Preliminary Economic and Social Assessment

Pitt Street Waterfront Precinct Rezoning

Final Report

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SGS
Economics & Planning

This report has been prepared on behalf of:

For ***Greater Taree City Council***

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Executive Summary

Introduction

In August 2007, SGS Economics and Planning Pty Ltd (SGS) was commissioned by SKM on behalf of Greater Taree City Council to conduct a Preliminary Economic and Social Assessment of the proposed rezoning of the Pitt Street Waterfront Precinct at Chatham, Taree on the NSW mid-north coast.

The Project Brief required SGS to undertake a Preliminary Economic and Social Assessment for the Pitt Street Waterfront Precinct to

> "*determine the level of economic development that the Precinct can support without detracting from the economic sustainability of the Greater Taree area; and to identify the level of community service that can or should be located within the Precinct without detracting from the economic viability of the mixed use rezoning"* (SKM, 15 June 2007, p3).

The Pitt Street Waterfront Precinct

The study site is located within the suburb of Chatham in Greater Taree LGA, approximately 2km north-east of the Taree Town Centre on the northern side of the Manning River. The site is approximately 20ha in area and is currently in the ownership of two different entities.

The site is bounded by Pitt Street to the north and urban / industrial development adjoining Pioneer Street, Chatham Avenue, McRae Avenue and Manning River Drive to the east. Current land use at the site comprises the former Manning River Co-operative Dairy Society (ex Dairy Farmers) factory and agricultural land, together with a small number of commercial, industrial and residential uses. A produce store, Caltex fuel depot and Fisherman's Co-operative are located on the site, in addition to a car dealership on the former "Big Oyster" service station site. The Manning River adjoins the site on its south east boundary.

Figure 1. The Pitt Street Waterfront Precinct Site

Source: GTCC, August 2007

The Pitt Street site is considered to be a 'strategically significant' site by many in the local community given its waterfront location and proximity to the town centre. As discussed in the Project Brief, the site "*represents a very significant opportunity for comprehensive redevelopment and especially to capitalise on the deep-water frontage … along the Manning River*". The current landowners intent with regard to future development is for mixed use redevelopment of the site, including open space, residential, industrial, commercial, and tourism uses, together with the potential for a marina.

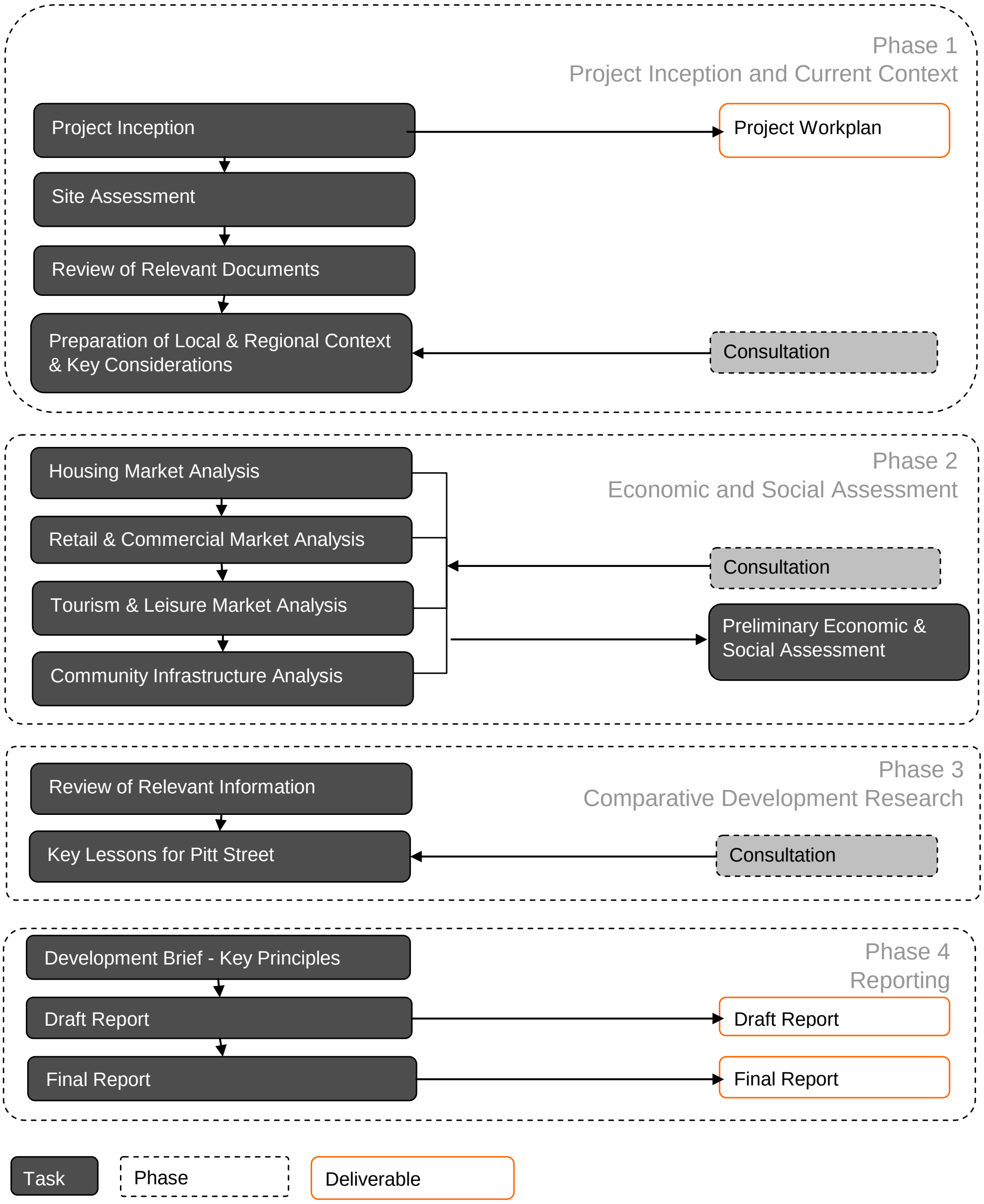
Preliminary options prepared for the site by various urban designers have included features such as restaurants, the possibility of a marina, a re-constructed co-op and markets. This study has 'tested' these, and other ideas for future redevelopment of the Pitt Street site.

Study Methodology

Tasks undertaken to complete the Preliminary Economic and Social Assessment of the proposed rezoning of the Pitt Street Waterfront Precinct are summarised below in Figure 2. It is noted that, as agreed with the client, the methodology used for this study differs to that originally proposed (SGS's proposal, July 2007). A preliminary economic and social assessment was conducted, rather than an impact assessment and prima facie feasibility study as was originally anticipated.

The study was conducted in four stages, and included a housing market analysis, retail and commercial market analysis, tourism and leisure market analysis and community infrastructure analysis. The market analyses were largely based on the existing situation in Taree. To compliment the market analyses, five marina developments that are similar in aim to the 'vision' for the Pitt Street Waterfront redevelopment were documented as comparable 'case studies'. The comparative case studies were used to inform other possibilities at the site. The study concludes with an outline of development principles and opportunities for consideration in the redevelopment of the Pitt Street Site.

Figure 2. Study Method



Development Principles and Opportunities for Consideration in the Redevelopment of the Pitt Street Site

The findings from the four market assessments and 'comparative case studies' were brought together in the final chapter of this study which outlines considerations for the redevelopment of the Pitt Street site. General development principles are outlined with regard to:

- The site overall;
- Marina-related services;
- Residential development;
- Retail and commercial development;
- Tourism and leisure development;
- Community infrastructure.

Overall, the Pitt Street site should provide:

- A unique experience and product.
- A mix of uses, facilities and activities across the site and particularly along the waterfront to ensure its frontage is active.
- Connections to neighbouring areas and the Taree City Centre.
- Retail and commercial development and public open space that maximises the amenity of the site, access to the waterfront and views.
- Activities and facilities that are accessible to and have relevance with the existing local community in addition to facilities that are attractions to visitors in their own right.
- Flexibility in the design of retail and the public realm such that the site is attractive to visitors year round.

The Pitt Street precinct should provide *marina related services* that:

- Includes light marina related industry and retail.
- Provides appropriate car parking arrangements according to whether a boat ramp is located at the site (to be determined through the marina feasibility study undertaken by Maunsell).

The Pitt Street precinct should provide *residential development* that:

- Is located and designed so as to maximise exposure to the amenity of the site. This should maximise water views overlooking the marina and river for example.
- Is designed to maximise privacy.
- Is of high quality design and construction to address potential noise and amenity issues affected by its location on the river-front, close to the marina, retail and the public realm.
- Is priced to cater for the local market. Residential development at the site needs to remain attractive to the local market and affordable relative to coastal development – this is a key attraction of purchasing in Taree.
- Is marketed towards Taree's existing population as well as 'sea changers' / retirees. (Demand for residential is likely to come from the local population as well as 'new movers' to Taree. Preliminary research indicates that the majority of buyers are likely to be owner-occupiers).
- Caters for an ageing population by including smaller properties that require less maintenance and are in close proximity to services.

The Pitt Street precinct should provide *retail and commercial* development that:

- Is a 'unique' offer in Taree.
- Incorporates a 'local flavour' into the retail and commercial offer available at the site.
- Includes a mix of retail that caters for locals to Taree and the site, as well as visitors.
- Is provided in a clearly defined 'heart' of the development.
- Includes leisure and tourism-related retail (for example, canoe kayak, bicycle or boat hire, a shop-front for local tourism providers - tours and charter boats, and potentially the relocation of the Taree visitor information centre).
- Incorporates marine-related retail.

The Pitt Street precinct should provide *tourism and leisure* development that:

- Incorporates the design of a 'gateway' for visitors entering the town centre from Old Pacific Highway / Airport.
- Creates access and vantage points to view events on the Manning River and to cater for visitors to Taree for these events.
- Links the Pitt Street site to other recreation and entertainment facilities in Taree - the Taree entertainment centre for example.
- Incorporates a hotel with flexible conference facilities to cater for business and tourist visitors to Taree as well as the local market.
- Links with surrounding areas via transport on the Manning River (eg, Coocumbac Island Nature Reserve).
- Has good public pedestrian and cycle connections throughout the site and with other areas of the LGA, including the Taree City Centre.

In relation to *community infrastructure*, the Pitt Street site should provide development that:

- Is an inviting environment for local people, a space that creates a clear sense of place and pride for local people.
- Is designed to address crime and safety, displays a strong sense of ownership (private or public), and incorporates measures to ensure pedestrian safety
- Captures local heritage through built form by adaptive reuse of existing heritage items identified at the site and design that this respectful of the character of the surrounding area.
- Provides quality open space and public facilities that are attractive to locals and visitors, children, families, young and old people.
- Includes links between the surrounding residential area and the Taree City Centre through appropriate and reliable public transport services (eg, a shuttle service), walking and cycling.
- Provides community-based retail / commercial development.
- Provides good access to onsite and offsite services and facilities for both future precinct residents' access to offsite services and facilities and local Taree residents' access to onsite services and facilities.
- Includes public open space and facilities that are designed and managed to ensure that the area is an attractive and safe place for visitors and locals.

The following specific opportunities were identified in relation to residential, retail and commercial development, community facilities as well as the staging of the development.

The site should provide *residential development* that:

- Primarily caters for the local market.
- Is predominantly medium density residential development, including villas, townhouses and apartments in a tiered development up to 3 storeys[1].
- Is 2-3 bedroom dwellings with storage facilities and car parking.
- Is priced to suit the local market and reflect Taree's position relative to the coast (consultation indicated that prices should range from $450,000-$650,000).
- Is staggered or uses landscaping and physical separation to ensure privacy.
- Is of high quality design and construction, eg double-glazing.

The site should provide *retail development* that:

- Includes boutique retail, a high end tavern, restaurant or café as well as a small supplies store.
- Incorporates leisure and tourism-related retail including for example canoe, kayak, bicycle or boat hire.
- Includes a shop-front for local tourism providers and potentially the relocation of the Taree visitor information centre to the site.
- Involves the reuse of the dairy factory buildings and relocation of fisherman's co-op at the site to incorporate a 'local flavour'.
- Provides a flexible space to host the organic fresh food markets.
- Includes marina-related retail including a chandlery and boat broker.
- Is located in a clearly defined 'heart' around the marina and linked to the old dairy factory site.

The site should provide *commercial development* that:

- Includes a high quality, 4-4.5 star hotel with flexible conference facilities.
- Includes boutique office space to cater for home-based businesses.
- Is located in a clearly defined area with exposure to Manning River drive, but is well linked to retail development at the site.

The site should provide *tourism and leisure development* that:

- Includes a gateway site that is attractive to visitors entering Taree on Manning River Drive.
- Includes a museum, Indigenous art and general art space.
- Is clustered at the 'heart' of the development on the waterfront.

The site should provide *community facilities* that:

- Include high quality facilities including BBQs, public parks.
- Include flexible open space to create access and vantage points to view events on the Manning River, eg, a sloping grassed area on the river bank.
- Are well managed.

[1] It is noted that SGS's housing demand projections identify the likely future demand for between 351 and 402 additional medium-density dwellings within the Greater Taree LGA. The proposed development is likely to be able to cater for the majority of this demand.

The overall design of the site should:

- Use lighting and landscaping to create opportunities for natural surveillance.
- Include cycle, pedestrian and boat links across the site and to surrounding precincts.

The *staging of development* at the site should include:

- Establishment of a key anchor tenant at the site early in the development process.
- Construction of the marina first.
- Incorporation of public open space and activities areas into the early stages of the development.
- Marking and sale of some residential dwellings off the plan to provide an opportunity to raise capital as well as to 'test' the market.

It is noted that this study includes a broad analysis to inform the masterplan for the proposed redevelopment of the site. A financial feasibility study has not been completed as part of this study. A financial feasibility study should be conducted once the master plan for the site is complete.

1 Introduction

1.1 Background and Scope of the Study

In August 2007, SGS Economics and Planning Pty Ltd (SGS) was commissioned by SKM on behalf of Greater Taree City Council to conduct a Preliminary Economic and Social Assessment of the proposed rezoning of the Pitt Street Waterfront Precinct at Chatham, Taree on the NSW mid-north coast.

