Living	6.05	34	204
N	Villas/Apartments	15.54	10	148
O	Hillside Housing	6.13	4	27
TOTAL		184.5		

Source: Terranora Group Management Pty Ltd

Note: Local Parks and Village Squares indicative only and contained within gross areas of relevant precincts

Figure 2.1 illustrates the proposed structure plan for the subject site which is part of the Far North Coast Regional Strategy urban footprint.

Table 2.2 provides a matrix of residential products and likely buyers making up the target market.

Figure 2.1 NSW Dept of Planning Proposed Structure Plan

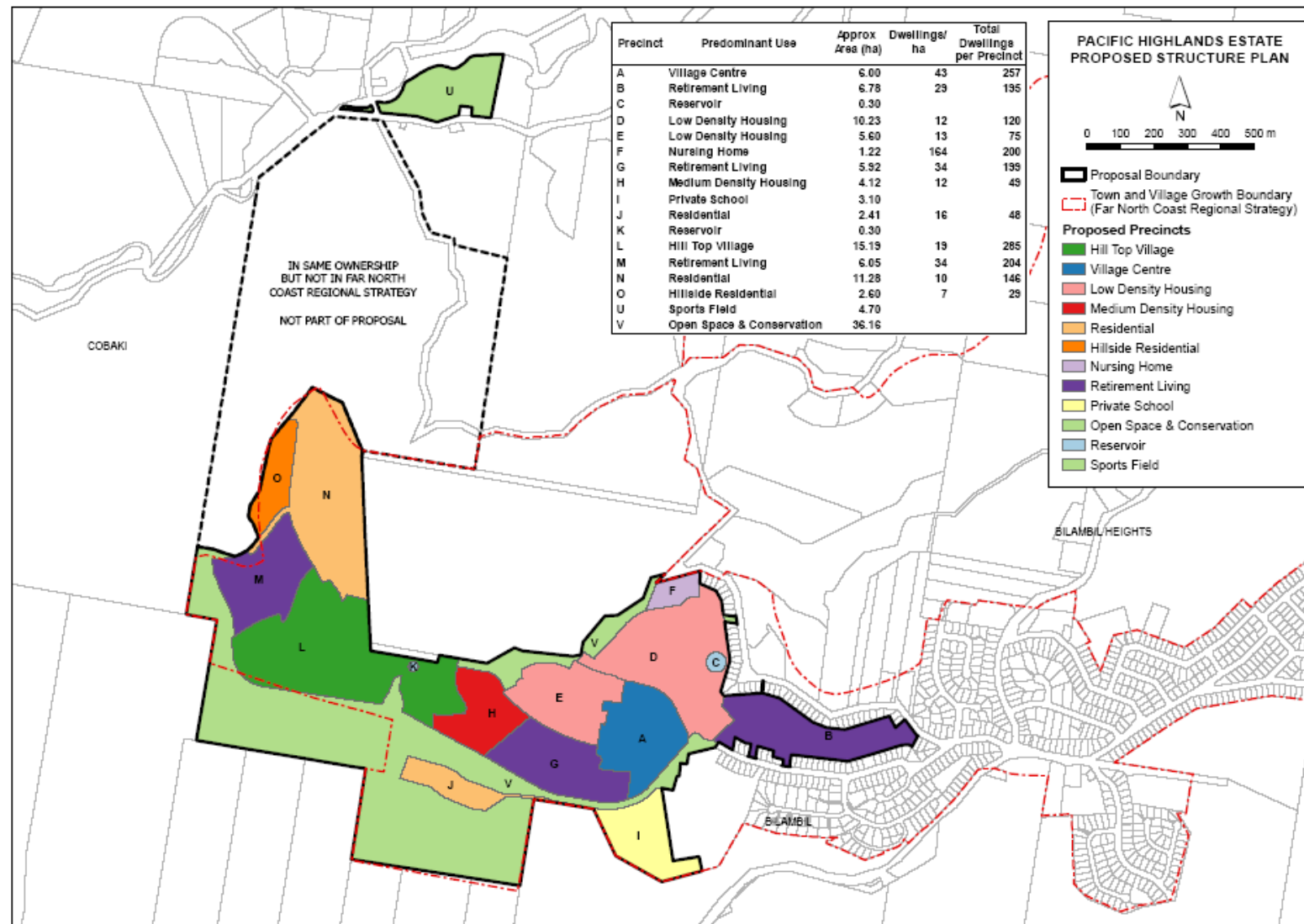


Table 2.2
Prospective Buyers

	Retirees	Double income no kids (DINKS)	Singles	Working Family (includes both single and double income families)	Investors
Residential Lots	Possible, will be dependant upon health and income	Possible, although may prefer smaller product	No	Yes, expected to come from Northern NSW and South East Queensland	Yes
Hillside Housing	Possible, will be dependant upon health and income	Possible, although may prefer smaller product	No	Yes, expected to come from Northern NSW and South East Queensland	Yes
Resort Apartments	Possible, will be dependant upon health and income	Yes, expected to come from Northern NSW and South East Queensland made up of working professionals	Yes, expected to come from Northern NSW and the Gold Coast, and interstate & intrastate.	No	Yes
Penthouses	Possible, will be dependant upon health and income	Yes, expected to come from Northern NSW and South East Queensland made up of working professionals	Possible, although will be dependant on income.	No	Yes
Apartments	Possible, will be dependant upon health and income	Yes, expected to come from Northern NSW and South East Queensland made up of working professionals	Yes, expected to come from Northern NSW and the Gold Coast	Yes, expected to come from Northern NSW and South East Queensland	Yes
Villas and Townhouses	Possible, will be dependant upon health and income	Yes, expected to come from Northern NSW and South East Queensland made up of working professionals	Yes, expected to come from Northern NSW and the Gold Coast	Yes, expected to come from Northern NSW and South East Queensland	Yes
Art Shop Houses	No	Possible with those with an artistic focus. Expect to come from northern NSW and interstate.	Yes, those with an artistic focus. Expect to come from northern NSW	No	Possible, from interstate and intrastate.

Retirement cottages, apartments and villas	Yes, expected to come from the Tweed and Gold Coast areas as well as interstate.	No	No	No	Possible
Nursing Home	Yes, expected to come from the Tweed and Gold Coast areas	No	No	No	No

2.5 IMPLICATIONS

The mix of residential product for the site (such as apartments, traditional residential lots, hillside housing, villas, resort apartments and retirement villages) and the sites location will likely result in potential buyers coming from a diverse background. These include a mix of investors, retirees, working couples, singles and those interested in a living in a location with a high level of amenity.

The topography of the subject site helps to create 360 degree vistas. The planned density of residential product on the site allows the product to take advantage of these views as well as creating shorter distances to proposed retail uses. This will help to provide a point of difference to the residential market and help to enhance the appeal of the site and associated residential product.

3.0 Population Projections and Future Growth Areas

3.1 INTRODUCTION

The following section analyses the population projections for the Tweed Shire Council and the adjacent Gold Coast City Council, and highlights the residential supply and demand implications for the subject site.

3.2 REGIONAL POPULATION PROJECTIONS

Table 3.1 represents the ABS population; showing the variance between the usual resident population in occupied private dwellings (OPD) count and Estimated Resident Population (ERP) values. The ABS count refers to the count on Census night which is inclusive of residents away from home on Census night; excluding tourists. The ABS ERP alternatively, refers to the current population (ERP) which is updated regularly.

Table 3.1 2006 Population		
	Count (OPD)	ERP
Population		
Tweed Shire Council	74,444	79,991
Gold Coast City Council	436,783	469,329
Household Size (Occupied Dwellings)		
Tweed Shire Council	2.39	
Gold Coast City Council	2.52	
Households (Occupied Dwellings)		
Tweed Shire Council	31,121	33,440
Gold Coast City Council	173,247	186,156

Source: 2006 ABS Census, Conics

Count: ABS Population Count on Census Night within private occupied

ERP: ABS Estimated Resident Population (inclusive of residents away from home on Census night / not inclusive of tourists)

Table 3.2 provides population projections for the Tweed Shire Council and Gold Coast City Council areas. The Tweed Shire Council population projections have been based on the New South Wales Government Department of Planning projections for Tweed part A and B. Population projections for the Gold Coast City Council have been based on the Queensland Government Department of Infrastructure and Planning's, Infrastructure and Forecasting Unit (PIFU) medium series.

Table 3.2
Population Projections

	2009	2011	2016	2021	2026	2031
Population						
Tweed Shire Council	86,518	90,870	98,100	105,190	112,180	118,760
Gold Coast City Council	513,018	542,145	615,571	681,447	737,986	788,231
Household Size						
Tweed Shire Council	2.37	2.36	2.34	2.31	2.28	2.25
Gold Coast City Council	2.50	2.49	2.46	2.43	2.40	2.37
Households						
Tweed Shire Council	36,445	38,449	42,013	45,596	49,217	52,736
Gold Coast City Council	205,052	217,650	250,129	280,260	307,199	332,100

Source: 2006 ABS Census, PIFU, Gold Coast City Council, NSW Department of Planning, Conics

The 2009 population of the Tweed Shire Council is approximately 86,518. By 2011 the population is projected to increase by approximately 4.7%, or 4,352 people. By 2016 the population is expected to increase by a further 7,230 residents (7.4%) to 98,100 and then to 105,190 in 2021. The number of households in the Tweed Shire is forecast to increase from 36,445 in 2009 to 45,596 in 2021. This is an increase of 9,151 households over 12 years which equates to approximately 763 households per year.

The Gold Coast City Council has a population of approximately 513,018 people in 2009 with 205,052 households. By 2011 the population is projected to increase by 5.4%, or 29,127 people. In 2016 the population is anticipated to increase by 73,426 to 615,571. The Gold Coast population is expected to reach 788,231 by 2031.

Currently the NSW/Queensland border acts as a barrier to the movement of people, though as land supply begins to deplete on the Gold Coast, Conics expects that the Tweed Shire will serve as a growth corridor for those migrating to the Gold Coast region. It's therefore expected that the Tweed Shire will absorb a proportion of the forecasted Gold Coast growth. Hence the Gold Coast's growth will begin to plateau as growth within the Tweed Shire begins to increase. This can be attributed to the reduction of land supply on the Gold Coast and is discussed in more detail in the following section.

3.3 GOLD COAST LAND STOCK

According to the latest Gold Coast Residential Land and Packaged Housing Market report released by Prodap Services the majority of land stock on the Gold Coast is located in the northern suburbs (Gaven to Yatala). This area includes large developments in Coomera, an area targeted for development within the South East Queensland Regional Plan. It is expected that supply will more than double over the next twelve months as new stock becomes available. The central Gold Coast (Helensvale to Varsity Lakes) has substantially less land stock supply compared to the North Gold Coast. This stock, though, is expected to almost triple over the next 12 months as new releases in Reedy Creek (The Observatory) and Bonogin become available.

There is very little existing land stock supply within the southern Gold Coast, with only nine lots currently available within new residential subdivisions and 37 lots expected for release in the next twelve months all within the Currumbin Valley Eco Village development. The small amount of new supply on the southern Gold Coast gives few options for the migrating to the southern suburbs of the Gold Coast. As the Tweed Shire is located geographically as an extension of the southern Gold Coast, new supply within the Tweed Shire could be seen as extension of the Gold Coast and a southern population growth corridor.

Figure 3.3 displays the number of vacant lots currently available for sale and those expected to be released for sale in the next twelve months as reported by Prodap.