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More specifically, the requirements for the Preliminary Economic Assessment were to:

- *"Review and assess development opportunities and constraints within the Precinct based on existing reports and data related to the site and appropriate comparative developments;*
- *Assess the economic implications of future development of the Precinct with respect to the LGA and broader region including employment creation potential and potential positive and negative impacts on other businesses; and*
- *Provide recommendations on the type and extent of economic development that the Precinct could support sustainably"* (SKM, 15 June 2007, p3).

The Preliminary Social Assessment was required to:

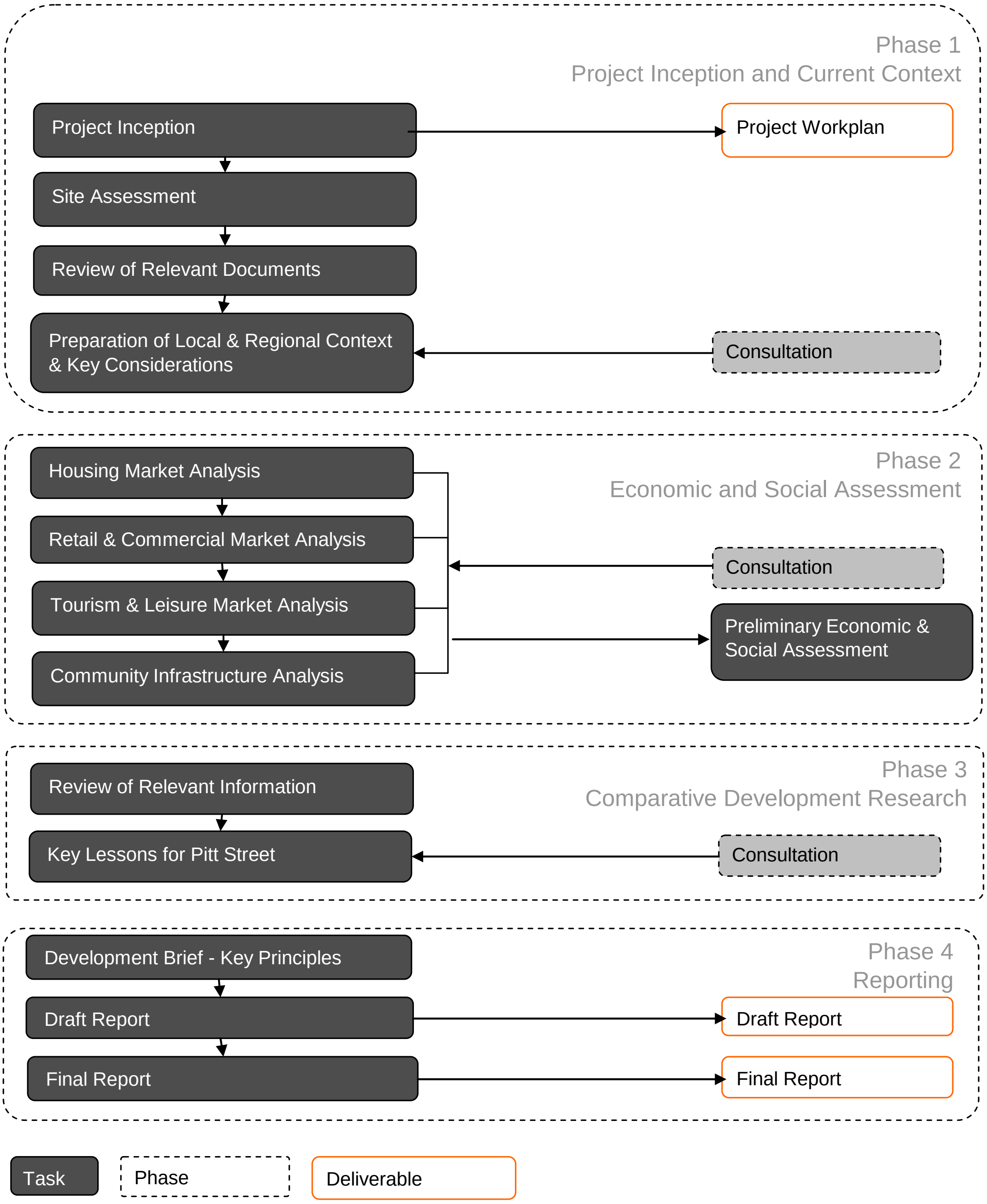
- *"Determine the capacity of existing and planned community services;*
- *Quantify potential future demand;*
- *Establish the capacity of existing services to meet potential future demands;*
- *Provide recommendations on the need for provision of additional services, facilities and resources to cater for future development of the Precinct."* (SKM, 15 June 2007, p3).

This report includes the various market assessments which provide the basis for recommendations that inform concept design and master planning for Pitt Street.

1.2 Method and Limitations

Tasks undertaken to complete the Preliminary Economic and Social Assessment of the proposed rezoning of the Pitt Street Waterfront Precinct are summarised below in Figure 3. It is noted that, as agreed with the client, the methodology used for this study differs to that originally proposed in SGS's proposal, July 2007. A preliminary economic and social assessment was conducted, rather than an impact assessment and prima facie feasibility study as was originally anticipated.

Figure 3. Study Method



Site Visit

A site visit of the Taree LGA and the Pitt Street Waterfront Precinct site was conducted on 26th September 2007. This visit provided SGS with an understanding of the current nature of the site and its position in regards to Taree and other centres in the LGA. This included a broad understanding of the condition and character of existing buildings on the site; the character and land uses in the existing town centre; the nature of surrounding land uses, facilities and access; and obvious on-site development opportunities or encumbrances.

Quantitative Data

A number of data sources were utilised in this assessment to provide an understanding of the current situation and previous trends. Data sources included:

- ABS Census Data (1991-2006) for the Taree LGA, the Mid-North Coast area and NSW;
- Population and dwelling projections data from Taree City Council;
- RP Data Property Data; and
- Further data sources obtained through consultation with agencies and key stakeholders.

Document Review

In order to establish a background context for the Preliminary Economic and Social Assessment, relevant existing documents were reviewed. A number of background reports have been completed to inform the Pitt Street Waterfront Precinct rezoning. These documents were reviewed in addition to notes from Section 62 Consultation carried out by SKM. Planning and policy documents relating to the Taree and Manning Valley area and the wider Mid-North Coast Region were also reviewed. In addition, a review of literature relating to five comparable development 'case studies' was also undertaken. A full list of documents reviewed is included in Section 6.

Consultation

Consultation was undertaken with key external stakeholders and involved a series of face-to-face and telephone interviews. Organisations consulted included:

- Greater Taree City Council (Economic Development Manager, Manager Community Services, Manager Development Control, Coordinator Land Resources Management and Tourism Manager);
- Residential, Commercial and Retail Real Estate Agents active within the Taree area;
- Mid North Coast Tourism Development Board;
- Manning Valley Chamber of Commerce and Taree Chamber of Commerce; and
- Gloria Hays, Organiser of the Taree Farmers Markets

Comparable Case Studies

To compliment the data analysis and consultation undertaken for this study, five developments that are similar in aim to the proposed rezoning of the Pitt Street Waterfront Precinct were documented via information collection, literature reviews, and consultation with developers, development managers and relevant local councils and/or agencies. Organisations consulted included:

- Ariadne Pty Limited
- Dockside Venture Limited
- Australand
- Shellharbour City Council

Input for the Pitt Street Development Brief

Taking into account quantitative data analyses, outcomes from consultation, observations from the site visit, and review of comparative developments, a preliminary assessment of the implications and potential opportunities for the Pitt Street Waterfront Redevelopment site was completed. Innovative ideas based on the experience of the study team were also considered as part of this study. A list of key principles proposed for input into the Pitt Street Development Brief was determined. A summary of the land use implications for the proposed development area are shown in conclusion.

1.3 Structure of this Report

The remainder of the body of the report is presented in five sections as follows:

Section 2 Contextual information including a description of the existing site, key considerations, and potential opportunities. An overview of the regional and local planning policy context relevant to development on the site.

Section 3 Presents residential, retail and commercial, tourism and leisure and community infrastructure and open space market analyses. These assess the current situation in the LGA and Taree Centre, the nature of current and future supply and demand, and the opportunities and implications for the Pitt Street Waterfront Precinct.

Section 4 Identifies and evaluates comparative Marina developments. These case studies were documented to provide some insights into how other regional and coastal towns are developing similar waterfront precincts to and 'lessons learned' from these developments are identified.

Section 5 Provides principles and recommendations to inform the Development Brief for the Pitt Street Waterfront Redevelopment site. This incorporates land use type and mix as well as the appropriate residential, retail/commercial, tourism and leisure and community facility offer. A summary of the land use implications is shown in conclusion.

2 The Pitt Street Waterfront Precinct

This chapter provides an introduction to the Pitt Street waterfront precinct, an overview of the study context and an understanding of the parameters within which our economic and social assessments were based. This chapter was informed by the site visit conducted in September 2007, consultation with key stakeholders, and a review of policy and literature (including the series of draft background reports by other consultants and Section 62 consultation provided by SKM).

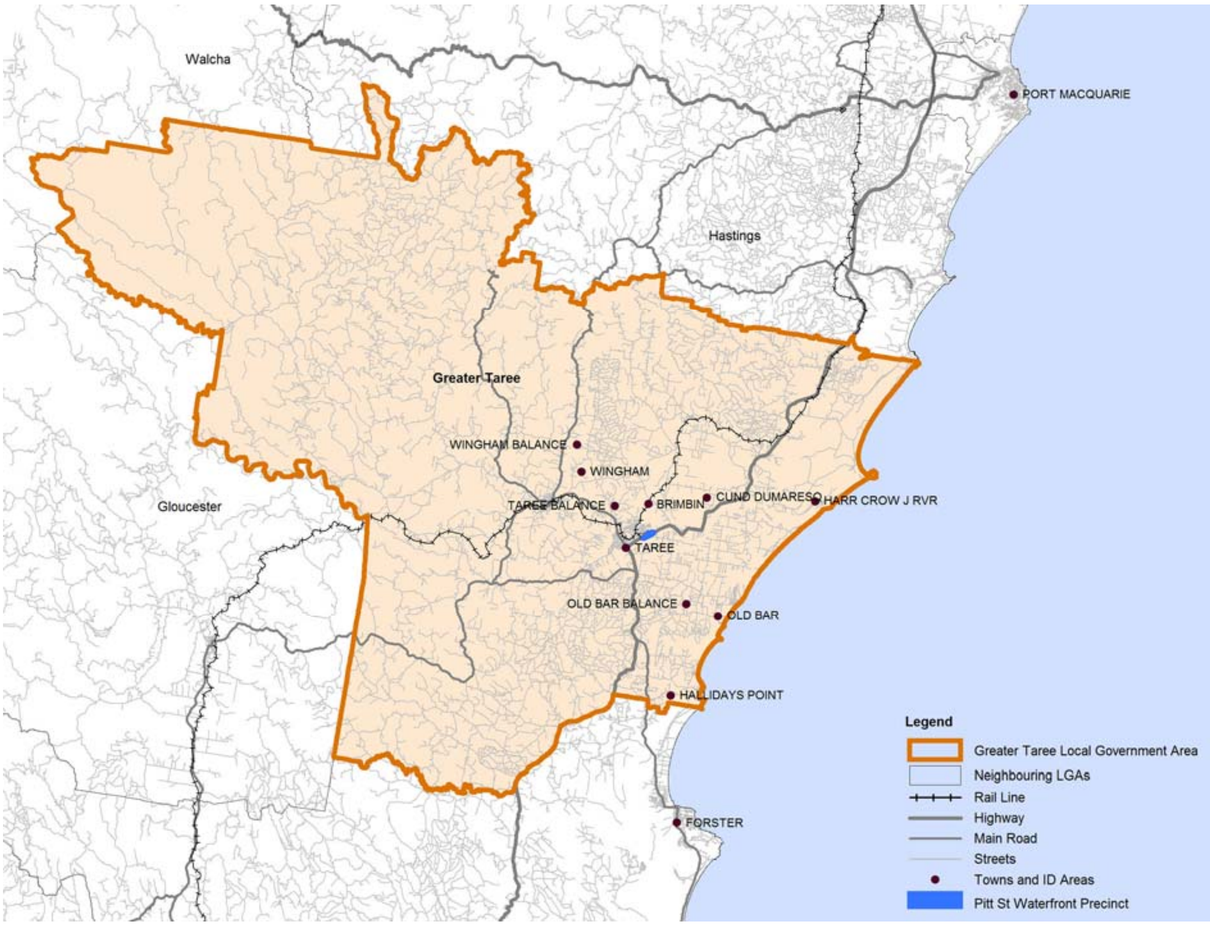
The local and regional context of the Pitt Street site is first discussed below, followed by the overall vision and ideas suggested for the redevelopment of the site identified in the design competition conducted in March 2007. The local and regional policy context of relevance to the site is then summarised. Key considerations relating to potential constraints to development at the site and preliminary identification of opportunities for development at the site are described.

2.1 The Pitt Street Site

The Pitt Street Waterfront Precinct is situated within the Greater Taree Local Government Area (LGA). Greater Taree is an inland LGA located on the mid-north coast of NSW (refer to Figure 4). The Greater Taree LGA is made up of a number of small centres, including Taree, Wingham, Harrington, Hallidays Point and Old Bar. Taree Town Centre is located approximately 80km (1 hour) drive from Port Macquarie and 35km (45 minutes) drive from Forster-Tuncurry. Taree is located approximately 2 hours from Newcastle and three and a half hours north of Sydney. The major roads which connect towns within the Taree LGA and the wider region are the Pacific Highway, Wingham Road and The Bucketts Way.

The Mid North Coast, comprises eight local government areas including Clarence Valley, Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie–Hastings, Greater Taree, and Great Lakes, extends 532 kilometres along NSW's coastline and features many key areas of World Heritage and environmental significance.

Figure 4. Regional Context



Source: Google Earth 2007, SGS Economics and Planning

The study site is located within the suburb of Chatham in Greater Taree LGA and is approximately 2km north-east of the Taree Town Centre on the northern side of the Manning River. The site is bounded by Pitt Street to the north and urban / industrial development adjoining Pioneer Street, Chatham Avenue, McRae Avenue and Manning River Drive to the east. The site is approximately 20ha in area. The site is currently in the ownership of two different entities. The boundary of the proposed site for redevelopment is shown on the figure below.

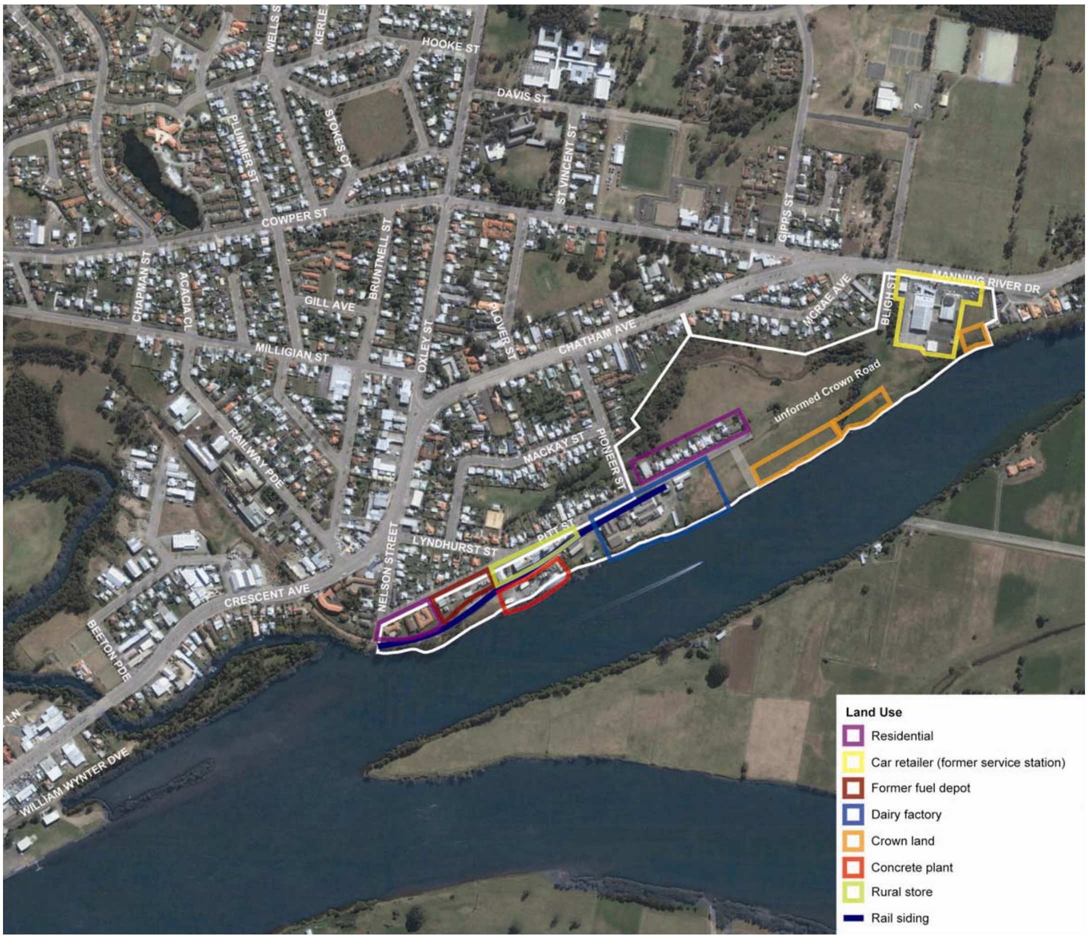
Figure 5. The Pitt Street Waterfront Precinct Site

Source: GTCC, August 2007

Current land use at the site comprises the former Manning River Co-operative Dairy Society (ex Dairy Farmers) factory and agricultural land, together with a small number of commercial, industrial and residential uses. A produce store, Caltex fuel depot and Fisherman's Co-operative are located on the site, in addition to a car dealership on the former "Big Oyster" service station site.

The Manning River adjoins the site on its south east boundary. A minor creek associated with the Manning River system runs through the site and disused wharves are located on the river front. A disused rail spur to the former dairy enters the area at the western end of the site, adjacent to the Manning River. There are two areas of Crown Land on the foreshore area of the site. Figure 6 shows an overview of current land use at the site.

Figure 6. Current Land Use at the Site



Source: SGS Economics and Planning, 2007

The Site Context

Land use adjoining the site includes light commercial activities residential, rural and some open space (refer to Figure 7). The area immediately surrounding the site consists of the following land uses. These are discussed in further detail in Section 2.3 following.

- *Low and some medium density residential development* - north-west of the site area. These are primarily single level residences;
- *Taree town centre* - The Taree City CBD is located approximately 2km to the west of the Pitt Street Waterfront Redevelopment site.
- *Light Commercial* - Land use adjoining the site includes light commercial activities at Manning River Drive. A service station and the 'Big Oyster' are currently located at the site with a frontage on Manning River Drive.
- *Retail / Commercial development* - A district shopping plaza are located in Chatham on Oxley Street, approximately 700m west of the study site

- *The Manning River* - A 2000m rowing course is directly adjacent to the Pitt Street Waterfront Precinct site on the Manning River. The river also hosts power boating, sailing, fishing, waterskiing events.
- *Recreation and Entertainment Centre* - The Taree Recreational Grounds (incorporating the Manning Aquatic and Leisure centre) and the Taree Entertainment Centre are located 500m and 1km respectively to the east of the study site.
- *Open space* – There is open space adjoining the site along the foreshore area, however this is of poor quality and does not have good public access.
- *A disused rail cutting / rail line* - extends to the south west of the site along the river front.
- *Agricultural land and dispersed residences* – to the southern side of the site, across the Manning River.

Figure 7. Land Use At and Surrounding the Site

Commercial Development on the Site, Manning River Drive

Disused Rail Line, South-West of the Site

Residential Development, Chatham Ave

Residential Development, Pitt St

Source: SKM, 2007; SGS Economics & Planning, 2007

2.2 Suggested 'Ideas' for the Future Redevelopment of the Pitt Street Site

The Pitt Street site is considered to be a 'strategically significant' site by many in the community given its waterfront location and proximity to the town centre. As discussed in the Project Brief, the site "*represents a very significant opportunity for comprehensive redevelopment and especially to capitalise on the deep-water frontage … along the Manning River*". The current landowners intent with regard to future development is for mixed use redevelopment of the site, including open space, residential, industrial, commercial, and tourism uses, together with the potential for a marina.

Preliminary options prepared for the site by various urban designers have included features such as restaurants, the possibility of a marina, a re-constructed co-op and markets. Other options for the site, suggested by various stakeholders, include a maritime museum, a community arts centre, local film and sound archives and a bike/peddle car on the disused rail line (SKM, 4 October 2007). The possibility of holiday accommodation and potential for holiday units for boats and residential boat owners has also been suggested (GTCC, 5 June 2007).

This study has 'tested' these ideas for future redevelopment of the Pitt Street site.

2.3 Key Site Considerations

Following is a description of key considerations relating to the site, as identified through the draft findings from other consultants' reports and Section 62 consultation supplied by SKM. These findings have been supplemented with further information obtained by SGS through consultation and literature reviewed by SGS for this study. Key considerations are shown in relation to:

- Ecology and Hydrology;
- Heritage;
- Contamination;
- Traffic and Transport;
- Retail and Commercial;
- Services and Communications Infrastructure;
- Transport Infrastructure;
- Health and Community Wellbeing;
- Open Space and Recreation;
- Local Mixed Use and Marina Development.

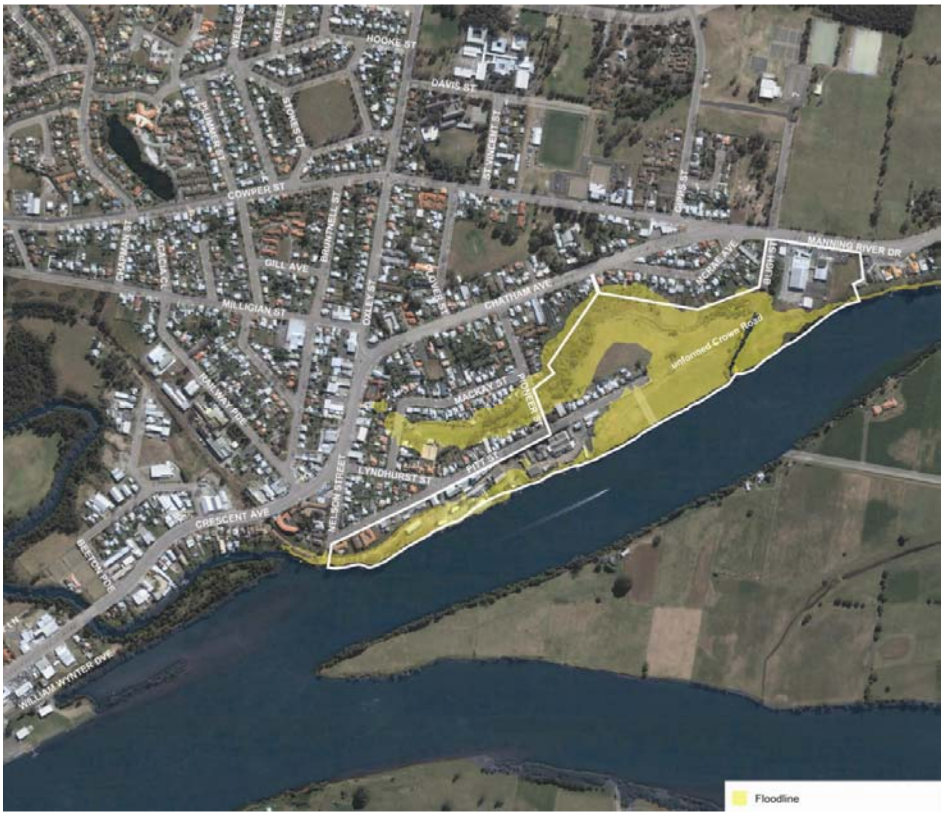
Ecology and Hydrology

As noted above, the majority of the site currently consists of cleared industrial or agricultural land. The draft *Ecological Constraints Assessment* (Ecotone Ecological Consultants Pty Ltd, August 2007), found that the land area of the site is highly disturbed with limited ecological importance for terrestrial flora and fauna. However, riparian vegetation and mangroves along the Manning River provides habitat that is important for aquatic marine life (Ecotone, August 2007).

Consultation with the NSW Department of Water and Energy (30 May 2007) indicated that standard riparian buffer widths are required for the Manning River (40 metres) and the minor creek occurring on the site associated with the Manning River system (20 metres).

In addition, there is a 1 in 100 year floodline in the centre of the site (Figure 8). Issues relating to the servicing of flood prone lands are yet to be resolved (MidCoast Water, 18 May 2007) and therefore the development implications of this floodline are unclear. As advised by the client the remainder of this report assumes that the total site area is developable through the use of infill to raise development above the floodline.

Figure 8. Pitt Street Waterfront Precinct Modelled Flood Line (100 year flood)



Source: GTCC, August 2007

Heritage

The draft *Aboriginal and Historic Heritage Assessment for the Pitt Street Waterfront Redevelopment* (HLA-Envirosciences, September 2007), identified the following possible historic heritage items present at the site:

- The railway siding;
- Manning River Co-operative Dairy Society (ex Dairy Farmers) factory;
- The Produce Store;
- Area of archaeological potential along the Manning River bank (above and below water) - the possible location for maritime history;
- The alignment of Pitt Street;
- Housing along Pitt Street;
- The Big Oyster;
- The Lime Kiln Wharf and Tramway site (immediately adjacent to the site); and
- One Aboriginal site in the southwest corner of the study area, situated on a riverbank levee.

The draft report recommends that the above sites need to be considered in the development of the Masterplan, specifically, the Aboriginal heritage site, the retention and re-use of the Manning River Co-operative Dairy complex and the potential for maritime history in the area. The adaptive reuse of these items have been considered where possible in this study.

It is noted that consultation with the NSW Department of Lands for the proposed rezoning of the Pitt Street site (25 May 2007) has indicated that preliminary investigation suggests that Native Title interests have not been extinguished at the site.

Contamination

The draft *Acid Sulphate Soil and Contamination Assessment and Review*, (Coffey Geotechnics. September 2007), identifies the former fuel depot and the railway siding and dairy factory as potential areas affected by contamination. The draft report found that the majority of the site is considered suitable for landuses including residential, recreational, or commercial uses. The draft report recommends that these sites be subject to further investigation, but indicates that they are able to be remediated.

Traffic and Transport

The draft *Traffic and Transport Study* (Maunsell, August 2007) found that intersections surrounding the site has spare capacity. The draft report tested possible development scenarios to examine the local traffic network capacity[2], and found that, if mitigated, the local traffic network would be able to accommodate the additional traffic generated by redevelopment of the study area.

[2] This testing was carried out according to five scenarios including varying levels of residential, commercial, industrial and recreational development and associated trips (development of up to 250 separate residential dwellings; 200-500 medium density residential units; between 2,500-5,000 sqm of commercial space, 25-100 marina berths and up to 20,000 sqm of industrial land).

The draft *Traffic and Transport Study* also identified that any proposed development at the site will need to be accessible for flood evacuation via direct access to either Pitt Street or Manning River Drive.

Retail and Commercial

The Taree City CBD is located approximately 2km to the west of the Pitt Street Waterfront Redevelopment site. The centre consists of main street retailing, two larger shopping malls as well as commercial office space. The Taree CBD plays an important role as a regional business and service centre and is integral in the LGA's retail hierarchy. In addition to financial and business support services, government departments are also situated within the area including NSW Land and Water Conservation, NSW Forestry, NSW Agriculture, Department of Housing, DEET, Social Security and Family and Community Services.