Figure 3.3
Gold Coast Land Stock (Lots)

Gold Coast Location	Currently Available	Expected to Release in Next 12 Months
North	867	2,358
Central	118	337
South	9	37
Total	994	2,732

Source: Prodap (Jan 09), Conics

The Broadhectare Study conducted by PIFU for the Gold Coast City to isolate the available land supply of the next 10+ years (from June 2008) provides similar results to the Prodap report. The Gold Coast City Broadhectare Study identifies 4,874 Ha of land that is suitable and potentially available for residential development. Approximately 66% or 3,213 Ha of the identified land supply is expected to be developed by 2013. Similar to the Prodap report the majority of available land stock has been identified on the Northern Gold Coast with little large lot supply in the southern areas of the Gold Coast. An illustration of the available land on the Gold Coast is provided in Appendix A1.

3.4 IMPLICATIONS

Population growth within the Tweed Shire will create demand for approximately 763 new dwellings a year until 2021. The 1,604 dwellings proposed for the subject site (and 200 nursing beds) will cater to this future population growth and is expected to be developed over a ten year time frame. The proposed dwellings on the subject site represent approximately 21% of the amount needed in Tweed Shire over the next ten years.

Another factor which may affect demand for new residential land and dwellings in the Tweed Shire is the anticipated population growth of the Gold Coast and the dwindling land supply of this area. Should the supply of vacant residential land on the Gold Coast be further constrained (especially on the southern Gold Coast) then this will place further pressure on the need for residential land and product in the Tweed Shire, further increasing demand for uses such as those proposed on the subject site.

4.0 Residential Diversity

4.1 INTRODUCTION

The following section assesses the subject site as part of the diverse residential marketplace that exists in the Tweed Shire to determine whether the proposed RISE development will be accepted by the marketplace.

4.2 RESIDENTIAL DIVERSITY

The Tweed Shire has a vast diversity of residential uses along with the Gold Coast to the north. Residential product in the region includes high density residential building along the coast at Coolangatta and Tweed Heads, a mixture of traditional and waterfront residential throughout the region, medium density product on the coastline at Kingscliff and other places, master planned communities (such as Salt, Casuarina Beach and the Currumbin Valley Eco Village albeit in Qld) and low density and rural residential in the foothills in older established areas.

To paint a picture of the diversity of the Tweed Shire the coastline and the site borders the 'Twin Cities' of Coolangatta and Tweed Heads. This coastal area is predominantly all high density high-rise, multi storey building and unit blocks. This type of development stretches north along the coast to Kirra. Set back off the coastline in the Tweed Heads area is a mix of traditional residential building and waterfront canal estates. These buildings are traditional brick one and two storey homes. South Tweed Heads is the light industrial and retail centre of the region. There are numerous medium density complexes within the area. Club Banora and Golf Course is the centre of development in Banora Point which ranges from medium density development and small lot traditional residential. On the west side of Lake Terranora are the communities of Bilambil Heights and Terranora. Homes in this area are on larger lots with a lower density and have views over the Lake and towards the coast. To the south of the Tweed River is the coastal community of Kingscliff. Kingscliff has a mix of medium density unit blocks along the coastline and traditional residential estates and a large retirement living estate further inland.

The master planned communities of Salt, Seaside City and Casuarina Beach at Kingscliff offer a similar diversity of product to that of the subject site. These developments incorporate medium density residential surrounding a central retail and restaurant precinct with short term accommodation providers. These developments then extend into a traditional residential community with a similar community title scheme style of RISE which governs the architectural character of the homes. These communities have been successful, though it has been that their coastal location which has largely played a factor in their success. Though the subject site is located at a distance from the coast and this type of development has typically not been found in the foothills behind the coastline the sites spectacular views and amenities will create a point of difference to help ensure its success.

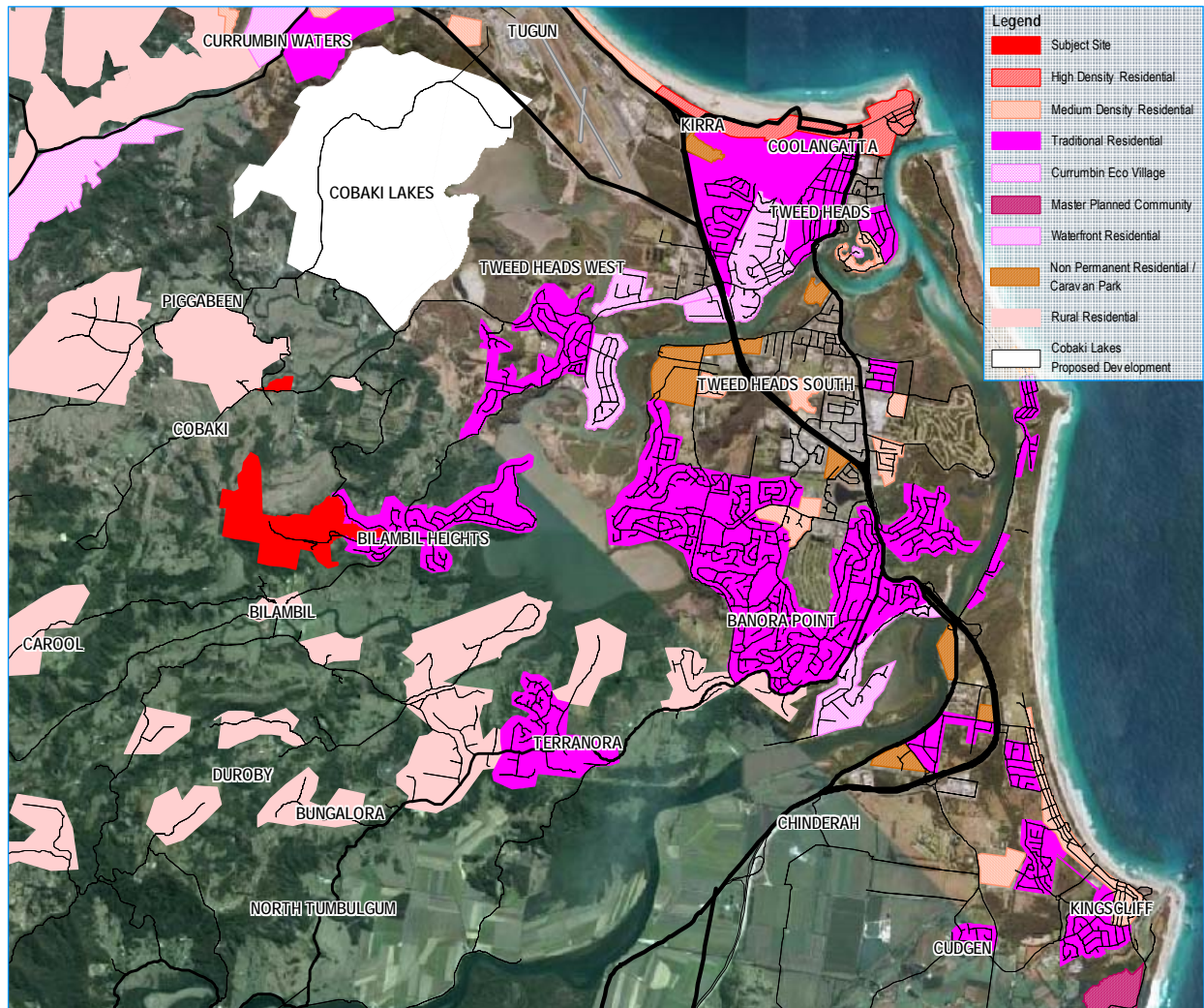
Whilst the Currumbin Eco Village is located on the Gold Coast in the Currumbin Valley it borders the Tweed Shire. Some of its features include food producing street scaping which residents can harvest, 80% of the site has been left as open space with 50% for flora/fauna reserves, a number of environmentally friendly community facilities and many others. This development has achieved numerous prestigious awards for its environmental sustainability and success. This residential product has attracted a niche market for those that want to live in a modern environmentally sustainable community. The Currumbin Eco Village is an excellent example of a successful specialised untested product being successful in the local market.

To the north of the subject site will be the future community of Cobaki Lakes. Cobaki Lakes is expected to have a similar population at capacity to that of the Bilambil Heights Urban Release Area of approximately 8,000 to 10,000 people. Due to the relatively flat topography of the site the predominant residential product is expected to be that of

traditional housing (detached housing on 500 sq M lots) similar to residential uses in Banora Point. Whilst this development is expected to occur at the same time as the subject site the different residential product (Cobaki Lakes with detached housing versus the subject site with hilltop housing, apartments, villas and townhouses most with views) means that they will cater to different parts of the overall market. Due to the need for new of residential housing products to cater to the growing population in Tweed Shire it is expected that there is sufficient demand for both developments, as well as other sites in the Shire that provide a product which is acceptable to its target market.

Figure 4.1 illustrates the different types of residential land/product available throughout the Tweed Shire and the adjoining Gold Coast City Council. These residential areas are indicative only.

Figure 4.1 Residential Diversity



Source: Google Maps 2008 (Note: Map does not depict city planning scheme)

4.3 RETIREMENT LIVING

There is a large proportion of retirees living and moving to the Tweed region. Approximately 36%² of the Tweed Shire's population is 55 years and older. Comparing the Tweed Shire to the Gold Coast which has 26%³ of the population in the same age bracket and is an area which is also considered to have a high proportion of retired residents, it can be seen that there is a high need for retirement living options within the Tweed Shire.

There are currently a number of retirement living options in the Tweed Shire. These include retirement villages, nursing homes, aged care communities and independent living units. The three retirement living options on the subject site (retirement village, retirement living and nursing home) will cater to the ageing population in the Tweed Shire. They also do not represent a new product in the region with a number of retirement options already present in the Shire.

4.4 IMPLICATIONS

The Tweed Shire and nearby Gold Coast contain a diverse mix of residential product from multi storey apartments to traditional single storey dwellings. The proposed mix of residential uses on the subject site will meet the market rather than making the market as these uses are already present in the market. This is seen as evolutionary rather than revolutionary as the proposed mix of uses on the subject site do not represent a new type of product for this market but rather a new location for this product.

Due to the subject sites high level of amenity (such as the views), complimentary uses (such as the town centre, hilltop village/gallery, community facilities etc.) and design the residential product on the subject site is expected to be successful. The recent development of Currumbin Eco Village (which has proved very successful and popular) is an example of a new product to market in a different location being successful.

² ABS Census 2006

³ ABS Census 2006

5.0 Needs Assessment

5.1 INTRODUCTION

The following section addresses the need and viability of the proposed residential developments on the subject site.

5.2 NEEDS ASSESMENT

The subject site is situated inside the Bilambil Heights Urban Release Area and the urban growth boundary of the Far North Coast Regional Strategy. These documents identify future urban land (such as the subject site) to accommodate the growing population in the region. The proposed residential developments on the subject site are in line with these documents strategies as it will provide urban land to accommodate a growing population.

The FNCRS recognises the need for higher density dwellings in the future. The number of apartments and townhouses proposed for the subject site will help meet the demand for these higher density dwellings and growing market for this type of product.

The population of the tweed shire is expected to increase from approximately 86,518 in 2009 to approximately 98,100 in 2016 and 105,910 in 2021. This will result in the need for an additional 9,151 dwellings by 2021 however this figure may increase further based on broadhectare and other studies on vacant land in the Gold Coast which is quickly running out. This will put even more pressure on residential land in the Tweed Shire. The subject site will help to ease some of this pressure by providing an additional approximately 1,604 dwellings and 200 nursing beds. Due to the amount of new dwellings needed in the Shire other developments such as that at Cobaki Lakes are also expected to cater to this demand.

The proposed mix of residential uses on the subject site includes townhouses, hillside housing, apartments and retirement living options. These types of residential product are already present throughout the Tweed Shire and nearby southern Gold Coast region in places such as at Kingscliff, Cabarita, Banora Point, Tweed Heads and Coolangatta (and nearby Currumbin Valley). The proposed mix of uses on the subject site (apartments, villas, nursing home etc.) are located throughout the region and do not represent a new product. As such the mix of uses on the subject site is considered to be an evolution of the local residential market.

The subject sites location and amenity (in particular the views offered of the coast and hinterland) help to enhance the appeal of the product to potential buyers. The target market for residential uses on the subject site covers a large spectrum of buyers due to the different product mix. These include retirees, couples without children, working families, singles, investors and those who wish to live in a community with a high level of amenity. Complimentary uses on site such as the proposed town centre and hilltop village/gallery will also help to enhance the sites appeal to buyers.

The proposed retirement villages on the subject site will cater to the ageing population of the Tweed Shire with approximately 36% of the Tweed Shire population aged 55 years and over. It will also provide a product which appeals to this demographic as it is in proximity to facilities such as retail shops and parks.

Higher density uses in and around the proposed town centre will benefit both the proposed retail and residential uses. Retail uses will benefit in that this will increase the local walkable catchment as people who can walk to local shops are likely to patronise those shops more often than if they had to drive to them. Proximity to local shops also

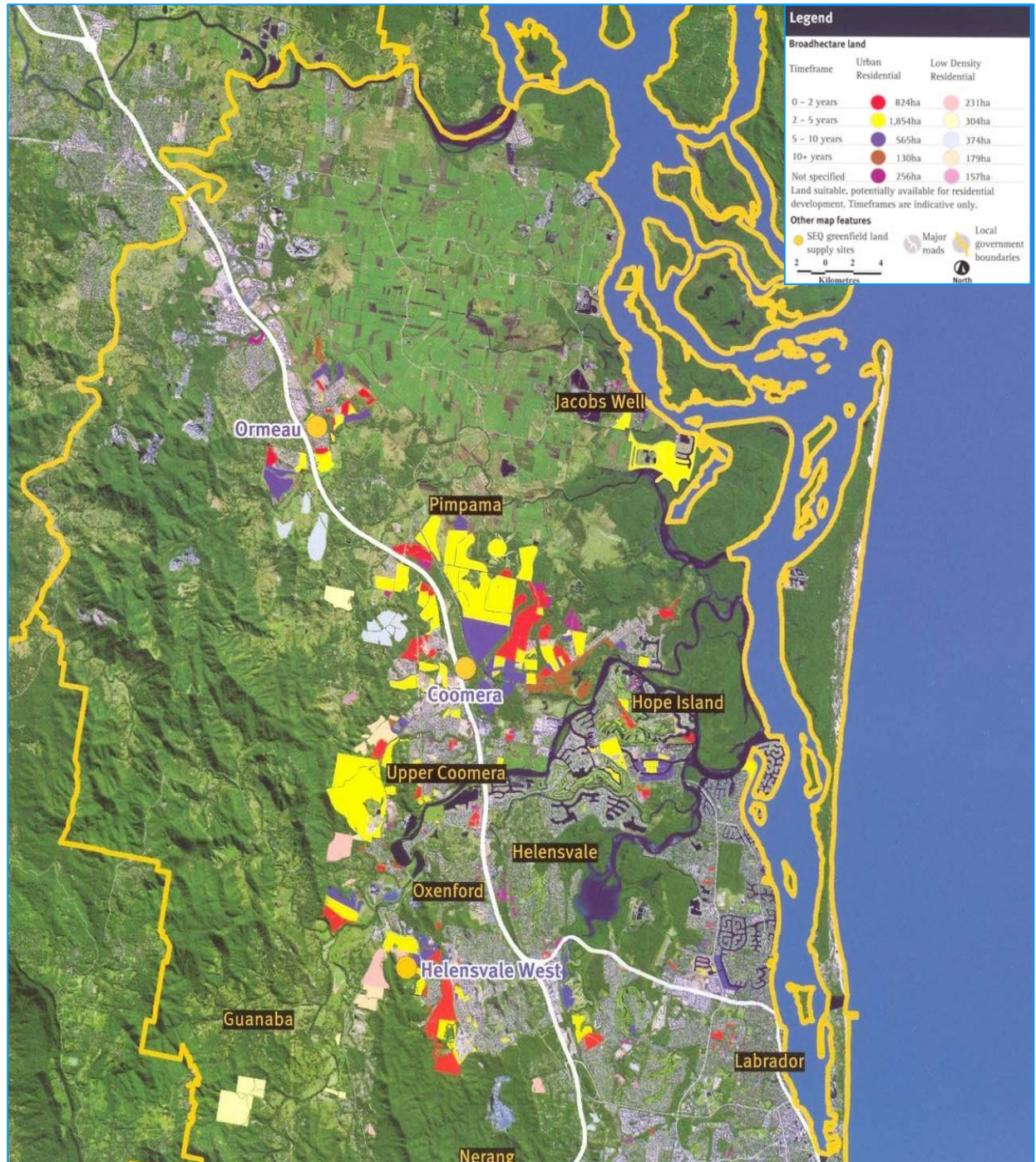
benefits residential uses as this can help to become a selling point as it provides future residents a community in which they can work, live and play.

5.3 CONCLUSION

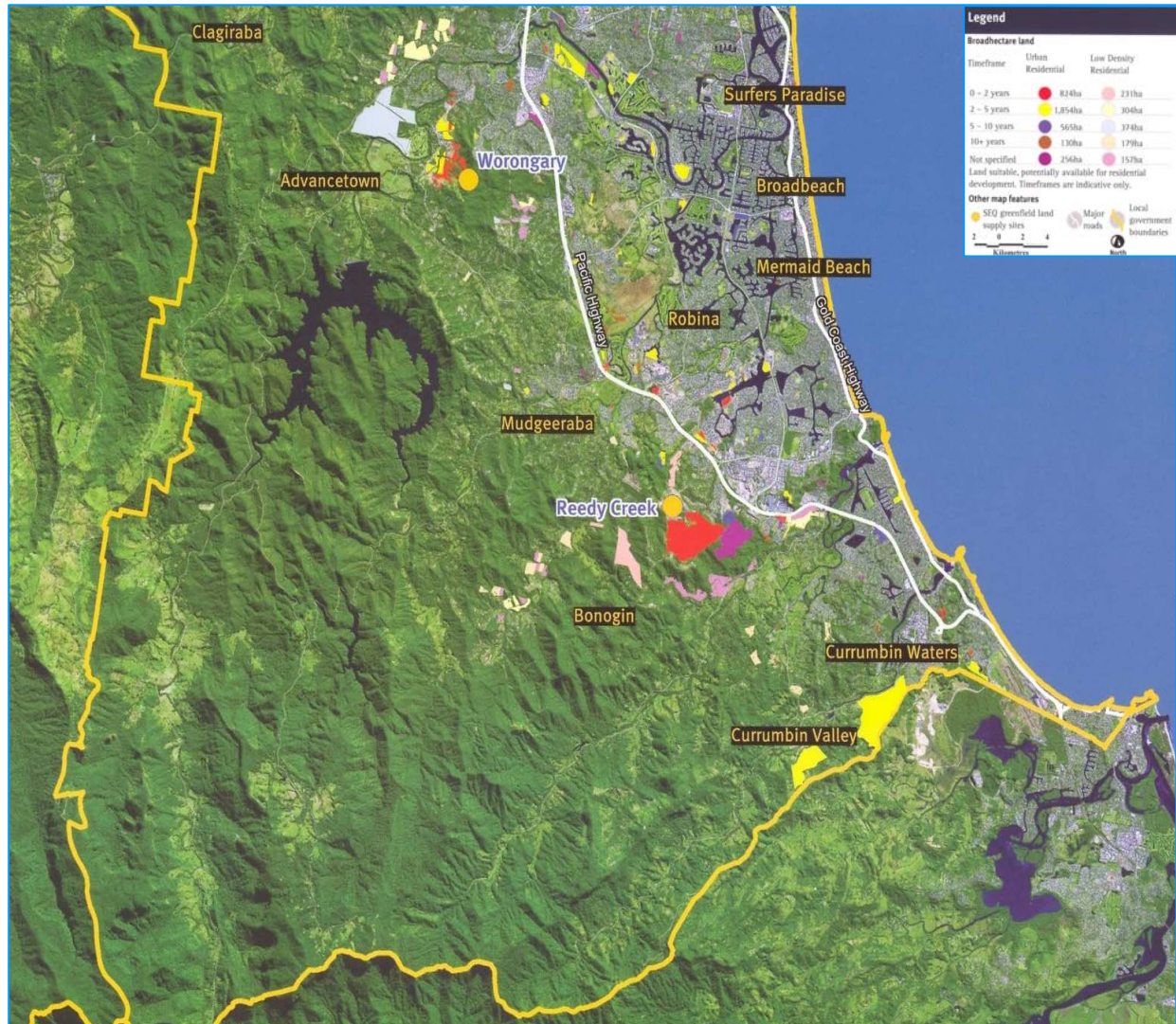
The proposed mix of residential uses on the subject site does not represent a new type of product for the Tweed but rather existing product in an unfamiliar location in the foothills rather than on the beach or waterfront. This represents an evolution of the Tweed residential market. The proposed mix of uses on the site such as apartments and townhouses are also in line with the FNCRS for increased densities in the region. The sites amenity through its views and complimentary infrastructure such as retail and community facilities are expected to enhance the appeal of the site and provide it with a point of difference in the market appealing to a wide range of people such as retirees, singles, families and investors. The 1,604 dwellings and 200 nursing beds on the subject site will also help cater to the demand of a growing population in the area. As such the proposed residential product and mix of product on the subject site is expected to be successful in the market.

Appendix A1

Gold Coast North



Gold Coast South



Appendix A2

TERRANORA GROUP MANAGEMENT P/L.			
RISE PROJECT.			
MARANA ST BILAMBIL HEIGHTS WEST TWEED.			
PRODUCT SUMMARY - 14 for MP08-0234 SECTION ONLY			
Based on the ML Design Concept Master Plan as at 5th March 2009.			
Notes: All apartments are based on average 2 bed room module. All penthouses are based on 3 bedroom module. All villas are based on 3 bedroom module.			
Matches the DoP plan that determines the Part 3A Concept Plan footprint.			
Date: 10th March 09			
Author: S.J.MacRae.			
Precinct.	Product.	Number.	Description / Av GBA / Av GLA / Av GSA.
A-1	Community Hall.	1	500 GBA.
A-2	Village supermarket.	1	1200 GLA.
A-3	Village Shopping Centre.	1	600 GLA.
A-4	Boutique Hotel apartments.	160	Apartments.
A-5	Tavern.	1	600 GLA.
A-6	Hospitality Training School.	1	700 GLA.
A-7	Local Business Suites & Retail.	1	3700 GLA.
A-8	Medium Rise Apartments.	38	4 Storey apartment building.
A-9	Medium Rise Apartments.	23	5 Storey apartment building (retail on GF).
A-10	Medium Rise Apartments.	36	6 Storey apartment building (retail on GF).
A-11	Child Care.	1	400 GLA
A-12	Private community Club building.	1	350 GBA.
A-13	Private community lap pool.	1	25m lap pool.
A-14	Private community Tennis court.	1	Court with pavillion.
B-1	Retirement Living.	15	Cottages.
B-2	Retirement Living.	180	3 Storey apartments.
B-3	Retirement Living Club building.	1	800 GBA.
C	Council Regional Water Reservoir		Land transferred to council.
D-1	Res A Housing Lots.	80	575 GSA
D-2	2 / 3 storey Townhouses.	40	3 bed / 2 car Townhouses.
E-1	Res A Housing Lots.	24	650 GSA
E-2	3 Storey Boulevard Villas.	45	3 bed / media / study / 2 car Townhouses.
E-3	3 Storey Townhouses.	6	3 bed / media / study / 2 car Townhouses.
F	Nursing Home Land.	1	3 storey 200 bed Nursing Home site.
G-1	Retirement Living.	25	Cottages.
G-2	Retirement Living.	162	3 Storey apartments.
G-3	Retirement Living.	12	2 storey villas.
G-4	Retirement Living Club building.	1	800 GBA.