A commercial cinema and small shopping plaza are located in Chatham on Oxley Street, approximately 700m west of the study site. Manning River Drive contains a number of automotive retail dealerships as well as tourism related commercial uses such as motels.

Retail and commercial development is discussed in further detail in Section 3 of this report.

Services and Communications Infrastructure

Significant constraints exist in the current water and sewer services within the locality of the site. According to MidCoast Water (18 May 2007), servicing cannot be confirmed without further detail regarding the proposed development mix, positions and scale.

The site currently has a fibre optic cable from Adelaide to Brisbane running directly thorough it (GTCC, September 2007; Telstra 31 May 2007; Soul Communications 1 June 2007).

Transport Infrastructure

Taree is located on the main north-south route - south to Sydney and North to Brisbane along the New England and Pacific Highways and is seen to have good highway infrastructure after recent upgrades.

Taree is also well serviced in terms of airport infrastructure and is serviced by regular flights for day-return business and leisure travel. The Taree Airport is fully owned and operated by Greater Taree City Council. Currently Rex Airlines provides 36 direct services between Taree and Sydney each week and the airport also caters for aircraft manufacturers and fabricators, an aircraft restorer and a skydiving school. The airport is located in Cundletown, approximately 8km from Taree city centre and 6km from the Pitt St Waterfront Precinct. Flights are conducted with 34 seat Saab 340 aircraft and the schedule is designed to provide both a day return business schedule and times suitable for leisure travel. Fully inclusive fares start from $109.00 one way to Sydney

The Greater Taree City Council is currently planning and implementing a large expansion project at the Taree Regional Airport in an effort to attract aviation related businesses. Consultation has indicated that there is a growing demand for hangers for both personal and business use and Council are interested in capitalising upon this. Constraints identified for the future development and growth of the airport and number of services includes the improving road connection between Sydney and Taree, proximity to Newcastle Airport and Williamtown which caters for low-budget carriers (Jetstar and Virgin) and the higher flight costs than neighbouring airports.

The Taree LGA is characterised by high car dependence and poor access to public transport. Bus services are infrequent and there are few services outside of school hours, discussed in Section 3.1 following.

Health and Community Wellbeing

Key considerations with regard to crime and safety as identified through SKM's consultation with the Manning Great Lakes Crime Management Unit of Taree Police (19 July 2007) include using lighting and landscaping to create opportunities for natural surveillance. Displaying a strong sense of ownership (private or public), ensuring good management of activities, space and the environment at the site, and controlling access to the site were also identified.

Consultation with Hunter New England NSW Health (SKM, 25 June 2007) identified a number of key considerations with regard to health and community wellbeing. These included consideration of:

- Providing appropriate buffer zones to prevent dust, noise and odour emissions from proposed industry that may cause a nuisance or affect the health of existing and proposed residents;
- Providing diversity in housing density that will promote walkability without adversely affecting housing affordability;
- Providing high quality walking and cycling paths that also have disabled access;
- Ensuring there are opportunities for participation in the planning process, by considering the views of current community members and incorporating their views into the planning process;
- Ensuring that the facilities provided at the site meet a variety of peoples' needs, by providing a range of facilities to different members of the community; and
- Incorporating low traffic volume methods into road design to ensure pedestrian safety (Hunter New England NSW Health, 25 June 2007).

Open Space and Recreation

In terms of open space and recreation, there are a nubme3r of issues to consider. A 2000m rowing course is directly adjacent to the Pitt Street Waterfront Precinct site on the Manning River. The course has eight lanes plus a transit lane along the northern bank of the Manning River. This course is used regularly throughout the year for training and racing with a number of regional and NSW Rowing Association Regattas held each year. In addition to rowing and powerboat events, the river hosts sailing, fishing, waterskiing events. Correspondence from Manning River Rowing

Club to GTCC (15 June 2007), indicates that the development of jetties or a marina at the site should be designed and located so as not to conflict with the course.

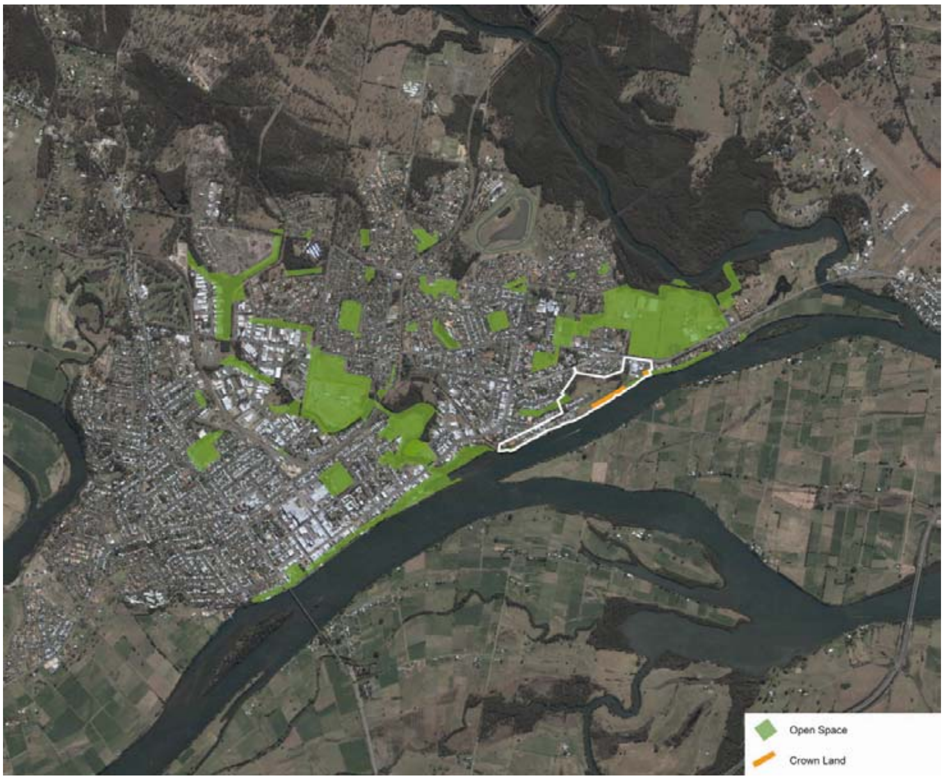
The Taree Recreational Grounds (incorporating the Manning Aquatic and Leisure centre) and the Taree Entertainment Centre are located 500m and 1km respectively to the east of the study site.

As shown in Figure 9, the site is located between public open space at the foreshore to the east of the site and public open space to the west of the site along the riverfront. However, this adjoining open space is of poor quality and does not have good public access. The site does not currently offer public access to the river foreshore, and lacks connections to parks and open space to the north of the site and the Taree City Centre.

The draft *Traffic and Transport Study* showed that the existing cycling facilities within Taree are limited. However, GTCC has indicated that it is anticipated that a pedestrian and cycle path, funded under NSW Coastline Cycleway Grants Program, will be constructed along the riverfront connecting the site to the town centre.

Pedestrian traffic in the area is low, and pedestrian facilities are limited (with poor quality or lack of) pedestrian footpaths in the residential area surrounding the site.

Figure 9. Open Space and Recreation



Source: GTCC, SGS Economics and Planning, 2007

As shown in the figure above, there are two areas of Crown Land at the site. These lands are 30.48m wide foreshore reserves. The NSW Department of Lands specifies that if retained by the

Crown, future use of this land might include retention of use for future public open space requirements. The NSW Department of Lands (25 May 2007) has indicated that there is the option available to transfer ownership of the land from the Crown to GTCC. However, if this was to occur, the NSW Department of Lands has indicated that the strategic planning of the site would need to recognise the Department's desire to improve the public domain by providing contiguous access along the foreshore area (from Nelson Street to Ochiltree Place to the north of the site).

Consultation with Hunter New England Department of Health (25 June 2007), indicated their desire to see the site provide for quality open space with community facilities such as BBQs, picnic areas, sporting facilities and disabled access.

Open space and recreation is discussed in further detail in Section 3 of this report.

Local Mixed Use and Marina Development

Following is an overview of two recent developments within the Taree LGA which are similar to the Pitt Street site.

Development within the Taree Centre

Recently a site on the corner of Macquarie and Victoria streets adjacent to the Manning River was rezoned for mixed use development to enable development a combination of uses comprising residential, retail, commercial, tourist accommodation. The latest design concept proposes three to five storeys attached mixed use buildings incorporating retail and commercial activities, residential units, restaurants and serviced apartments. The potential for conference and function facilities at the site has been identified and the site adjoins a foreshore public reserve and will provide foreshore activities (BCI Australia). The timing of this development will need to be monitored.

A submission by the Economic Development Manager GTCC regarding the rezoning of this site noted that "the project will change the perception of Taree and prove to be a catalyst for similar development which will increase economic opportunities and enhance the amenity and streetscape of Taree: (GTCC 8th March 2006).

Aside from this development, there appears to be no other similar developments located within close proximity to the study site and certainly no sites with similar levels of amenity, size and location on the riverfront. Further detail relating to the proposed development at this site is currently unclear.

Similar development in the wider LGA

Harrington Waters is a master planned Marina development on the coast, approximately 20 minutes drive east of Taree. Currently the development incorporates a 20 berth Marina (with plans for more berths in the future), associated maritime retail, village shops, a resort and tavern complex and a golf course. This development is discussed in further detail in Section 4 and in Appendix D.

2.4 The Policy Context

The Regional Policy Context

The *Draft Mid North Coast Regional Strategy* (2006) has identified the Mid-North Coast region as a 'region of opportunity', one that continues to attract those seeking a lifestyle change or place to retire. The *Draft Mid North Coast Regional Strategy* (2006) aims to ensure the prosperity in the region over the next 25 years through the protection of high value environments and habitat corridors, cultural and Aboriginal heritage and scenic landscapes, the provision of up to 58,400 new homes by 2031 (accommodating a forecast increase of 91,000 people). With smaller households and an ageing population, the plan aims to encourage a more suitable mix of housing, including more multi-unit style dwellings.

The *Draft Strategy* aims to ensure an adequate supply of land to support economic growth and an additional 47,000 jobs. Taree is designated in the *Draft Strategy* as a 'major regional centre' emphasising the NSW Department of Planning's desire to promote growth and re/development in the area.

The Hunter Regional Environment Plan, 1989 (REP) applies to Greater Taree LGA. This REP discourages retail and commercial development in out-of-centre locations, including outside of Taree Sub-Regional Centre. Clause 19(a) and 20(2)(a) indicate that:

- In considering an application to provide for an increase in commercial or retail development, the council should consider whether the development is likely to have a detrimental impact on the existing or potential function of land in [an existing] regional, subregional or district centre [Clause 19(a)].
- Councils should encourage retailing, office and associated service functions in the central business district and subregional and district centres [Clause 20(2)(a)].

The Local Policy Context

The *GTCC Local Growth Management Strategy* (GTCC, 2007) was submitted to the NSW Department of Planning in 2007 to inform the development of the *Mid North Coast Regional Development Strategy*[3]. The strategy identifies the potential future growth areas within the Greater Taree LGA. This local strategy contains population and dwelling projections at the local area level. These projections show that Greater Taree is likely to experience 34 percent growth in population over the next 25 years, an increase of 23,153 people. The population and dwelling projections contained within the Growth Management Strategy are discussed in further detail in the Housing Market Analysis contained in Section 3 of this report.

[3] Consultation with GTCC for this study indicated that the recent population projections and dwelling forecasts contained in this document take into account GTCC's policy aspirations. This document is currently being reviewed by the NSW Department of Planning.

GTCC's Strategic Plan, *Twenty Twenty Vision 2005-2020* is a further local policy document of relevance to this study. This document sets out Council's objectives relating to the Manning River, the local economy, urban development and the community. The document contains the following aims of Council of relevance to this study.

Manning River

- Prepare and implement plans for land and water based activities and waterfront facilities;
- Develop tourism potential as well as passive and active recreations interests;
- Protect existing boat building, oyster and farming industries while extending commercial potential;
- Monitor and address riverfront amenity and security issues;
- Promote the provision of boating access and related facilities;
- Encourage high quality residential opportunities particularly in proximity to the CBD; and
- Encourage the provision of tourism, recreation and commercial facilities in proximity to population centres.

Economy

- Identify opportunities for regional specialisation.
- Encourage the establishment of a broad employment base for those seeking local employment with an emphasis on youth.
- Encourage quality commercial and industrial development that is compatible with community amenity.
- Encourage private sector investment.

Urban and Rural Development

- Plan for an appropriate mix of residential accommodation.
- Ensure provision of appropriate infrastructure and public facilities through strategic land use planning.
- Give emphasis to the visual amenity, protection and safety issues in policy formulation.

Community

- Access local, regional, state and federal funding to ensure equitable access to basic needs and community services.
- Support the development of employment programmes that contribute to or maintain the well-being of the community.
- Encourage and support healthy lifestyles, complemented by recreational, sporting and cultural opportunities.
- Advocate for an adequate level of health and aged care services.
- Continue to promote the cultural development of Greater Taree with the provision of appropriate facilities and programmes.

The Draft *Taree Conservation and Development Strategy 2005* develops a vision and set of strategies for the Greater Taree LGA and how it relates to its surrounding area to ensure that conservation and development are balanced into the future. The Strategy outlines a draft commercial centre hierarchy which follows the settlement hierarchy. This hierarchy is shown in Table 1 below.

Table 1. Draft Centres Hierarchy

Regional Centre	Taree
Town	Old Bar – Walabi Point, Wingham, Hallidays Point (Diamond Beach, Red Head, Black Head and Tallwoods) Harrington
Village	Coopernook, Crowdy Head, Cundletown, Elands, Hannam Vale, Johns River, Krambach, Landsdowne, manning Point, Moorland, Mount George, Tinonee
Rural Localities	Bobbin, Burrell Creek, Crocki, Dyers Crossing, Killabakh, Oxley Island Village, Upper Landsdowne, Rainbow Flat, Wherrol Flat

Source: *Draft Taree Conservation and Development Strategy 2005*

2.5 Summary of Constraints and Development Opportunities

The following key considerations relating to potential constraints on development at the site have been identified through findings described in this Section. A number of preliminary opportunities for the future redevelopment of the site were also identified by SGS. The opportunities identified in this Section are further developed through the preliminary Economic Assessment and Social / Community Assessment in the following sections of the report.

Summary of Key Considerations

Overall

Future development at the site should take the following into consideration:

- Ecological, contamination, traffic and infrastructure (water and sewer) constraints. It is noted, however draft studies reviewed indicate the potential limitations identified within the draft studies reviewed are likely to be able to be mitigated.
- A significant component of the site is affected by flooding. The extent to which this issue constrains the area of future development at the site will need to be determined through further studies. In particular further studies will require determination of the potential to excavate this area as a marina, and the feasibility of addressing this issue through infill.
- The total site area is held by two land owners. This may influence the location of land use at the site and timing of development at the site.
- The timing, and land use within proposed developments at Taree. In particular, the mixed use rezoning on the corner of Macquarie and Victoria Streets, adjacent to the Manning River in Taree.
- The character of surrounding land use.

Residential Development

Future development at the site should take the following into consideration:

- A significant area of the site is adjacent to residential development. Future development at the site needs ensure that an appropriate buffer zones and mitigation measures are included to prevent noise, construction issues etc affecting existing residents.
- There is potential for adverse impacts on housing affordability. This issue was raised through consultation with Hunter New England NSW Health.

Commercial and Retail Development

Future development at the site should take the following into consideration:

- The potential for economic impacts of the future redevelopment at the site on the Taree Town Centre and Chatham district shopping centre.

Tourism and Leisure

Future development at the site should take the following into consideration:

- The development of a marina or jetties at the site should be designed and located so as not to conflict with current activities on the Manning River, including the 2000m rowing course directly adjacent to the site.

Community

Future development at the site should take the following into consideration:

- Crime and safety issues need to be taken into account in future development at the Pitt Street site.
- Opportunities should be provided for community participation in future planning of the site.
- Future design of the site should address the NSW Department of Land's requirements – to either incorporate the two areas of Crown Land into future design of the site, or recognise the Department's desire to improve the public domain.

Possible Opportunities

The following site characteristics have been identified to provide opportunities for its redevelopment. The site is:

- A unique site with river frontage. The site is likely to offer significant potential for future residential, retail and commercial, tourism and leisure and community related development.
- A large land holding which is largely cleared. The studies reviewed for this report indicate that development potential at the site is relatively unconstrained.
- In close proximity to services, retail and commercial development, as well as transport infrastructure.

The site generally provides an opportunity to:

- Build connections between the site and the town centre. There is particular potential for river-based, pedestrian and bicycle connections.
- Enhance land use in the surrounding area. The site provides the opportunity to build links with surrounding recreational, open space, entertainment land use.

- Meet regional and local policy objectives. Particularly in relation to the improving the role of the Manning River, providing for future residential development and economic growth, as well as some objectives relating to the local community.
- Contribute to Taree's position at a Regional Centre. Through improving the centre's attractiveness and providing for future population and employment growth within the regional centre area.
- Be well serviced by telecommunications infrastructure. Future development at the site has potential to be connected to the fibre optic cable currently running through the site.

Residential Development

The site provides an opportunity to:

- Provide a suitable mix of housing for the future population, including more multi-storey unit style dwellings, as identified in local and regional policy objectives. An opportunity to provide for increased density while promoting walkability.
- Contribute to future dwelling targets in the Mid North Coast area in general.

Commercial and Retail Development

The site provides an opportunity to:

- Create a unique retail and commercial offer. Retail / commercial offer at the site would need to be distinct from Taree City Centre and Chatham District shopping centre.
- Provide commercial development in an exposed location. The 'Big Oyster' site / Ford Dealership site on Manning River Drive in particular.
- Provide for future employment targets and economic development in the Mid North Coast area in general.

Tourism and Leisure

The site provides an opportunity to:

- Improve the experience of visitors to Taree. For example, by creating access and vantage points to view events on the Manning River and to cater for visitors to Taree for these events.
- Contribute to the tourism and leisure offer in Taree.

Community

The site provides an opportunity to:

- Incorporate local heritage into the design and development of the site. The potential heritage items at the site and maritime history in the area should be considered in the future masterplanning of the Pitt Street site.
- Provide equitable access to public open space. An opportunity to provide for equitable access to public open space at the Manning River foreshore for locals and visitors.
- Provide quality open space and facilities. Potential to provide bbq facilities, children's playground etc.
- Provide health and fitness opportunities. An opportunity to provide high quality walking, cycling and wheelchair paths along the foreshore area.

3 Market Analysis

The following chapter outlines the current residential, retail and commercial, tourism and leisure markets in Greater Taree as well as community infrastructure. The results of these analyses are shown in terms of current context, existing supply and projected future demand. Key implications and opportunities for the Pitt Street Waterfront site area identified following from each market analysis.

This chapter of the report first contains a 'snapshot summary' of the local and regional context, followed by an analysis of each of the following markets in Taree and the surrounding region:

- Residential;
- Retail and Commercial;
- Tourism and Leisure; and
- Community Infrastructure.

This analysis is based on 2001 and 2006 ABS Census data, findings from the *Taree Economic Profile: Current Structure and Future Directions (HVRF 2005),* population and dwelling projections contained within the *GTCC Local Growth Management Strategy 2007,* RP Data, as well as industry and stakeholder consultation. Population, housing, employment and floorspace modelling work by SGS also informed these findings. Appendix A contains detailed results of this analysis. Where possible, Greater Taree LGA has been compared and contrasted with the Mid-North Coast region and NSW.

3.1 Overview of the Local and Regional Context

Following is an overview of the demographic and socio-economic characteristics of Greater Taree LGA.

Demographic Characteristics

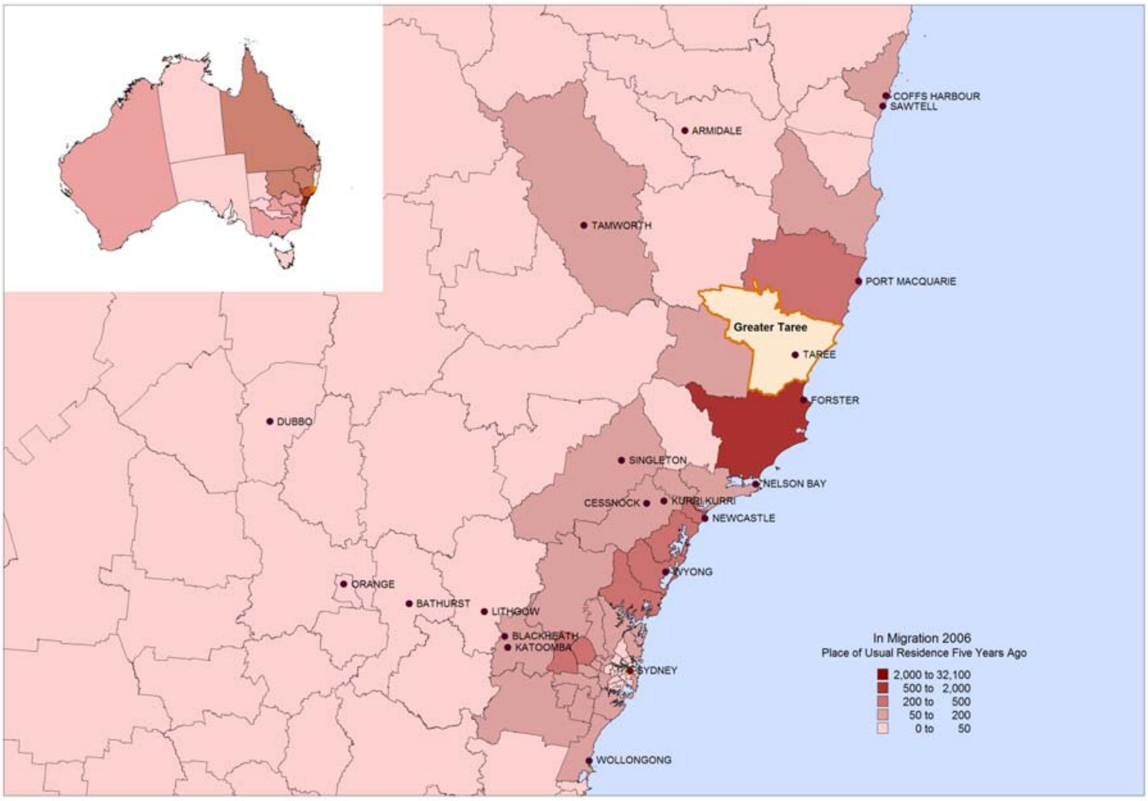
The population of Greater Taree LGA has the following characteristics:

- **Steady population growth over the past decade.** Between 1996 and 2006, the population of Greater Taree grew by 2,804 persons to 45,144 (representing a total population change of 6.6 percent over this period). This was slightly lower than the Mid North Coast average over the same period (a total population change of 8.6 percent).
- **The current population of Greater Taree is concentrated in existing centres.** The coastal centres of Hallidays Point, and Old Bar have the highest population density, followed by the area surrounding Taree town centre.
- **A rapidly ageing population.** Currently the median age in Greater Taree is 43 years. This is considerably higher than the NSW median of 37 years but similar to the mid-north coast. The median age in Taree has increased from 37 years in 1996 and 40 years in 2001. This is consistent with trends on the Mid North Coast generally.
- **A high proportion of smaller household types.** The Taree LGA, and Mid-North Coast generally, have a significantly higher proportion of 'couple families without children' (44.8 percent and 45.0 percent respectively), compared with the NSW average (38.0 percent).

Coupled with high median age in the area, this is likely to be indicative of the large number of retirees living in the area without children.

- **New residents to the LGA are predominantly from neighbouring coastal LGAs and the Central Coast.** The Great Lakes and Port Macquarie Hastings LGAs and the Central Coast (Gosford and Wyong) are the source of the majority of Taree's new residents (refer to Figure 10).

Figure 10. Major Origins of People Moving to Greater Taree LGA, 2001-06



Source: SGS Economics and Planning 2007, ABS 2006

Socio-Economic Characteristics

The population of Greater Taree LGA has the following characteristics:

- A high proportion of low income households and a low proportion of high income households. The average household income in Greater Taree was $635 a week. However, the number of higher income households in Greater Taree has grown over the past five years with the proportion of households earning over $2,000 per week increasing from 2.5 percent in 2001 to 5.5 percent in 2006.
- High rates of unemployment, particularly for youth, young adults and Indigenous people. Males aged 20 to 24 had the highest concentration of unemployment in 2004 with 19.1 percent, particularly indigenous males who had 38.3 percent unemployment.

- Unemployment is declining. Since 2001 Taree's unemployment rate has steadily declined (from 12.2%), reaching below 7 percent unemployment in 2004 and in mid 2004, Taree's unemployment rate was around 8 percent[4].
- High car dependence and poor access to public transport. As discussed in Section 2.3, there is a very high level of car dependence in Taree, with a high percentage of residents driving their cars to work (58.5 percent), compared to the Mid North Coast (57 percent) and NSW (54.1 percent).

3.2 Residential Market Analysis

The following residential market analysis was informed through a detailed analysis of recent Census data, RP Data and the results of SGS's housing demand modelling shown in Appendix A as well as consultation with local real estate agents.

3.2.1 Profile of the Current Residential Market

Greater Taree LGA's housing market has the following characteristics:

- A lack of housing diversity and choice. Three bedroom, detached dwellings clearly dominate the local housing market. The market is dominated by the 'traditional' housing form of 600-700 square metre separate houses with ensuite, double garage, and three plus bedrooms. There are currently limited opportunities to purchase quality, 'high end' properties in Taree.
- A small but growing trend towards increased density in recent years. Although 'semi-detached' dwellings do not feature strongly in the Greater Taree dwelling profile in 2006, this dwelling type has experienced the most significant growth over the last decade; registering an increase of around 20 percent from 1996. 'Flats/units' have also experienced notable growth (around 15 percent) and separate houses experienced growth of 14 percent.
- A housing market dominated by owner-occupiers. Approximately 70 percent of the Greater Taree LGA's population either fully owned or was purchasing their home in 2006. The proportion of 'full ownership', in particular, was slightly higher than the Mid-North Coast benchmark and significantly higher than NSW.
- Relatively more affordable housing than wider region, particularly the coast. Currently median prices in Greater Taree are $40,000 to $50,000 less than the Mid-North Coast benchmark. In 2006, the median price for separate dwellings in Greater Taree was $248,000 (compared with $300,000 for Mid-North Coast) and the median price for medium density dwellings in Greater Taree was $205,000 (compared with $250,000 for Mid-North Coast).
- A declining residential sales market in recent years. There has been a significant decline in the number of sales in Greater Taree, and the Mid-North Coast over the last five years. However, local property agents are optimistic that this decline in sales activity is likely to reverse, commenting that the stabilisation in prices and cheaper market in Taree might once again drive buyer interest in Greater Taree thus producing more listings.

[4] Hunter Valley Research Foundation (2005) *Greater Taree Economic Profile – Current Structure and Future Directions*

3.2.2 Housing Demand

This section reports on future population and housing demand projections for Greater Taree LGA. The analysis draws on data from the following sources. (Refer to Appendix A for further detail).