H-1	Res A Housing Lots.	34	650 GSA
H-2	Hillside Housing Lots.	2	650 GSA
I	Private School.	1	Land Area.
J	2 & 3 Storey Townhouses.	36	3 bed / study / 2 car Townhouses.
K	Council Regional Water Reservoir		Land transferred to council.
L-1	Hilltop Plaza Penthouses.	5	Penthouse apartments.
L-2	Hilltop Plaza Sub Penthouses.	31	Sub- Penthouse apartments.
L-3	Hilltop Plaza apartments.	12	Lower level apartments.
L-4	Hilltop Plaza apartment facilities.	1	780 GBA
L-5	Hilltop Plaza retail / restaurants/ studios/ art school.	1	1,472 GLA
L-6	Retail art shop houses (Soho units).	8	South side of Ridge.
L-7	Art studios & shops.	8	As above, Ground floor, with units over.
L-8	Art house apartments.	16	North side, 2 storey apartments over art shops.
L-9	Art Facility / café building.	1	200 GLA
L-10	Hill top apartments (Nth Ridge).	137	Up to 6 storey over basement.
L-11	Hill top apartments (Nth Ridge).	28	2 storey flanking basement.
L-12	Health Spa.	1	600 GLA.
L-13	Hillside Housing Lots.	30	600 GSA
L-14	Res A Housing Lots.	15	575 GSA
L-15	3 storey Boulevard Villas.	17	3 bed / study / 2 car Townhouses.
M-1	Retirement Living.	60	Cottages.
M-2	Retirement Living.	144	3 Storey apartments.
M-3	Retirement Living Club.	1	800
N-1	Res A housing Lots.	28	600 GSA
N-2	Villas.	32	3 bed / 2 - 3 Storey Villas.
N-3	Retail shops.	1	375 GLA
N-4	Hillside Housing Lots.	11	650 GSA
N-5	Midrise Apartments.	70	3 storey apartments over basement.
N-6	Midrise Apartments.	7	2 to 3 storey apartments flanking basement.
N-7	Private community Club building.	1	350 GBA.
N-7	Private community lap pool.	1	25m lap pool.
N-7	Private community Tennis court.	1	Court with pavillion.

O-1	Hillside Housing Lots.	27	650 GSA
U	Sports Fields.	1	Public Sports Field land and amenities.
Product mix summary.			
Residential Lots.		181	
Hillside Housing Lots.		70	
Hotel apartments.		160	
Penthouses.		36	
Apartments.		367	
Villas & Townhouses.		176	
Art shop houses (Soho units).		16	
Retirement cottages.		100	
Retirement apartments.		486	
Retirement villas.		12	
Nursing beds.		200	
School area.		1	
Retail space (Inc tavern) GLA.		4,447	
Commercial space GLA.		5,300	
Health Spa GLA.		600	
Total residential dwellings.		846	
Total Including Hotel units.		1,006	
Total Retirement dwellings.		598	
Total Nursing beds.		200	
		1,804	
Total commercial / retail GLA.		10,347	

Annexure B

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1.0 Site Assessment

1.1 INTRODUCTION

This section assesses from a market perspective the proposed uses on the subject site and the most relevant locational considerations that will influence the development of the site. The planning issues relevant to the subject site will also be addressed in reference to the intended uses onsite.

1.2 SITE ASSESSMENT

The subject site (relevant to the MP08-0234 Major Project application) is located at Bilambil Heights and includes the Terranora Golf Course and adjacent land to the north. It is a 110 Ha site that is assessed to contain approximately 90 Ha of land that is mostly developable, with the remaining land either being left for open space or environmental uses. The site is proposed to have a mix of residential, retail and a small amount of commercial uses. At capacity it can house approximately 3,200 people. The site is proposed to have three activity centres to accommodate retail uses. These centres include:

- A 6,100 Sq M town centre consisting of a 1,200 Sq M village supermarket, 600 Sq M of convenience retail, a 600 Sq M tavern and 3,700 Sq M of retail/business suites. A child care centre, school, residential landmark resort, community centre, and civic plaza are also proposed to be incorporated into the town centres design
- A 2,272 Sq M hilltop village consisting of a spa (600 Sq M), arts studios, soho units, fine arts school (200 Sq M), and restaurants/retail/studios (1,472 Sq M)
- A small retail presence (375 Sq M) in precinct N

Surrounding land uses include the existing residential development at Bilambil Heights, open space, vacant rural land and agricultural uses. An internal road will be developed as part of the project, linking the subject site with the existing Bilambil Heights community to the east of the site and to the future residential development of Cobaki Lakes to the north of the site. The site is part of the broader Bilambil Heights Urban Release Area and the subsequent urban footprint of the Far North Coast Regional Strategy. These documents are discussed in further detail below.

The majority of the subject site is located along the top of a ridgeline which will affect potential travel patterns to and from the proposed centres. For example, to access either Banora Point or Tweed Heads from the subject site requires people to travel along steep and winding roads. As such, on site residents are expected to patronise proximate retail facilities more regularly, due to difficult driving routes to access other (more distant) retail facilities.

To the north of the site is the future Cobaki Lakes development. This will comprise of residential housing for approximately 10,000 people. It is also proposed to contain a town centre on the northern half of the site containing a supermarket, specialty stores, food and beverage uses, and commercial office space. A smaller centre is also proposed for the southern half of the site. Both of these centres are expected to cater to the onsite population of the Cobaki Lakes development.

Figure 1.1 provides an aerial overview of the subject site and surrounds.

Figure 1.1 Aerial Overview



1.3 EXISTING DOCUMENTATION

In August 2006 the Tweed Economic Development Corporation prepared a document outlining the economic impact of the Pacific Highlands Development Project (subject site) on the Tweed Heads economy. This document concluded that the development will create a total of 16,813 Full Time Equivalent (FTE) jobs (both direct and indirect) during the construction phase and 1,351 FTE jobs (both direct and indirect) once completed. The development would also generate \$1.17 million in annual rates (based on 2006 rates) and approximately \$34 million in both direct and indirect household expenditure.

In September 2005 Core Economics (now known as Conics) 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 Lakes and Bilambil Heights. The Tweed Shire Retail Strategy also states that existing retail facilities should be protected with Tweed Heads South remaining as the major district regional centre.

In consideration of the Tweed Retail Strategy in November 2005 (at Council meeting 16 November 2005), the Tweed Shire Council passed a number of resolutions as listed below:

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

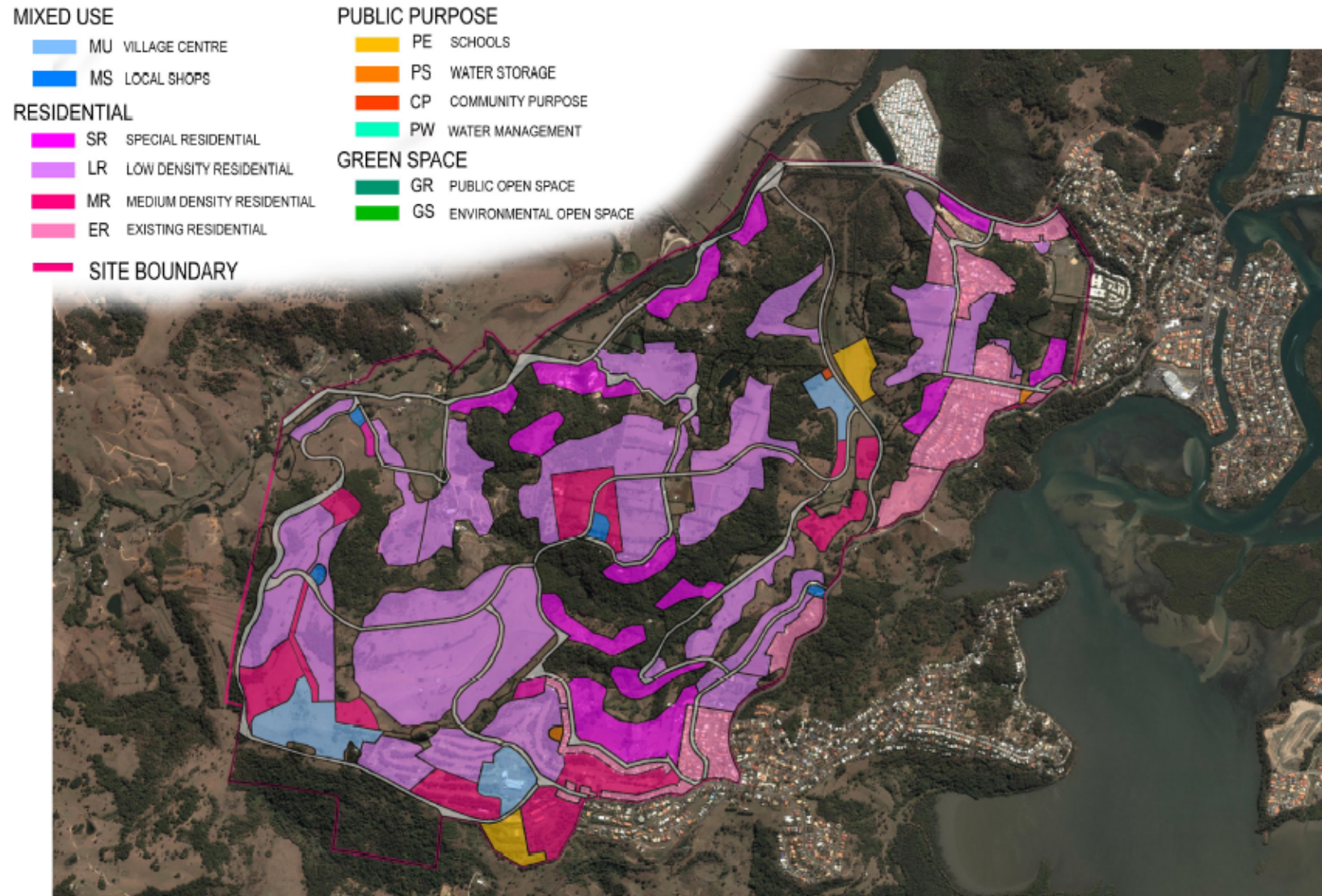
The proposed centres on the southern portion of the subject site sit inside the urban footprint for the Far North Coast Regional Strategy. The Far North Coast Regional Strategy will guide the region's land use and development over the next 25 years to 2031. .