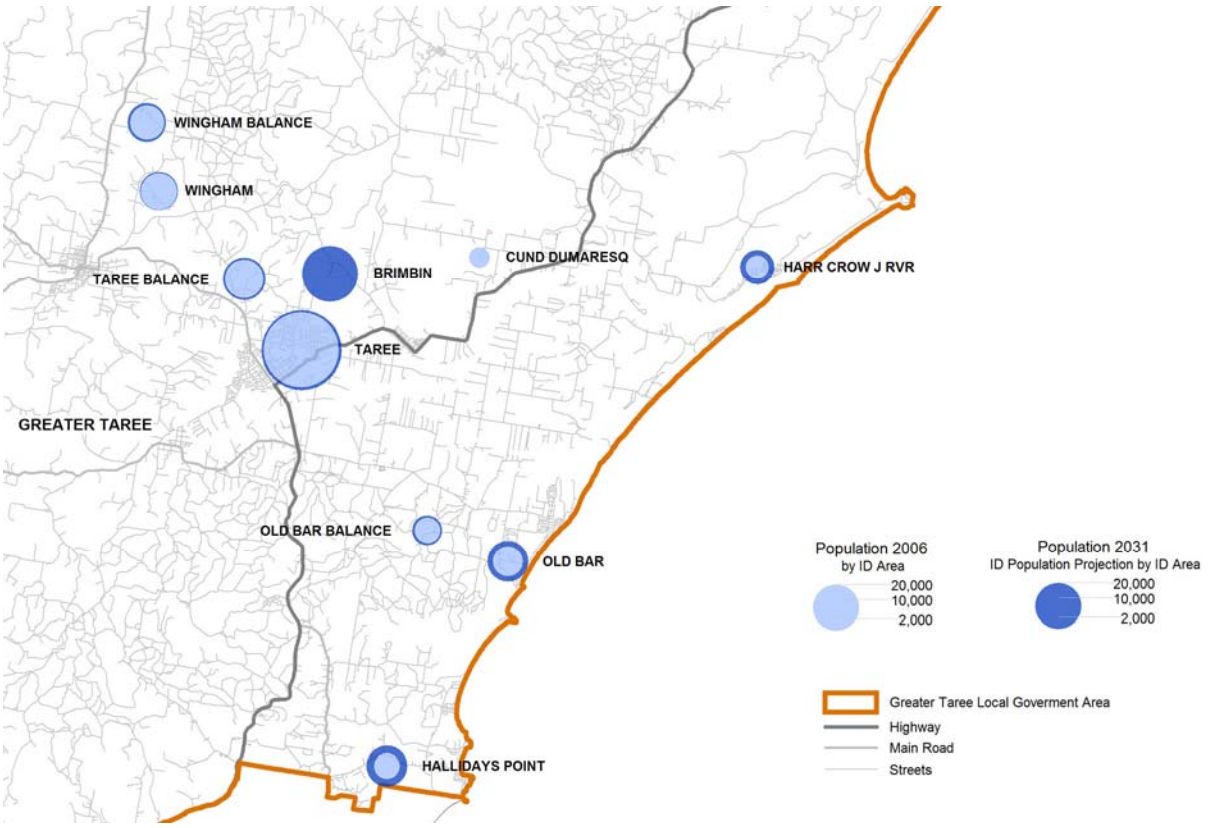
- Population and Dwelling Projections contained in the *GTCC Local Growth Management Strategy, 2007;*
- Transport and Population Data Centre projections by age, 2004; and
- SGS's estimates of future dwelling demand by housing type based on population growth.

Following is a summary of findings in relation to the population growth likely to drive future housing demand in Taree.

The population of Taree is expected to grow in the 25 years to 2031. The *GTCC Local Growth Management Strategy, 2007* shows that Greater Taree is likely to experience 34 percent growth in population over the next 25 years, an increase of 23,153 people.

Much of this growth is expected to be accommodated in the town of Taree. The coastal centres of Old Bar, Hallidays Point, and Crowdy/ Harrington/ Johns River are also expected to experience a significant increase in population to 2031. Greenfield development at Brimbin has also been identified as an area which might cater for future population growth (Figure 11).

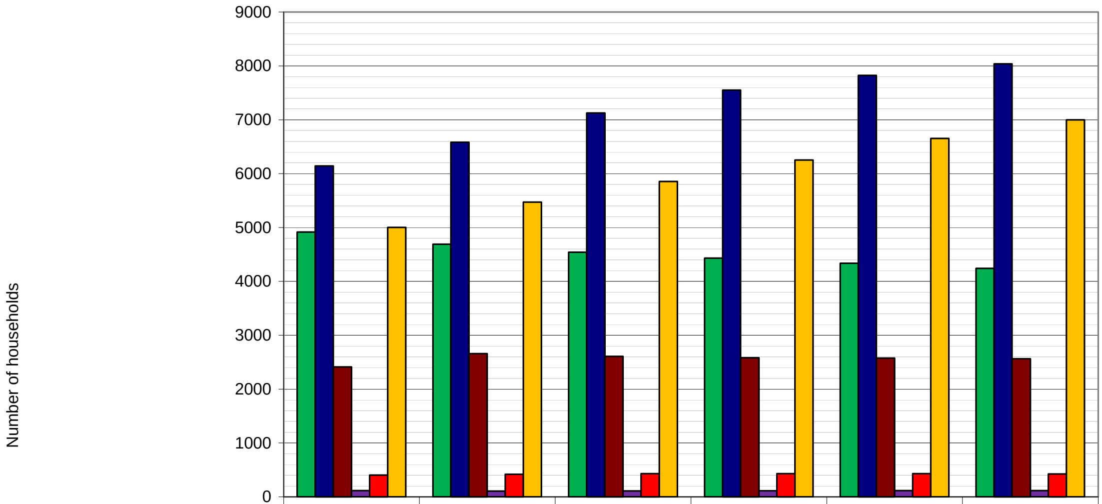
Figure 11. Population Projections, Greater Taree LGA, 2006-2031



Source: SGS Economics and Planning, 2007, (based on GTCC, 2007)

The number of people living in couple families without children and lone person households are expected to grow most rapidly. SGS's estimates of future population, broken down by family type for Greater Taree suggest that people living in couple families with children are expected to experience relatively small growth in Greater Taree while individuals living in couple families without children and lone person households are expected to grow most rapidly (Figure 12).

Figure 12. Change in Household Type, Greater Taree LGA, 2006-2031



	2006	2011	2016	2021	2026	2031
Couple family with children households	4,917	4,689	4,543	4,433	4,336	4,241
Couple family without children households	6,143	6,582	7,124	7,552	7,823	8,036
One parent family households	2,411	2,657	2,608	2,581	2,575	2,564
Other family households	116	107	111	114	116	118
Group households	406	420	429	432	429	427
Lone person households	5,004	5,475	5,855	6,254	6,655	6,999

Source: TPDC 2004

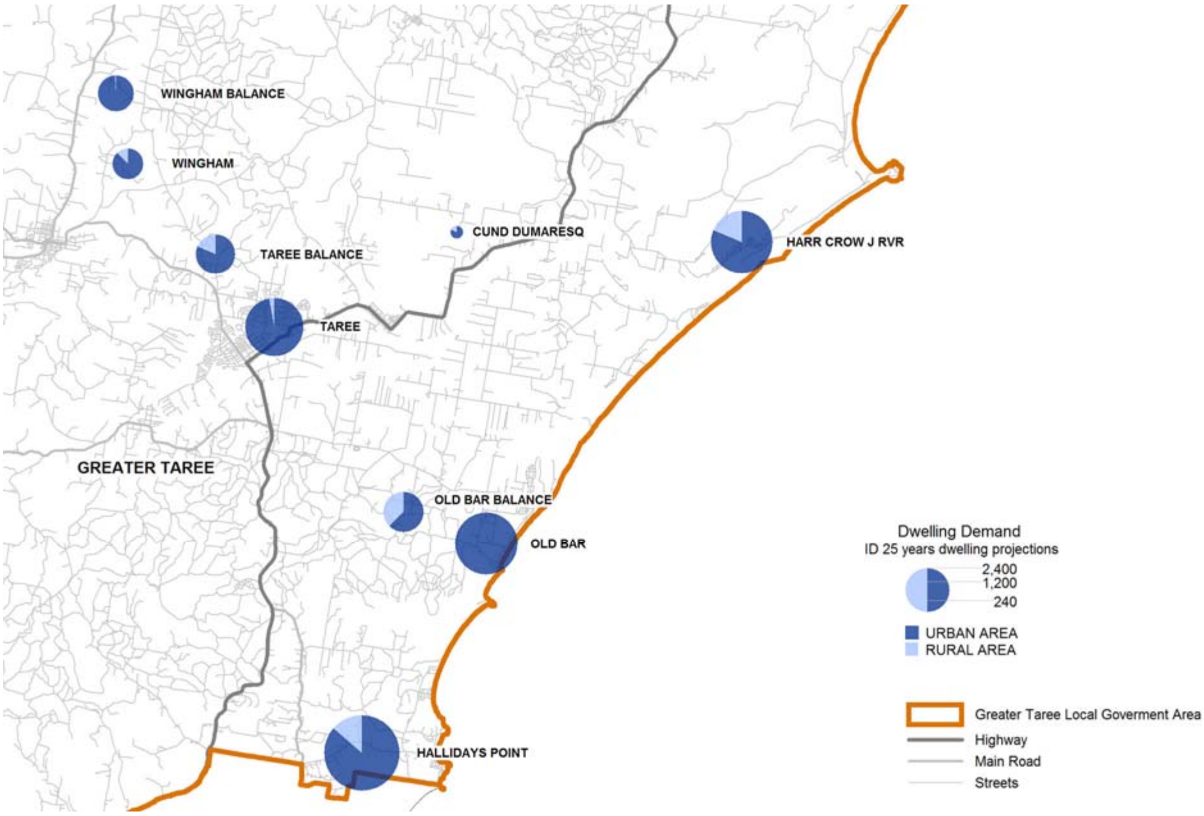
Following is a summary of findings in relation to the future housing demand in Taree. The *GTCC Local Growth Management Strategy, 2007* contains dwelling demand projections (25 year forecasts) based on the following three scenarios:

1. Increase in dwellings based on 2001-2006 Dwelling Construction Rate
2. Increase in dwellings based on 1% Population Growth Rate
3. Increase in dwellings based on 1.25% Population Growth Rate

The three scenarios tested in the *GTCC Local Growth Management Strategy, 2007* show that the Greater Taree LGA will need to cater for between 9,750 to 11,000 additional dwellings to 2031.

Much of this growth is anticipated to occur in Inner Taree, and the urban coastal areas of the LGA, including Old Bar, Hallidays Point, and Crowdy/Harrington/Johns River. Based on previous construction trends, Halliday's Point is expected to accommodate an additional 2,035 dwellings, Old Bar (1,600 dwellings) and Crowdy/Harrington/Johns River (1,315 dwellings). An additional 1,370 dwellings is projected for the urban area of Taree (Figure 13).

Figure 13. GTCC Dwelling Demand Forecasts, 2006-2031



Source: SGS Economics and Planning, 2007, (based on GTCC, 2007)

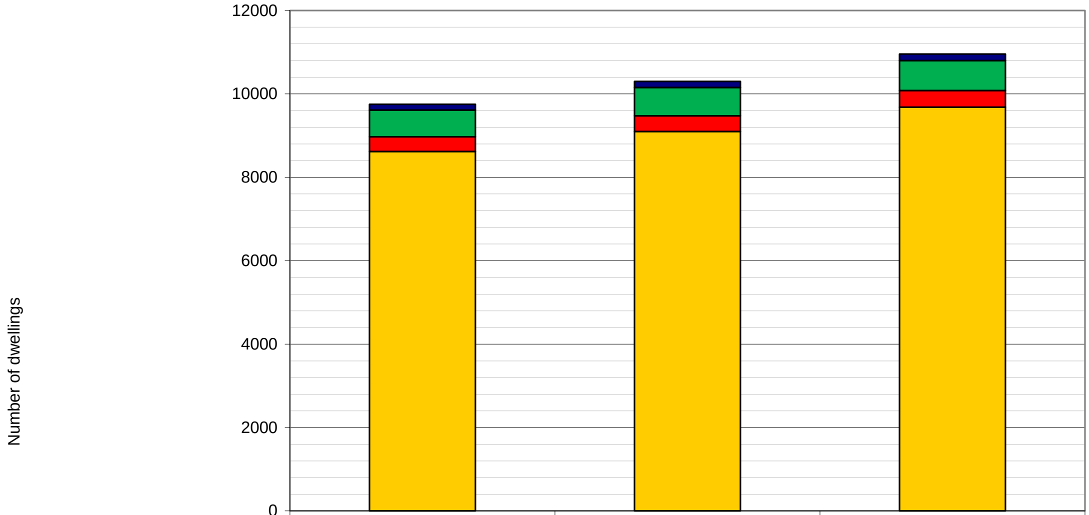
Along with an increase in the number of dwellings, the *type* of dwelling in demand is an important consideration. Demand for more housing in Greater Taree is driven by population growth, as well as demographic change and social trends leading to changes in family and household types resulting in smaller households.

SGS's Dwelling Forecast Model was used to determine likely future housing demand by household type. It is noted that the results of the Dwelling Forecast Model are based on previous trends and are therefore likely to be a strong reflection of the current supply of dwellings in the market. It is noted however, that in making housing choices, people may trade off location and amenity for housing types and cost. For example, people might trade off lot size and housing type for views or location. The type of dwellings demanded in Taree might also be the result of changing preferences and cultural shifts.

SGS's dwelling demand estimates show that, if current trends were to continue, most demand for future housing in the LGA to 2031 is likely to be for separate dwellings and demand for three bedroom houses in particular is likely to dominate demand in the region (refer to Appendix A).

However, the estimates also indicate that there is likely to be an increase in demand for medium-density housing (semi-detached/row/town houses) and high density (flats/units/apartments)[5]. SGS's housing demand projections identify the likely future demand for between 351 and 402 additional medium-density dwellings and between 642 and 716 additional high density dwellings within the Greater Taree LGA (Figure 14).

Figure 14. Change by Dwelling Type, Greater Taree LGA, 2006-2031



	Scenario 1 (Total increase in dwellings: 9,755)	Scenario 2 (Total increase in dwellings: 10,300)	Scenario 3 (Total increase in dwellings: 10,957)
Other	141	148	158
Flat / unit / apartment	642	676	716
Semi-detached / row / terrace / townhouse	351	374	402
Separate house	8,621	9,102	9,681

Source: SGS Dwelling Forecast Model

Drivers of Demand

Agent consultation, specific to the urban area of Taree, was used to provide more detail relating to residential demand in Taree. Consultation with agents indicated that future housing demand in this area is likely to be driven by the following trends[6]:

- **Diversity in housing supply is a key characteristic of a well functioning housing market.** Agents commented that demand for separate houses is likely to shift as people become more exposed to a different housing offer – higher quality, higher density, new types of development and urban design outcomes, or offering variety in location, or availability of views.

[5] These projections are for types of dwellings, based on the Australian Bureau of Statistics Census reporting of the type of dwelling, not necessarily the density of a development.

[6] It is important to note that agent opinions are generally based on their knowledge of the current housing offer and trends in Taree. If there was to be a change in the type of housing offer available in Taree (an increase in density for example) this may serve to change some of the key drivers identified.

- **Demand for future dwellings is likely to emanate from the existing resident population**. Taree is not driven by a holiday market (a trait characteristic of the surrounding coastal areas), rather, large number of permanent residents are employed in the town particularly within the hospital and key local industries.

- **Some demand will come from an ageing population and the influx of retirees and 'sea changers' to the area**. This is likely to drive demand for housing types in high amenity locations and in areas that are well serviced by health services, entertainment, retail and community infrastructure.

- **Owner-occupiers will continue to dominate the future housing market.** The residential market is not an investor market with the majority of demand for dwellings coming from the existing resident owner-occupiers and an influx of retirees to the area.

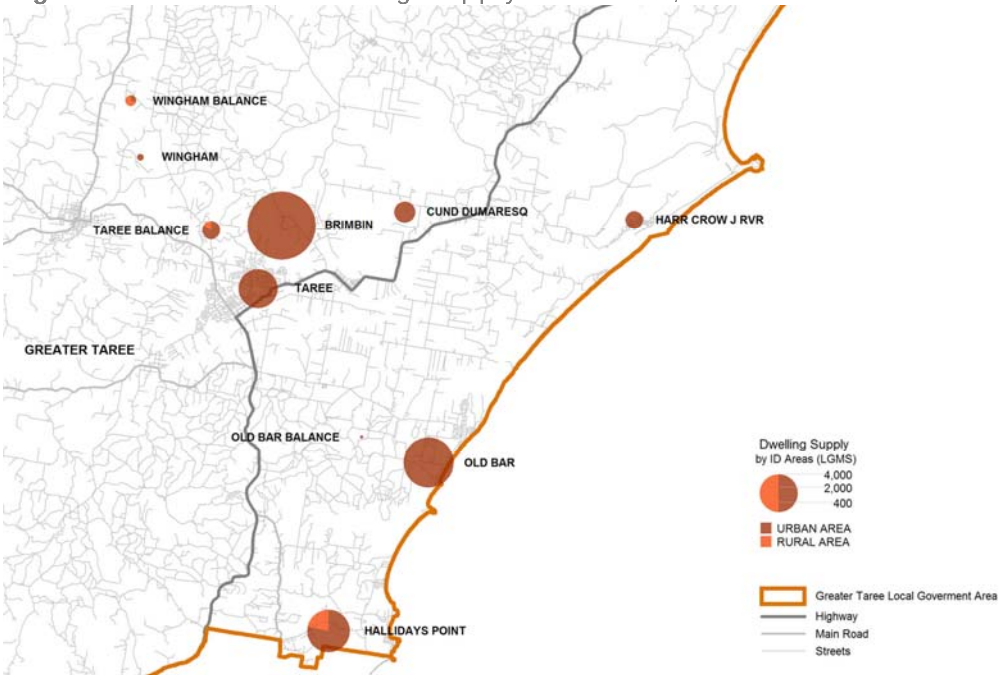
- **The relative affordability of housing in Taree will continue to drive demand for housing in the area**. This trend stems from the relative affordability of Taree, compared with nearby coastal areas in particular.

3.2.3 Housing Supply

Following is a summary of findings in relation to the future housing *supply* in Taree. Greater Taree Supply projections from the *GTCC Local Growth Management Strategy, 2007* indicate that an expected future yield of 12,500 additional dwellings can be accommodated across the Greater Taree LGA to 2031.

Most new housing supply is forecast to be located in the Taree town centre area and the urban coastal areas shown in Figure 15. Up to 1,566 dwellings are forecast to be supplied in Taree however, Greenfield development at Brimbin has been identified by the GTCC as an area to cater for the majority of future dwellings (4,000 new dwellings are forecast to be supplied in this area).

Figure 15. GTCC Dwelling Supply Forecasts, 2006-2031



Source: SGS Economics and Planning, 2007, (based on GTCC, 2007)

The above analysis shows that there is likely to be an adequate supply of new housing to ensure that the Greater Taree market remains 'affordable' into the medium term. This was confirmed through consultation with Real Estate agents commenting that the combination of land availability and existing dwelling stock (most of which is around 30 years old) will ensure that the Greater Taree market will remain relatively affordable into the short to medium term.

Overall, while Greater Taree has a significant amount of land suitable and available for development, the issue, is not the actual supply of land, but rather the *location* of this land and new dwellings and its *ability to cater for the market demand* identified in the previous section of this report.

Consultation undertaken with local property agents for this study has indicated a number of further factors that are likely to influence future housing supply in Taree. (It is important to note that these findings are based on the current housing offer available in Taree. If there was to be a change in the type of housing offer available in Taree (eg, increase in density in particular) this may serve to change some of these key drivers). There is very little new supply of quality housing stock in high amenity locations close to the Taree city centre area.

Consultation with agents also indicated that new supply is likely to be dominated by retirement and aged care facilities. The supply of retirement and aged care facilities has been strong in the Mid-North Coast, with 665 dwellings across 25 projects entering the market during 2005 to 2006 and nearly 1,400 dwellings expected to come online over the next two years[7].

[7] Knight Frank (2007) NSW Coastal Regions Residential Market Overview

3.2.4 Implications and Potential Opportunities for Pitt Street Waterfront

Following is a summary of findings in this chapter:

- The site provides the opportunity to contribute to future population growth within an existing centre and to contribute to Taree's position as a Regional Centre (an identified objective in local and regional planning policy), by catering for the housing needs of the future population within an existing centre with potential to contribute to greater dwelling mix, including more multi-storey, unit style dwellings and opportunities for increased density.

- The dwelling projection scenarios tested within the *GTCC Local Growth Management Strategy, 2007* show that the Greater Taree LGA will need to cater for between 9,750 to 11,000 additional dwellings to 2031.

- SGS housing demand modelling shows that based on previous trends and the current availability of housing in the market, most demand for future housing in the wider LGA is likely to be for separate dwellings. However, consultation with agents has indicated that demand for separate houses is likely to shift as people become more exposed to a different housing offer – higher quality, higher density, new types of development and urban design outcomes, or offering variety in location, or availability of views.

Type of Residential Development

The findings of the broad residential market assessment suggest that the development should:

- **Fill a gap in the local housing market by providing a unique housing offer.** Higher density residential development in a high-amenity location and in close proximity to the services, retail and infrastructure available in Taree city centre is likely to attract strong demand.

- **Provide a mix of medium and high density housing to cater for downsizing households.** According to agents, 'higher-end' row, terrace or town houses would work well at the site. If higher density, i.e. 3 and 4 storey development, then must include lifts and internal access. 'Walk ups' will not work well in the Greater Taree community particularly in line with its increasingly ageing and retiree population. There is likely to be strong take-up of medium density (townhouse, terrace house) and more limited take-up of high density dwelling types (flats, units or apartments).

- **Cater for demand by local residents, as well as 'sea changers' and retirees.** Agent consultation has indicated that demand for small, low maintenance dwellings is likely to emanate primarily from the existing resident population.

- **Provide dwellings that are of high quality design and construction.** Considering that there is likely to be a mix of uses at the site, it is important that development at the site includes dwellings of high quality construction and design.

- **Provide 2 and 3 bedroom dwellings**. The number of bedrooms is important. Although key population trends indicate a continuing demand for smaller household types (agents commented that spare rooms to be used as a study or for guests are a key feature of the local market.

- **Provide space for private vehicles and/or structures that can double as storage.** Car dependence in coastal communities is a key factor ensuring that garages are essential for new housing developments.

- **Create a stable environment.** This is important as the majority of buyers are likely to be owner-occupiers. If prestige properties are offered at Pitt Street, it is expected that these will be absorbed by an owner-occupiers, as opposed to investors who would not be able to generate the return on rent necessary for feasibility.

Number and Pricing of Residential Units

The findings suggest that:

- There is likely to be strong take up of medium and high density dwellings at the site. By offering a unique product in the Taree market, have limited impact on demand for and affordability of larger, separate housing types in the LGA.

- If the broad drivers of demand outlined previously are achieved (considering the lack of housing choice currently available in the Taree City Centre, the high amenity of the subject site and the lack of competitive developments)[8] it is not unreasonable to expect the proposed development to contribute to between 50-70 medium and high density unit sales per year, over a two year period.

- The ‘price point’ for housing at the Pitt Street site needs to consider competitive development on the coast. Demand for housing in Taree is driven by its’ relative affordability. Agents commented that prices for residential development at the Pitt Street site could range anywhere from $450,000 to $650,000 for ‘higher end’ properties at the site.

[8] This will need to be revised when the number of dwellings at the rezoned land on the corner of Macquarie and Victoria Streets in Taree is known and if any similar developments are planned within the Taree City Centre area.

3.3 The Retail and Commercial Market Analysis

This section includes discussion on the retail and commercial (primarily office) market in Taree. The analysis that informed this discussion was based on a detailed analysis of recent Census data and the results of SGS's employment projections and floorspace modelling shown in Appendix A as well as consultation with retail and commercial real estate agents and the Taree Chamber of Commerce.

3.3.1 Current Economic Profile

Greater Taree LGA's economic profile has the following characteristics:

- **A low proportion of working-age residents.** The aging population has implications for the size of the region's workforce. In 2006, a low proportion of working aged adults resided in Taree, particularly those aged 19-39 years. There is likely to be a future need to attract younger working-age people to live in the LGA.

- **A growing labour force, but reported difficulties in attracting and retaining skilled staff.** Overall the workforce being attracted to the area is changing with more professionals, associate professionals and intermediate clerical staff in the labour force, despite this many businesses have difficulties attracting and retaining experienced, suitably skilled and qualified staff (HVRF 2005).

- **A high degree of employment self-containment**9. In 2001, Taree had a self containment rate of 83.22 percent. This rate of self containment was consistent with the Mid North Coast.

- **A greater degree of diversification than many other regional areas in New South Wales.** Industry diversification in the industrial base of any region acts as a safe guard against economic downturns impacting a particular industry.

- **The rising importance of the tertiary and service based sector (HVRF 2005)**[10]. This was illustrated through the very high proportion of residents employed in the retail trade (18.9 percent) and Health and Community Services (13.0 percent) in 2001[11]. Despite the growth in the tertiary sector, agriculture, forestry and fishing remain important to the local economy.

- **A growing retail trade sector.** This is likely to be driven in some part by the 'Sea changers' and retirees with disposable incomes who are moving into the area.

[9] Employment self-containment provides the proportion of employed persons who live and work within Greater Taree LGA.

[10] Hunter Valley Research Foundation (2005) *Greater Taree Economic Profile – Current Structure and Future Directions*

[11] This study was conducted prior to the release of 2006 Census data on Employment.

- **Growing employment in health and community services.** Employment in these industries has been growing consistently since 1991. Taree's ageing population is likely to continue to drive employment in this sector.

- **A growing small business and home-based business sector (HVRF 2005).**

3.3.2 Supply of Retail and Commercial Floorspace

Following is a summary of findings in relation to the supply of retail and commercial floorspace in Taree.

Taree city centre currently provides the highest level of retailing in the region, with the core retail precinct centred on Manning Street. As discussed in Section 2 of this report, planning and policy objectives seek to retain Taree's role in the region and to prevent out of centre development. As identified in the *Precinct 2B Open Space, Community and Retail Assessment* (Urbis JHD 2006), there five key retail components currently in Taree City Centre:

- **Taree City Centre** - 15,500 sqm of retail space, anchored by a Big W discount department store and a Woolworths Supermarket.
- **Manning Mall** – is an older style mall which is located directly opposite Taree City Centre. The centre is based on a Kmart DDS and Bi-Lo supermarket and contains around 10,000 sqm of retail floor space.
- **Manning Street** is the main retail street in Taree located between the two malls.
- **Victoria Street,** a mix of retail and other uses, reflecting its former role as the main commercial and retail strip in the town.
- **Pulteney Albert Streets** are more peripheral and include a range of independent retailers, large format showrooms, commercial and other non-retail uses. (Pulteney Street has the highest incidence of vacant shops in the town, in part reflecting its distance from the main retail core) (Urbis JHD 2006).

Further retail offer of relevance to the site includes:

- **Oxley Street, Chatham** – a district shopping centre located approximately 700m from the Pitt Street site. This centre primarily caters for the local suburban population, but includes a cinema complex located on the corner of Oxley and Milligian Streets.
- **The Farmers Markets** - At present the Taree Farmers Market is run from the PYCY on Commerce St in Taree on the 2nd Saturday of every month. The markets generally have 35 stallholders although the number fluctuates due to seasonality. Running for approximately 15 months, the markets have a strong customer base, with the organiser Gloria Hays, estimating that 1,000 customers frequent the markets every month. The markets in Taree as well as Forster experience considerable increases in patronage during holiday periods. Further information is available in Appendix A.

The *Draft Taree Conservation and Development Strategy 2005* identified that the current amount of land available for retail use is insufficient and there is a need to investigate the commercial centre to assess its adequacy in terms of mixed use, urban design and any potential for expansion or other retail opportunities. Consultation undertaken as part of the *2005 Greater Taree Economic Profile* (HVRF 2005) also identifies that there is a lack of suitably zoned land for further significant retail development close to the Taree CBD.

However, consultation for this study indicated that despite these concerns, the supply of retail space and offerings in Taree is growing, as indicated by the recent redevelopment of Woolworths, a large 13,000sqm Bunnings store (currently being considered for Development Approval) and supermarket chain Aldi signalling its intention to establish a Taree store.