The subject site is also part of the Bilambil Heights Urban Release Area. In 1995 the Tweed Shire Council identified this area as a future urban community however, due to the fragmented ownership and the planning and necessary infrastructure needed to bring this land to market has not occurred.

The applicant has conducted their own planning review research on the Bilambil Heights Urban Release Area in the form of an internal draft Local Area Structure Plan (LASP). It is estimated that at capacity the LASP area will be able to house approximately 8,000 to 10,000 people. This area will need to have a number of centres that cater to local resident's weekly/fortnightly supermarket shopping needs and their impulse and top up shopping needs.

Figure 1.2 illustrates a possible structure plan for the Bilambil Heights Urban Release Area.

Figure 1.2 Bilambil Heights Draft LASP



AERIAL PHOTOGRAPH

JOB NO: 4453-02-A 23/02/2007 A-MP-02-16



BILAMBIL HEIGHTS
TERRANORA GROUP MANAGEMENT PTY LTD

1.4 IMPLICATIONS

The subject site is considered to be somewhat isolated due to the varying terrain of the surrounding areas. Consequently this will result in relatively tight local catchments for the proposed retail uses on site with nearby residents likely to patronise these centres more frequently due to the distance and effort required to reach other similar centres. The different types of retail uses on site (town centre, gallery/art studio, local shops) will trade to different areas due to their location and varying functions. For example, the mix of uses in the town centre (retail, commercial office, accommodation, tavern, child care centre etc.) will result in it trading to the local area on a more frequent basis for a broader range of services and products.

The subject site is part of the wider Bilambil Heights Urban Release Area. This area is expected to have a population of approximately 8,000 to 10,000 people at capacity and include a number of retail centres to serve this future population. This is in line with the Tweed Retail Strategy which acknowledges that future centres should be located in expansion areas catering to these populations.

2.0 Existing Retail Infrastructure

2.1 INTRODUCTION

This section provides a description of existing and proposed retail centres surrounding the subject site.

2.2 EXISTING RETAIL INFRASTRUCTURE

There are a number of existing retail centres surrounding the subject site. These centres are listed in Table 2.1 below.

Table 2.1
Existing Centre Infrastructure

Centre	Location	Size	Tenants
Tweed City Shopping Centre	54 Minjungbal Drive, Tweed Heads South	40,388 Sq M	Tenants include Kmart (7,381 Sq M), Big W (7,033 Sq M), Woolworths (4,527 Sq M), Action supermarket (2,717 Sq M), Coles (2,583 Sq M), Best & Less (1,152 Sq M) and 98 specialty stores.
Banora Point Shopping Village	Leisure Drive, Banora Point	4,419 Sq M	Tenants include Bi-Lo (1,993 Sq M) and 25 specialty stores.
Centro Tweed	Corner of Wharf Street and Bay Street, Tweed Heads	18,727 Sq M	Tenants include Target (5,592 Sq M), Coles (4,054 Sq M) and 87 specialty stores.
Aldi Tweed Heads	9-11 Machinery Drive, Tweed Heads	Approx. 1,300 Sq M	Stand alone Aldi store
Banora Central	Corner of Leisure Drive and Fraser Drive, Banora Point	Approx 5,000 Sq M	Coles, and 4 specialty stores
Bilambil Heights Top Shop	75 Simpson Drive, Bilambil Heights	Approx 350 Sq M	Convenience store (Approx 120 Sq M) and 5 specialty stores.
Panorama Plaza	Scenic Parade, West Tweed	Approx 800 Sq M	Convenience store (Approx 250 Sq M) and 9 specialty stores.
The Palms Shopping Village	Philp Parade, Tweed Heads	Approx 260 Sq M	Convenience Store (Approx 110 Sq M) and 3 specialty stores
Terranora General Store	Terranora Rd Terranora	Approx 100 Sq M	Stand alone convenience store
Terranora Village	Henry Lawson Drive, Terranora	Approx 1,000 Sq M	SPAR (Approx 490 Sq M) and 8 specialty stores

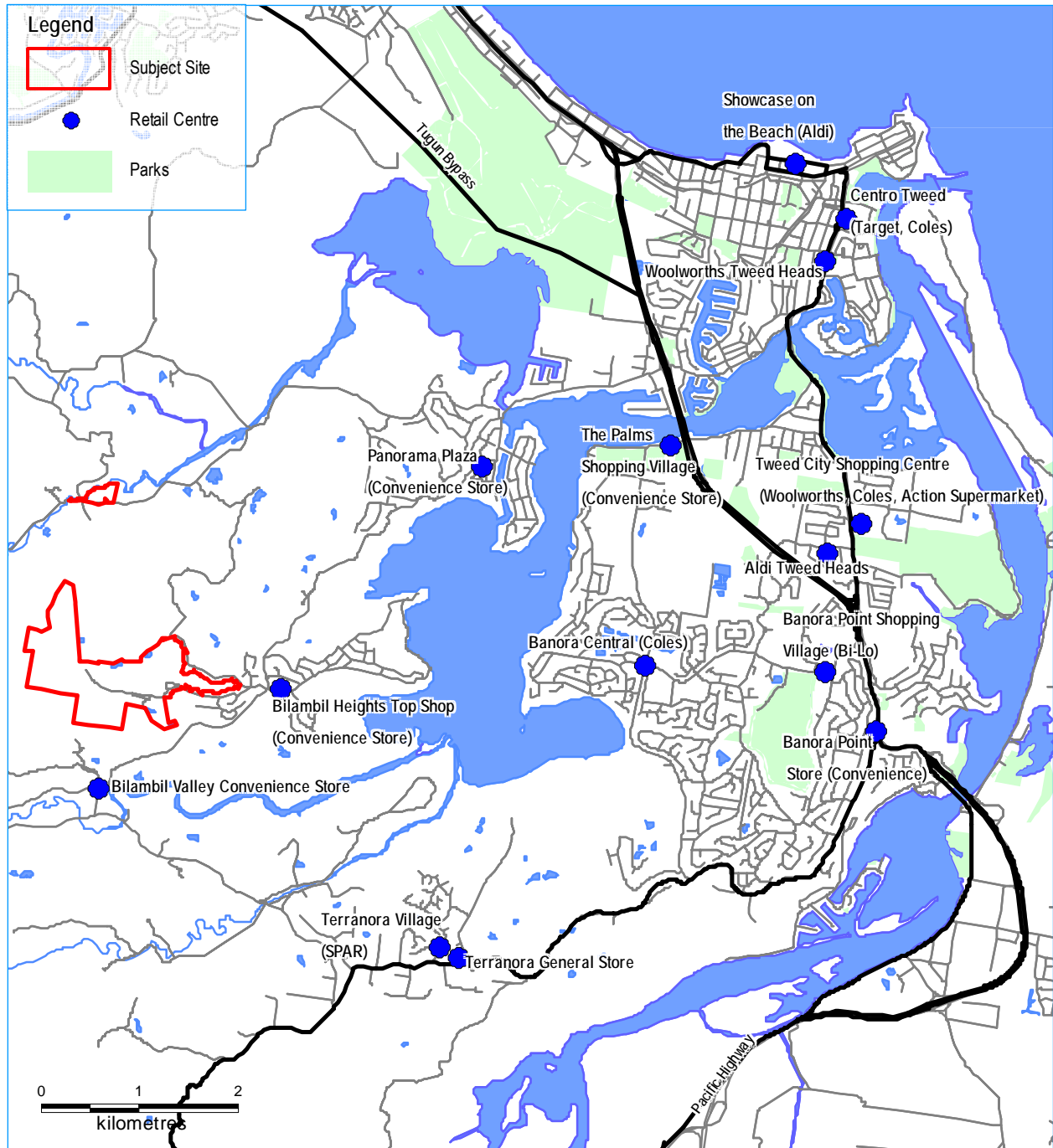
Banora Point Store	19 Pacific Hwy, Banora Point	Approx 350 Sq M	Convenience store (Approx 250 Sq M) and 2 specialties
Bilambil Valley Convenience Store	Bilambil Road, Bilambil	Approx. 150 Sq M	Stand alone convenience store with post office

Source: PCA Shopping Centre Directory 2008, Conics

It should also be noted that The Tweed City Shopping Centre is currently expanding to approximately 47,900 Sq M which will reinforce the centres position in the retail hierarchy.

Figure 2.1 provides an illustration of the existing retail centres.

Figure 2.1 Existing Retail Centres



2.3 IMPLICATIONS

There are a few existing retail uses surrounding the subject site, including Bilambil Heights Top Shop and Bilambil Valley Convenience Store. These centres trade to the existing local population and are relatively small in scale, serving mainly a convenience function. Currently, residents would need to travel into Tweed Heads or Banora Point to conduct their larger weekly/fortnightly shopping trips.

Centres as part of the Bilambil Heights Urban Release Area should be scaled accordingly to meet the needs of the future population. This includes the Rise Town Centre with convenience supermarket and convenience retail. The exception to this will be the arts based hilltop village that will cater to a broader regional tourist and daytripper market.

3.0 Catchment Area Delineation

3.1 INTRODUCTION

This section provides an analysis of the potential catchment areas for the retail uses on the subject site. The catchment areas are indicative only.

3.2 CATCHMENT AREA DELINEATION

Each of the three different retail centres on the subject site (town centre, gallery/hilltop village and local shops) will trade to different catchment areas. The size of each of these catchment areas will be determined by the level of proposed retail in each centre and physical and psychological constraints such as the local road network, existing and future retail centres and the terrain.

The proposed mix of uses for the town centre on the subject site will see it cater to resident's impulse and top up shopping trips. The town centre will be the largest retail centre on the subject site with the most diverse mix of uses (small supermarket, convenience retail, tavern etc.) and as such, is expected to trade to the entire subject site.

The existing community of Bilambil Heights is located adjacent to the proposed town centre. Currently this community is only serviced by a small scale convenience store (Bilambil Heights Top Shop). The Rise town centre is also expected to trade to these residents due to its greater range and choice of retail and relatively easy access via Marana Street. Residents located along Scenic Drive are also expected to patronise the subject site as the drive to the Rise town centre is considered to be easier than that to the potential future village centre, as it will be along relatively flat roadways. Residents of these areas make up the town centre's Primary Trade Area (PTA).

One of the major factors influencing the catchment for the proposed Rise town centre (as well as the other centres on site) is the local topography. The subject site, as well as the areas surrounding it, is located on land of varying topography. This restricts the current and future road network. The varying terrain will also likely affect travel patterns as people generally prefer not to travel uphill to access a centre. Future residents of the Bilambil Heights Urban Release Area north of the proposed town centre are located down in the valley and as such, would be required to travel uphill to access the town centre. As a result of this, residents from this area will make up the Secondary Trade Area (STA).

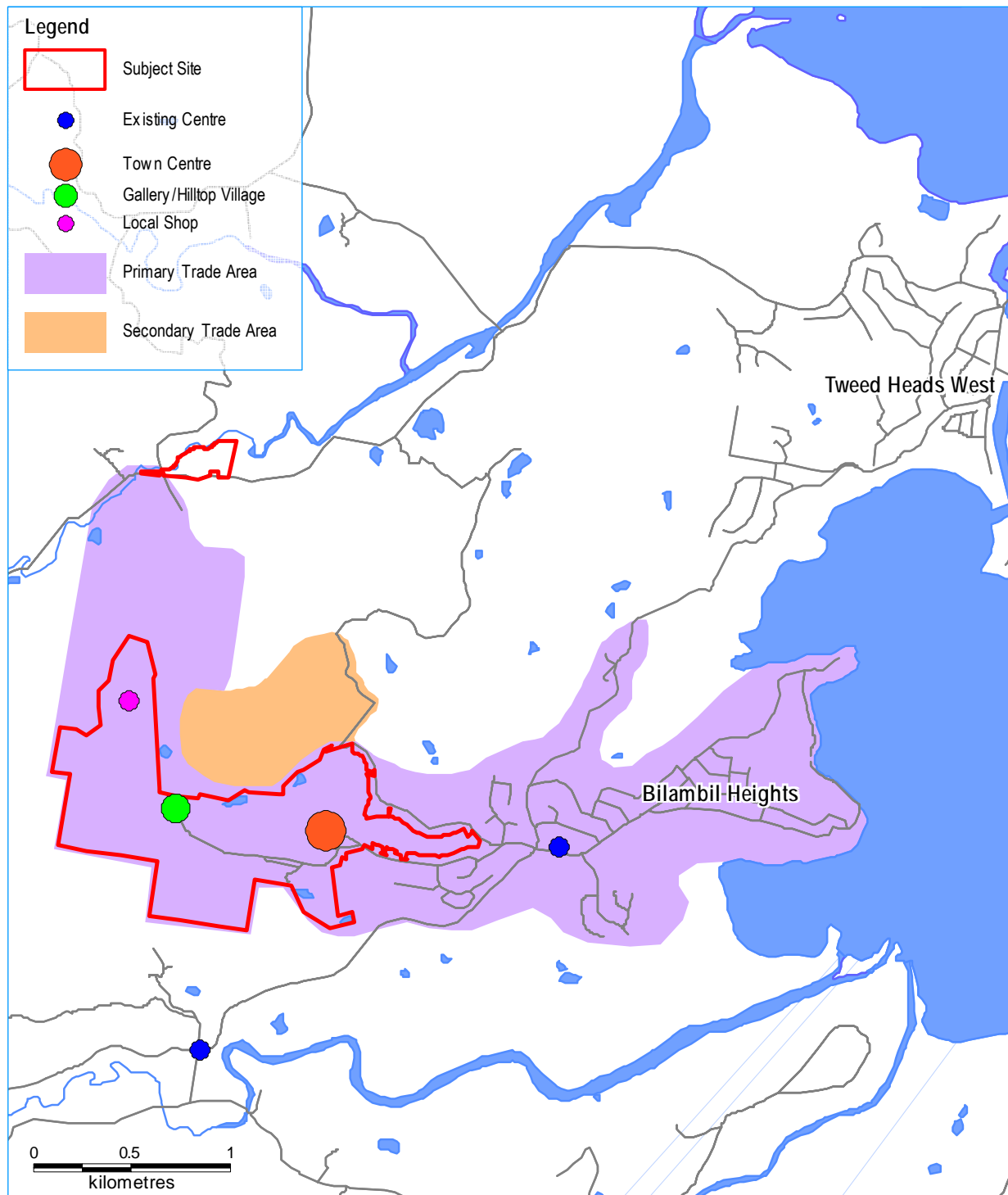
The Rise town centre is also expected to capture a portion of inflow expenditure related from other uses on or near the site such as the commercial office space, resort, child care centre, community centre and nearby school.

The gallery/art studio/spa uses as part of the hilltop village development will trade to wider regional area including tourists and day trip visitors due to its appeal. The convenience retail and food and beverage uses as part of this centre will trade to a small local catchment consisting of surrounding residents. The local shops on site will also trade to a small local catchment.

Residents of the identified Rise town centre trade areas will still need to access a full line supermarket (such as a Coles or Woolworths) anchored centre for their weekly/fortnightly shopping trips.

Figure 3.1 illustrates the catchment for the proposed Rise town centre.

Figure 3.1 Catchment Area Delineation



4.0 Resident Characteristics

4.1 INTRODUCTION

This section provides an analysis of the key demographic features and population projections for the defined trade areas, as well as average annual household convenience and food and beverage expenditure. This will determine the retail potential of the catchment areas.

4.2 POPULATION PROJECTIONS

Table 4.1 represents the ABS population; showing the variance between the usual resident population in occupied private dwellings (OPD) count and Estimated Resident Population (ERP) values. The ABS count refers to the count on Census night which is inclusive of residents away from home on Census night; excluding tourists. The ABS ERP alternatively, refers to the current (ERP). Currently there are no households in the Town Centre STA, and as such, this figure has not been included in Table 4.1.

Table 4.1 2006 Population		
	Count (OPD)	ERP
Population		
Town Centre PTA	2,296	2,656
Household Size (Occupied Dwellings)		
Town Centre PTA	2.66	
Households (Occupied Dwellings)		
Town Centre PTA	864	1,000

Source: 2006 ABS Census
Count: ABS Population Count on Census Night within private occupied dwellings
ERP: ABS Estimated Resident Population (inclusive of residents away from home on Census night / not inclusive of tourists)

Table 4.2 provides a series of population projections and household formations. These projections have been based on the expected population at capacity of the subject site and the Bilambil Heights Urban Release Area.

Table 4.2 Population Projections		
	2008	Capacity
Population		
Town Centre PTA	2,643	6,404
Town Centre STA	0	744
Household Size		
Town Centre PTA	2.64	2.56
Town Centre STA	0.00	2.63
Households		
Town Centre PTA	1,000	2,499
Town Centre STA	0	283

Source: 2006 ABS Census, Conics

The combined trade areas currently have a population of 2,643 people. When the areas reach capacity this will have grown to 7,148. This population increase will be nearly entirely attributed to the development of the subject site (which will have approximately 3,200 people at capacity) and growth in the Bilambil Heights Urban Release Area with the existing community of Bilambil Heights having already reached capacity.

Other uses have also been planned for the site, including a tavern, and a child care centre. There are no taverns in the immediate area surrounding the subject site, and only two childcare centres currently in Bilambil. The tavern would cater to local residents and have a family friendly atmosphere, and be a place for local residents to drink, eat and socialise whilst also enjoying the public plaza planned for the Rise Town Centre. A child care centre will cater to the needs of the growing population of Bilambil. On average, a regular sized tavern has to draw on a population of approximately 7,000 people to be viable, and a childcare centre 1,000 households. Given the population growth that has been projected for the trade areas both of these planned developments will become viable in the years to come.

4.3 DEMOGRAPHIC CHARACTERISTICS

The demographic profile has been derived from 2006 Australian Bureau of Statistics (ABS) Census data. The Town Centre Catchment (PTA and STA) is based on the existing demographic of Bilambil Heights, and is compared against that of the Tweed Shire. A full demographic profile is listed in Appendix B1.

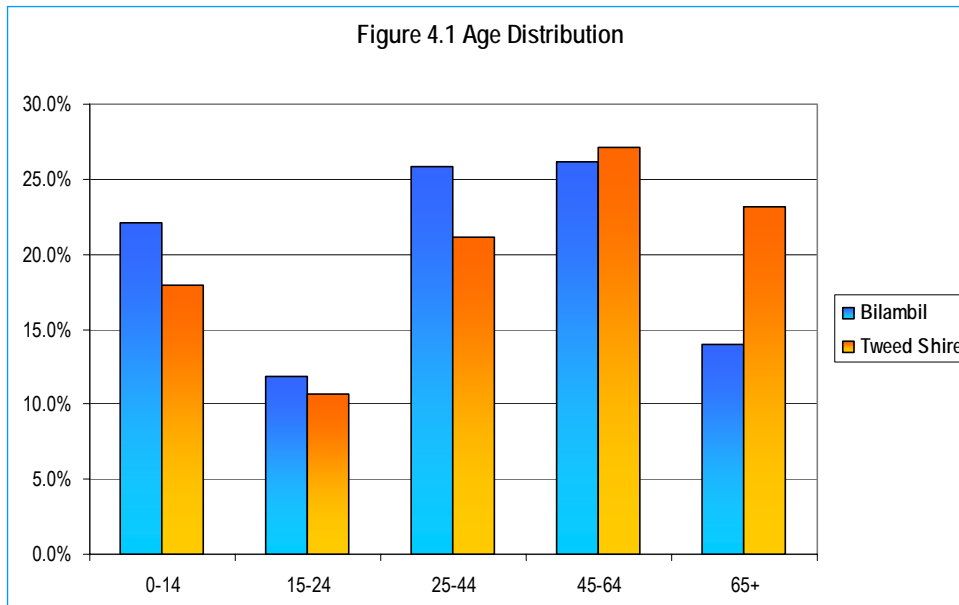
Key demographic features include:

Age Distribution:

The demographic data indicates that the trade areas will have a proportion of residents aged between the ages of 25-44 of 25.8%, and a proportion of residents aged 0-14 of 22.1%. In comparison, the Tweed Shire has just 21.1% aged 25-44 and 17.9% aged 0-14. Only 14% of residents in the Bilambil Heights are over 65, compared to 23.1% in Tweed Shire. This could possibly change in future, though, as there are a number of retirement developments mooted for the area, which would see the trade areas population skewed towards the over 65 demographic.

These figures show that Bilambil Heights is predominately made up of young families. This is further reinforced by the fact that 44.2% of the households in the Town Centre Catchment consist of a couple family with children, compared to 35% in the Tweed Shire.

Figure 4.1 provides an illustration of the differences in age distribution from Bilambil and Tweed Shire



Dwelling Type:

The most common type of dwelling within Bilambil Heights is a separate house, which accounts for 88.3% of residents. In comparison, 65% of Tweed Shire residents live in a separate house. This may change in the future with medium density dwellings proposed for the subject site.

Household Ownership:

83.4% of houses within Bilambil Heights are either fully owned or being purchased directly. This is well above the Tweed Shire average of 69.7%.

Average Household Income:

The average household income for Bilambil Heights in September 2008 dollars is \$61,618. This is well above the Tweed Shire average of \$51,002. A higher household income level will result in an increased demand for retail services such as those proposed on the subject site.

4.4 EXPENDITURE CHARACTERISTICS

Table 4.3 shows the household convenience and food and beverage expenditure potential in the town centre trade areas. The average annual household convenience and food and beverage expenditure has been derived from the 2003/04 ABS Household Expenditure Survey. This table is provided in Appendix B2.

Table 4.3
Household Expenditure

Bilambil Heights		
Average Annual Household Convenience Expenditure	\$12,228	
Average Annual Household Food and Beverage Expenditure	\$3,204	
Forecast Retail Expenditure Potential (\$m)		
	2008	Capacity
Households		
Town Centre PTA	1,000	2,499
Town Centre STA	0	283
Convenience Expenditure (\$m)		
Town Centre PTA	\$12.22	\$30.56
Town Centre STA	\$0.00	\$3.46
Total	\$12.22	\$34.02
Food and Beverage Expenditure (\$m)		
Town Centre PTA	\$3.20	\$8.01
Town Centre STA	\$0.00	\$0.91
Total	\$3.20	\$8.91

Source: Conics & ABS

Note: All figures in September 2008 Dollars

Currently, the combined trade areas spend \$12.22 million on convenience expenditure per year. When these areas reach capacity this increases to \$34.02 million per year. This represents an increase of 178.4%. The proposed Rise town centre on the subject site will help cater to this growth in demand.

In regards to food and beverage expenditure, the combined trade areas currently spend approximately \$3.2 million per year. When capacity is reached, this expenditure will have risen to approximately \$8.91 million per year. There are a number of food and beverage outlets proposed for the Rise site that will cater to this growth in demand.

The Rise town centre on site will also gain a level of inflow expenditure due to patronage derived from other on site uses such as the resort, restaurants, commercial office space, community centre and adjacent school.

In terms of floorspace demand; based on an average turnover per Sq M of \$5,000, the combined trade areas create demand for approximately 8,500 Sq M of convenience and food and beverage floorspace. The Rise town centre is proposed to include a 1,200 Sq M supermarket, 600 Sq M of convenience retail and a 600 Sq M tavern⁴ which equates to approximately 2,100 Sq M of convenience and food and beverage floorspace. This indicates that approximately 25% of all food and beverage and convenience expenditure generated by households in the town centre catchment will be provided by the proposed Rise town centre. This will leave 75% of the available convenience expenditure (or \$32.4M) to be directed towards other possible future centre in the Bilambil Heights Urban Release Area.

⁴ 50% of the trade for the tavern is assumed to be external from the defined trade areas

Other centres on the site such as the local shops will trade to a much smaller catchment than the town centre. These centres will cater to the impulse needs of local residents and possible tourist visitors to the hilltop village centre. The function and market for the hilltop village centre is explained in the next section.

4.5 CENTRE DENSITY

The proposed Rise town centre and hilltop village will not only contain retail uses but be surrounded by a number of residential uses. A number of these residential uses will be in the form of multi storey dwellings or retirement living. The multi storey dwellings in and around the town centre and hilltop village have an important function in terms of the retail uses for these centres.

The greater density of multi storey dwellings compared to low rise or separate dwellings will result in a higher population in and around these centres. As such this increases the population of the walkable catchment. A walkable catchment is generally classified as being approximately 400m as this is considered to be the distance that people are willing to walk for convenience retail. Any distance further than this and people will most likely choose to drive.

A high population in a walkable catchment is important for convenience retail as residents within walking distance to a centre are more likely to patronise the centre than if they had to drive. This leads to a higher centre visitation rate and also creates an active and lively town centre. These centres are also important in terms of selling the residential product as it helps to offer a lifestyle option helping to create a diverse population demographic on the subject site.

The current demographic of Bilambil Heights is that of young families with above average incomes living in separate dwellings. The different types of residential dwelling options (from hilltop villages and retirement living to multi storey dwellings) will help to create a more diverse demographic (eg. empty nesters, retirees, working families) with the retail centres catering to each section of the community.

The proposed Rise town centre (as well as the hilltop village to a certain extent) offers a diverse range of uses such as shopping, dining, a tavern, child care centre, short stay accommodation and commercial office space. These uses help to create a centre which services the needs of local residents whilst also making an appealing place for people to live in so that they can easily access these types of facilities. The multi storey dwellings cater to this demand and in turn also reinforce demand for the proposed centres.

The mix of facilities in the town centre (retail, commercial and residential) will provide the centres network on site and as part of the future Bilambil Height Urban Release Area with facilities for dining, socialising, shopping and impulse retail. This will create a community in which people can live, work and play.

4.6 IMPLICATIONS

The combined town centre trade areas at capacity will have a population of approximately 7,148 people. This includes the existing population of the Bilambil Heights 'ridge' and the future population of the elevated area (including Rise). This population level is considered sufficient enough to create demand for a tavern as well as at least one child care centre.

At capacity there will be approximately \$42.9 million in household convenience and food and beverage expenditure indicating demand for the proposed Rise town centre. Approximately 25% of all food and beverage and convenience expenditure generated by households in the primary and secondary catchments will be provided by the proposed Rise town centre. This will leave 75% of the available convenience and food/beverage expenditure to be directed towards larger centres.

The demographic profile of the town centre trade areas is based on that of the existing Bilambil Heights community, and as such, is likely to comprise young families with above average incomes. However, this may change with retirement living planned for the subject site. Regardless of the final demographic profile of the trade areas they will benefit from the proposed proximate Rise retail facilities and the convenience they will provide.

The higher density residential dwellings in and around the proposed centres (town centre and the hilltop village) will benefit these centres through increased visitation and usage. The proposed centres will also enhance the appeal of these residential uses as it will create an environment where people can live, work and play.

5.0 Hilltop Village Centre

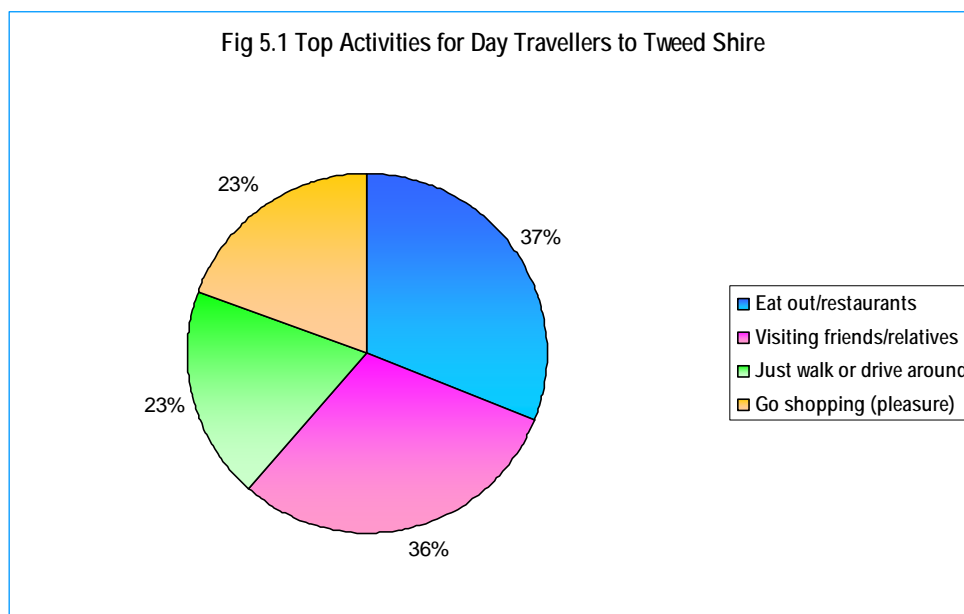
5.1 INTRODUCTION

This section looks at the function of the Hilltop Village centre on the subject site which is proposed to contain a variety of uses such as a spa, arts studios, soho units, fine arts school and restaurants/retail/studios (1,472 Sq M). It will also examine the economic and community benefits that it will create.

5.2 HILLTOP VILLAGE CENTRE FUNCTION

While expenditure at the Rise town centre will be fuelled by local residents (ie: those living within the Town Centre Catchment), the functioning of the Hilltop Village will be driven by the tourist market, which the area is attempting to appeal to. The proposed Hilltop Village will consist of tourist attractions such as a day spa (600 Sq M), arts studios, and restaurants/retail/studios (1,472 Sq M).

Features such as this appeal to the domestic “day tripper” tourist market. According to Tourism Research Australia, an average of 830,000 people from the day tripper market visited the Tweed Shire every year for the three years leading to June 2007. These tourists spent an average of \$79 per person per trip, which equates to approximately \$65.57 million in tourism-related income. 61% of respondents stated that the purpose of these day trips was for holiday/leisure. The top activities undertaken while on these trips is represented in Figure 5.1 below.



Upon completion, the proposed Hilltop Village will be similar in design/function to existing nearby tourist areas such as Mount Tamborine and Lismore, due to its niche product offering and artistic focus. Tourism Research Australia states that Lismore itself received an average of 403,000 day trippers per year for the three years leading to June 2007, each spending an average of \$96 per visit. Top activities included going shopping and eating out/restaurants. It is not unreasonable to believe that as it grows over time the proposed development on the subject site will serve a similar function, and consequentially, reap similar results.

By having a place where local residents and national / international artists can showcase their artwork the area will also fulfil a need within the community, as it provides a focal point for community interests. The northern NSW area has a large artistic focus (as can be seen in places such as Lismore and Byron Bay), and any public gallery is likely to be welcomed by local residents, and further enhance the appeal of the area. It will also help to create an alternate employment offering, and provide a local option for artists who would normally have to travel to other areas to showcase their work.

5.3 IMPLICATIONS

The gallery/art/studio/spa uses as part of the hilltop village will cater to tourists and daytrippers who visit the area. This is a different function from other retail uses on site which cater to local surrounding residents. The hilltop village will also benefit the local community, as it will give local artists a place to display their work. There is a large artistic community in Northern NSW and the proposed development will cater to this community as well as the daytripper market.

The hilltop village will also create an alternate employment offering for local residents and result in additional flow on effects for the Tweed Shire through the number of daytrippers visiting the site.

6.0

Economic Impact Assessment

6.1 INTRODUCTION

This section assesses the economic need and impact for the proposed centres on the subject site. This section will also address the possible impact on future centres surrounding the subject site.

6.2 NEEDS ASSESSMENT

The following questions and answers seek to address the need of the proposed developments on the subject site and their impact on the Tweed Retail Strategy in relation to the November 2005 resolutions.

Will the development adversely impact upon the Tweed Shire Retail Hierarchy?

No.

The proposed retail developments for the subject site (town centre, gallery/hilltop village and local shops) will trade largely to the future population of the subject site, the existing Bilambil Heights community and the future Bilambil Heights Urban Release Area. As such, any impact on existing centres is expected to be minimal, with the centres mainly catering to the future demand of the expanding population.

The onsite Rise town centre lacks the size to become a district retail shopping centre and does not compromise any future or current retail centres. As such Tweed Heads South will maintain its position as the major district regional centre in the Shire.

Will the proposed development lead to any vacancies within the Tweed Shire?

No.

The proposed centres will trade to localised catchments rather than a wider area such as the entire Tweed Shire. As such if any vacancies were to occur they would be on site rather than in other centres in the shire. The burden and risk of this possibly occurring will be shaped by the actions of the owners of the development.

The subject site is expected to provide a number of dining options for local residents such as a tavern, restaurants and takeaway. Whilst some uses may trade to a wide area due to their reputation or characteristics (such as location overlooking Tweed Heads) the site will lack the critical mix and mass to create a dedicated dining precinct. Consequently, the majority of dining on site will trade to a localised catchment having little effect on existing dining precincts in the Shire.

Does the development protect the character of existing towns and villages?

Yes.

The proposed development will cater to both existing and future residents of Bilambil Heights through offering a proximate facility for top up and impulse shopping along with a number of local dining options. Currently, residents of this area have to travel into either Tweed Heads or Banora Point for dining options and a more extensive retail offer. This trip is considered to be significant due to the local topography and road network.

Existing retail in the area is sparse (currently there is only the Bilambil Heights Top Shop) and lacking in choice and offer. The additional retail, dining and artistic/gallery uses on the subject site will help to create a liveable community, enhancing the level of local choice and offer. In turn, this will also help reduce travel times and associated traffic congestion when accessing a local centre. Centres on the subject site will also be within walking distance for a high number of residents reducing reliance on vehicle usage.

Is there an economic need for the proposed development?

Yes.

A population of approximately 7,148 people in the identified town centre trade areas is sufficient enough to support the proposed retail uses as part of the town centre as well as the other retail uses on site such as the local shops. A population of 7,148 in the town centre trade areas will have a convenience household expenditure of approximately \$34.0 million and food and beverage expenditure of approximately \$8.9 million. These expenditure levels create demand for approximately 8,500 Sq M of convenience and food and beverage floorspace, with the town centre expected to cater to approximately 25% of this amount.

The population at capacity of the identified trade areas and the Bilambil Heights Urban Release Area is also considered sufficient enough for the proposed tavern and child care centre uses as part of the town centre. As well as these uses there is expected to be a portion of commercial office space on site. Any commercial office space developed in the town centre is likely to serve a local need and be developed in line with demand thus not impacting upon the Tweed Heads market.

There is a large artistic community focus in Northern New South Wales which requires outlets to display and sell their works. The proposed hilltop village with its gallery and arts studio uses will provide an outlet for these members of the community.

Do the proposed centres cater to the planned residential densities surrounding these centres?

Yes.

The proposed retail uses on site will service the identified trade areas and the local catchment. The density of the surrounding Rise residential uses (such as multi storey apartments) will help to active the proposed retail centres by increasing the population of the walkable catchment. This will result in a higher visitation rate to these centres as people are more likely to visit a centre when it's within walking distance than if they had to drive to it.

The proposed centres will also increase the appeal of surrounding residential uses as they provide future residents with convenience and choice and help to create a lifestyle whereby residents can shop, dine and live in their local community. As such higher density residential uses around the proposed centres are seen as beneficial to both the centres and future residents.

Will the proposed development enhance the community?

Yes.

The proposed development will provide local centres for local people. In the case of the Rise town centre, with its variety of uses such as retail, dining, commercial office, community centre, and child care, it will help to create a community in which people live, work and play. Retail uses as part of the Rise town centre will cater to the top up and impulse shopping habits of catchment area residents. Another benefit to the community will be the number of local jobs created by the proposed development.

The community will also benefit from the hilltop village and the additional tourist visitor uses in this centre (such as the spa, gallery, and studios) will bring to the area. These tourist visitors are expected to inject money into the local economy with flow-on effects going to local businesses throughout the Tweed Shire.

Does the proposed development cater for expected population growth within the area?

Yes.

The population of the town centre trade areas is projected to increase from its current level of 2,643 to approximately 7,148 once capacity is reached. This increase in population of approximately 4,505 people will also result in an increase in demand for retail facilities such as convenience retail and dining. The proposed uses on the subject site such as the Rise town centre and local shops cater to this greater demand from the increased population levels by offering proximate retail facilities for local residents. This will also improve choice and price competitiveness in the area.

6.3 CONCLUSION

The proposed centres on site such as the Rise town centre, hilltop village and local shops will cater to nearby local residents. Uses such as the spa, gallery and studios as part of the hilltop village will also cater to the tourist market which will bring additional income to both the subject site and the Tweed Shire. The proposed uses on the subject site are also not expected to adversely affect the current or future retail hierarchy in the Tweed Shire.

Appendix B1

Demographic Profile	Bilambil Heights		Tweed Shire		NSW	
Total Persons	2,554		70,427		6,549,178	
Age						
0 to 4	181	7.1%	3,636	5.2%	420,431	6.4%
5 to 14	384	15.0%	8,963	12.7%	878,483	13.4%
15 to 19	172	6.7%	4,490	6.4%	439,863	6.7%
20 to 24	131	5.1%	3,063	4.3%	431,854	6.6%
25 to 34	297	11.6%	6,134	8.7%	891,040	13.6%
35 to 44	362	14.2%	8,752	12.4%	957,842	14.6%
45 to 54	419	16.4%	10,051	14.3%	904,337	13.8%
55 to 64	249	9.7%	9,053	12.9%	719,551	11.0%
65 to 74	219	8.6%	7,992	11.3%	465,327	7.1%
75 to 84	120	4.7%	6,391	9.1%	328,795	5.0%
85 years and over	18	0.7%	1,900	2.7%	111,656	1.7%
Marital Status - Persons						
Married	1,067	53.5%	28,747	49.7%	2,628,074	50.1%
Separated	52	2.6%	2,007	3.5%	162,358	3.1%
Divorced	202	10.1%	6,370	11.0%	417,319	7.9%
Widowed	93	4.7%	5,010	8.7%	323,233	6.2%
Never Married	580	29.1%	15,691	27.1%	1,719,273	32.7%
Total	1,994	100.0%	57,825	100.0%	5,250,257	100.0%
Language Spoken at Home						
English Only	2,223	96.3%	64,289	96.6%	4,846,670	78.7%
Other	86	3.7%	2,273	3.4%	1,314,556	21.3%
Total	2,309	100.0%	66,562	100.0%	6,161,226	100.0%
Relationship in Household						
Husband or wife in registered marriage	941	41.6%	26,235	40.2%	2,394,428	39.7%
Partner in de facto marriage	178	7.9%	4,528	6.9%	364,903	6.1%
Lone parent	105	4.6%	3,482	5.3%	275,800	4.6%
Child under 15	464	20.5%	11,702	17.9%	1,215,947	20.2%
Dependent student (15-24)	87	3.8%	2,709	4.1%	303,887	5.0%
Non-dependent child	158	7.0%	3,709	5.7%	414,436	6.9%
Other related individual	34	1.5%	1,110	1.7%	136,365	2.3%
Unrelated individ living in family h/hold	27	1.2%	691	1.1%	50,002	0.8%
Group household member	66	2.9%	1,812	2.8%	180,733	3.0%
Lone person	153	6.8%	7,877	12.1%	571,653	9.5%
Visitor (from within Australia)	47	2.1%	1,446	2.2%	119,515	2.0%
Total	2,260	100.0%	65,301	100.0%	6,027,669	100.0%
Household Structure						
Couple with no children	271	40.2%	8,910	45.9%	618,583	36.0%
Couple famiy with children	298	44.2%	6,800	35.0%	792,686	46.2%
One parent family	102	15.1%	3,480	17.9%	275,798	16.1%
Other family	3	0.4%	222	1.1%	29,152	1.7%
Total	674	100.0%	19,412	100.0%	1,716,219	100.0%
Internet Connection						
None	256	29.8%	11,883	42.8%	817,252	35.1%
Broadband or Dial up	585	68.0%	14,767	53.1%	1,430,876	61.5%
Not Stated	19	2.2%	1,134	4.1%	80,088	3.4%
Total	860	100.0%	27,784	100.0%	2,328,216	100.0%

Demographic Profile	Bilambil Heights		Tweed Shire		NSW	
Dwelling Type						
Separate house	763	88.3%	18,075	65.0%	1,662,621	71.4%
Semi-detached and townhouse	98	11.3%	5,238	18.9%	226,552	9.7%
Flat, unit, apartment	0	0.0%	3,121	11.2%	411,793	17.7%
Other dwelling	3	0.3%	1,331	4.8%	25,703	1.1%
Not stated	0	0.0%	22	0.1%	1,548	0.1%
Total	864	100.0%	27,787	100.0%	2,328,217	100.0%
Persons per Household						
Separate house	2.69		2.68		2.84	
Semi-detached and townhouse	2.44		1.92		2.26	
Flat, unit, apartment	0.00		1.71		1.88	
Other dwelling: Total	0.00		1.58		1.80	
Not stated	0.00		2.50		2.43	
Total	2.66		2.37		2.60	
Dwelling Ownership						
Fully owned	316	36.6%	12,188	43.9%	810,706	34.8%
Being purchased directly	404	46.8%	7,181	25.8%	742,157	31.9%
Rented	126	14.6%	7,161	25.8%	687,430	29.5%
Other Tenure	0	0.0%	244	0.9%	19,259	0.8%
Not Stated	17	2.0%	1,014	3.6%	68,666	2.9%
Total	863	100.0%	27,788	100.0%	2,328,218	100.0%
Monthly Housing Loan Repayments						
Average Repayment - Sept 2006 \$	\$1,433		\$1,407		\$1,730	
Average Repayment - Current \$	\$1,554		\$1,526		\$1,876	
Weekly Rent						
Average Rent - Sept 2006 \$	\$281		\$209		\$233	
Average Rent - Current \$	\$305		\$227		\$252	
Employment						
Employed - Full-time	625	53.0%	14,448	52.1%	1,879,628	60.8%
Employed - Part-time	394	33.4%	9,546	34.4%	842,715	27.2%
Employed - Away From Work	90	7.6%	1,778	6.4%	187,104	6.1%
Employed - Total	1,110	94.1%	25,773	92.9%	2,909,448	94.1%
Unemployed	70	5.9%	1,975	7.1%	183,157	5.9%
Total labour force	1,179	100.0%	27,747	100.0%	3,092,604	100.0%
Not in the labour force	647		26,101		1,801,010	
Occupation						
Upper White	291	26.3%	6,644	25.8%	1,012,736	34.8%
Lower White	383	34.7%	9,317	36.1%	979,819	33.7%
Upper Blue	219	19.8%	4,280	16.6%	396,721	13.6%
Lower Blue	203	18.4%	5,091	19.7%	464,684	16.0%
Other	9	0.8%	446	1.7%	55,480	1.9%
Total	1,105	100.0%	25,778	100.0%	2,909,440	100.0%
Average Number of Cars	1.81		1.49		1.54	
Household Income						
Average Weekly - Sept 2006 \$	\$1,090		\$902		\$1,257	
Average Weekly - Current \$	\$1,182		\$978		\$1,363	
Household Income - Sep 2006 \$	\$56,820		\$47,031		\$65,541	
Household Income - Current \$	\$61,618		\$51,002		\$71,076	

Source: ABS, Conics

Current Dollars - September 2008

Appendix B2

Table Household Expenditure Characteristics			
	Bilambil Heights	Tweed Shire	NSW
Convenience			
Food and non-alcoholic beverages *	\$133.36	\$134.77	\$136.18
Alcohol for consumption off licensed premises	\$17.27	\$17.43	\$17.59
Books, newspapers, magazines and other printed material	\$9.57	\$9.66	\$9.75
Cleaning and Related *	\$10.97	\$11.08	\$11.18
Dry cleaning and related	\$0.74	\$0.76	\$0.78
Hair and personal services	\$7.59	\$7.74	\$7.90
Lottery tickets and lotto	\$4.05	\$4.06	\$4.07
Medicines, pharmaceutical products and therapeutic appliances	\$14.24	\$14.51	\$14.78
Personal care *	\$2.71	\$2.77	\$2.83
Stationery equipment	\$4.53	\$4.59	\$4.65
Tobacco products *	\$15.71	\$15.72	\$15.74
Toiletries and cosmetics	\$12.37	\$12.55	\$12.74
Photographic film and chemicals (including developing)	\$1.43	\$1.43	\$1.44
Weekly Sub Total	\$234.52	\$237.07	\$239.62
Annual Sub Total	\$12,227.94	\$12,360.97	\$12,494.00
<i>Derived Supermarket Expenditure (categories marked* plus 7.5% for general merchandise)</i>			
Weekly Sub Total	\$174.95	\$176.66	\$178.37
Annual Sub Total	\$9,121.89	\$9,210.92	\$9,299.96
Food and Beverage			
Meals in restaurants, hotels, clubs	\$21.65	\$21.90	\$22.14
Fast food and takeaway	\$28.87	\$29.31	\$29.76
Alcohol for consumption on licensed premises	\$10.93	\$11.03	\$11.12
Weekly Sub Total	\$61.45	\$62.24	\$63.02
Annual Sub Total	\$3,204.14	\$3,244.98	\$3,285.83

Source: Conics, ABS

Note: All figures in September 2008 Dollars