As shown in Figure 16. commercial and retail rents in Taree range from $150-$200sqm/pa for commercial and between $300 and $900sqm/pa for retail space.

Figure 16. Commercial and Retail Rents, Taree, 2007

Commercial Office	
CBD Office Rents	$150-$220sqm/pa
Retail	
Shopping Centre New	$600-$900sqm/pa
Shopping Centre Older	$450-$750sqm/pa
Strip Retail	$300sqm/pa

Source: Consultation, Local Estate Agents 2007

3.3.3 Demand for Retail and Commercial Floorspace

This section of the report contains a review of likely future demand for floorspace in Greater Taree LGA. The results of SGS's estimates of future floorspace, based on employment growth for Greater Taree LGA, are summarised following. Further details are shown in Appendix A.

An additional 11,980 jobs are expected to be accommodated in Greater Taree between 2006 and 2031. Significant growth is expected in the Retail Trade; Accommodation, Cafes and Restaurants; and Health and Community Services industries. Employment in Manufacturing remains an important industry, yet growing at a much slower rate. Table 2 shows the breakdown of the employment forecasts into ABS 1 digit ANZSIC industry classifications, reported at five year intervals.

Table 2. Total Additional Employment by Industry from 2006, Greater Taree, 2007-2031

Total Additional Jobs by Industry (from 2006)	**2006***	**2011**	**2016**	**2021**	**2026**	**2031**
Agriculture, Forestry and Fishing	868	15	32	48	63	96
Mining	50	1	2	3	4	6
Manufacturing	1,784	146	308	470	632	790
Electricity, Gas & Water Supply	195	10	22	34	45	58
Construction	1,416	0	1	1	2	2
Wholesale Trade	521	20	42	64	86	111
Retail Trade	2,281	708	1,531	2,356	3,181	4,014
Accommodation, Cafes & Rest.	1,039	262	569	876	1,184	1,500
Transport & Storage	672	40	87	134	181	229
Communication Services	162	37	82	126	171	217
Finance & Insurance	254	100	222	344	467	592
Property & Business Services	247	37	84	130	177	228
Govt. Admin. & Defence	658	7	16	24	33	42
Education	1,258	148	318	488	659	839
Health & Community Services	2,256	353	758	1,164	1,570	2,006
Cultural & Recreational Services	204	51	111	171	231	293
Personal & Other Services	618	168	364	562	759	958
Total	**14,483**	**2,103**	**4,548**	**6,997**	**9,445**	**11,980**

Source: SGS Economics and Planning, 2007, ABS 2006 (*by place of enumeration)

Future demand for additional floorspace will be concentrated in the Retail Trade (158,208sqm), Manufacturing (29,298sqm), Transport and Storage (50,311sqm) and Accommodation, Cafes and Restaurants (43,491sqm). Table 3 outlines the projected additional floor space requirements. These projected additional floor space calculations are based on those industries for which benchmarks have been provided in Appendix B (Floorspace Assumptions).

Table 3. Total Additional Floor Space (sqm) by Industry from 2006, Greater Taree, 2007-2031

Total Additional Floorspace (sqm) by Industry (from 2006)	2011	2016	2021	2026	2031
Agriculture, Forestry and Fishing	0	0	0	0	0
Mining	0	0	0	0	0
Manufacturing	10,850	23,034	35,217	47,378	59,294
Electricity, Gas & Water Supply	1,185	2,606	4,030	5,453	6,916
Construction	59	130	200	271	341
Wholesale Trade	4,389	9,268	14,141	19,002	24,360
Retail Trade	27,869	60,339	92,869	125,389	158,208
Accommodation, Cafes & Rest.	7,594	16,492	25,412	34,330	43,491
Transport & Storage	8,829	19,166	29,513	39,843	50,311
Communication Services	4,430	9,793	15,173	20,553	26,066
Finance & Insurance	2,509	5,554	8,609	11,664	14,791
Property & Business Services	935	2,094	3,259	4,423	5,711
Govt. Admin. & Defence	247	547	847	1,147	1,453
Education	0	0	0	0	0
Health & Community Services	0	0	0	0	0
Cultural & Recreational Services	1,783	3,876	5,975	8,073	10,264
Personal & Other Services	4,861	10,567	16,286	22,004	27,785
Total	**75,541**	**163,465**	**251,531**	**339,530**	**428,991**

Source: SGS Economics and Planning, 2007

Drivers of Demand for Retail / Commercial

The following drivers of demand have been identified through consultation with local retail, commercial property agents and the local Chamber of Commerce. These trends are likely to impact on demand for additional floorspace in the future.

- **Continued population growth is likely to drive demand for additional retail floorspace**. Taree has seen significant demand recently from large chain retailers in recent years e.g. Bing Lee, Bunnings, Aldi etc. This has been driven by population growth both in Taree centre and the wider LGA over the next 20 years. Large retailers have identified that Taree will develop further as a regional service centre and given that there are currently few major retailers located in the town there is significant potential for growth.

- **There are opportunities to provide for more boutique retail offer**. The local and visitor market is increasingly demanding this yet there is currently little provision.

- **There is increasing interest in local produce from both consumers and local suppliers – for fresh, organic and gourmet food in particular**. Monthly produce markets are currently held in Taree. There are potential opportunities to establish a regular market.

- **There is a lack of quality restaurants and cafes in Taree that cater for both local and visitor populations**. There is demand for more and better quality eateries/restaurants in Taree. Local cafes and restaurants currently located in the Taree town centre are seen to have been slow to respond to consumer demand for a higher quality offer. However, due to the socio-economic profile of the region, demand for the current offer is likely to remain.

- **There is demand for quality commercial office space in Taree**. Currently A and B grade office space is at a premium with very low vacancy and high demand. There is sufficient C grade stock. There is little large scale commercial office space available and there has been little new stock placed out to the market.

- **There has been a significant increase in home based and Small and Medium Enterprise businesses**, which is expected to increase the demand for business services and support such as serviced offices and potentially a business centre. This demand is further increased by the growing number of professionals (architects, builders and also visiting doctors etc) who visit the town two to three days per week and require office space during that time.

3.3.4 Implications and Potential Opportunities for Pitt Street Waterfront

This broad commercial and retail market analysis has uncovered a number of implications and potential opportunities for the redevelopment of the Pitt Street waterfront site. Key opportunities are as follows:

- **It is important that the site provides a 'unique' offer that does not negatively impact on retailing in the CBD**. Consultation has indicated that Taree lacks boutique retailing and concerns have been raised over the available supply of commercial/retail floorspace, particularly within the Taree CBD. The nature of the site as a defined precinct, and the desire to establish a point of difference for the site provides an opportunity to encourage local boutique retailing. This could capitalise on both the local, regional and visitor markets. Consultation has suggested that the increase in sea-changer and retiree residents in the wider region has, and will continue to boost the demand for high quality services and products in line with greater disposable incomes.

- **The current site offer should be incorporated into the design of the site**. The Pitt Street waterfront site currently has a number of commercial/retail land uses on the site which have the potential to improve and capitalised on. The Fisherman's Coop could be integrated (in its current or a new position) into the redevelopment of the site.

- **The site presents an opportunity to capitalise on the growth of home based and small businesses in the area**. Anecdotal evidence suggests that there has been growth in home based businesses and there is an expectation that this will continue. There are opportunities for the site to capitalise on this either through the provision of service offices and small consulting rooms within an active retail/commercial precinct or through dwellings with home offices which have separate access. Consultation with commercial agents has indicated that there is increased demand for small, high quality office suites.

- **The site presents an opportunity to capitalise on demand for high end restaurant/tavern.** The site provides the opportunity to fill the gap for high quality restaurant or tavern offering in Taree. This would require integration with either the marina or the retail precinct in order to be attractive.

- **The site presents an opportunity to capitalise on the growing demand for quality food produce by locating a farmers market on the site offers opportunities to capitalise upon the growing food and wine reputation of the region**. Consultation has indicated that there is high quality produce available in the area and this could be a key attraction, as well as benefit the local community. Markets could have connections with a restaurant on the site serving locally grown produce etc and links with the Fish Coop are possible. In order to attract a wider range of producers, a wider variety of facilities, such as cold storage, power etc would need to be provided at the site. Port Macquarie Hastings Council ran the very successful markets at Wauchope though their Economic Development section, and there is the opportunity for GTCC to take ownership of any markets situated on the study site.

3.4 Tourism and Leisure Market Analysis

The tourism and leisure market analysis discussed below was informed through a detailed analysis of recent National Visitor Survey data (Tourism NSW and Council of Tourist Associations) as well as consultation with key local informants, including GTCC Council Officers. Further detail relating to this analysis is shown in Appendix A. Within this analysis, 'tourism and leisure' includes both holiday and business visitors to Taree, leisure and entertainment-related activities including river-based events, tourist accommodation (including Taree's hotel and motel offer). Opportunities in relation to open space and public recreation were discussed in Section 2.

3.4.1 Profile of the Current Tourism and Leisure Market

Taree's current tourism and leisure market can be characterised noting the following:

- **Tourism is an important industry for the local economy**. Tourism expenditure in Taree makes up 8.4% of total regional expenditure. Domestic visitors injected an average of $140 million into the local economy annually in 2005. Domestic day trip visitors spent $108 on average per person and overnight visitors spent $104 on average per visitor night (Council of Tourist Associations 2005). This compares with an overall tourism expenditure of $1.665 billion for the North Coast Region for the year ending December 2005.

- **Taree is generally seen as a service centre rather than a tourism destination**. Although the Manning Valley and Mid-North Coast generally has a range of natural and built attractions which has made the area an attractive tourist destination, the city of Taree is generally regarded as a regional service centre rather than a tourist destination.

- **The Taree tourism market is a segmented between holiday destination stays and Taree City Centre stays.** The market is split between:
  - i) *Holiday Destination Stays* - Coastal and Hinterland travel driven by environmental attractions;
  - ii) *Taree City Centre Stays* - Visitation to Taree City Centre is largely driven by attendance at events on the river and in the town, business travel and short-term road travel stay (overnight stay between destinations).

- **Visitors to Taree are predominantly from NSW**. Visitation to Taree LGA is characterised by intra-regional and intra-state travel. On average from 1998 to 2005, 47% of overnight visitors were from Sydney, 41% from other areas of NSW and the remaining 12% originated in other states. In contrast, for the same period, only 14% of domestic day visitors originated from Sydney, and 86% originated from other areas of NSW.

- **Taree captures a relatively small percentage of the region's visitors**. Taree LGA had 452,000 domestic day visitors and 341,000 domestic overnight visitors in 2006 which represents 11.8% of all visitors to the North Coast Region. These overnight visitors spent 693,000 nights in Taree.

- **Overall, multiple night stays are dominant**. According to Tourism NSW (2007), overnight domestic visitation to Taree is characterised by stays of two nights or longer. Between 1999 and 2004, 29% of visitors stayed in the Taree LGA for two nights, 15% stayed for 3 nights and 26% of domestic visitors stayed for between 4 and 14 nights.

- **'Holiday and leisure' and 'visiting friends and relatives' dominate reasons for travel to Taree.** For domestic overnight trips the majority of trips were for holiday and leisure (41%), visiting friends and relatives (40%), and for business (12%). Domestic daytrip visitation was characterised by holiday and leisure seekers (56%) rather than those visiting family and friends (26%). Business travellers were more likely to stay overnight (12%) than stay for the day (8%).

- **Domestic self drive and leisure travellers are target markets for the region**. The *Mid North Coast Tourism Board's Marketing Plan 2007-2009* (MNCTB 2007) identifies the domestic self drive and leisure target markets as having the highest representation and as the base of the Mid North Coast tourism dollar.

- **Families and retirees are the dominant visitor types**. The *Taree Economic Profile 2005* (HVRF 2005) notes that the region's tourist market is primarily families with children and retirees travelling with caravans and campervans ('grey nomads'). These tourist markets, particularly families are affected by seasonality.

- **The majority of visitors stay with friends and relatives**. 45% of domestic visitors stay at friends or relatives property. This is followed by hotel, resort, motel or motor inns (30%) and caravan and holiday park style accommodation (12%).

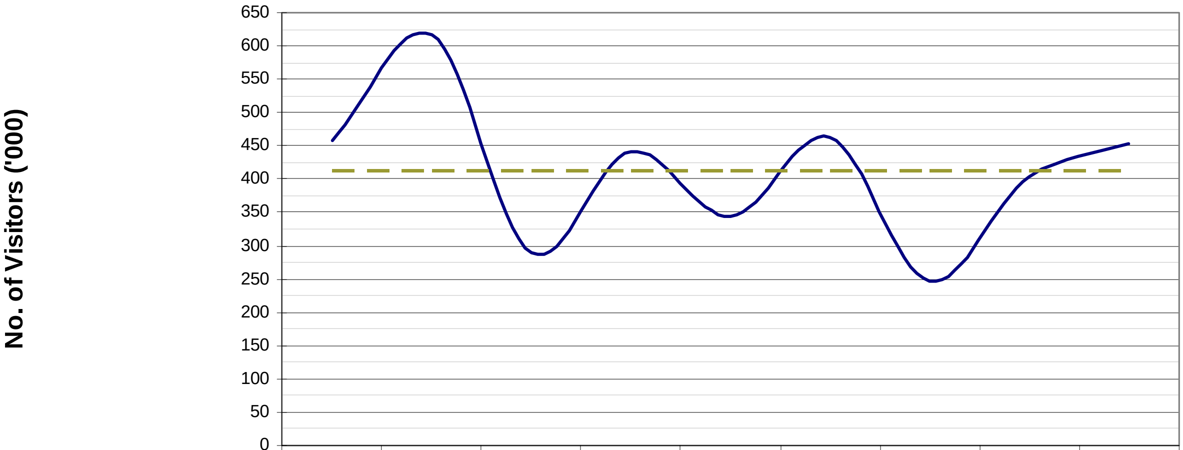
- **The conference and MICE (Meeting, Incentive, Convention, Exhibition) market is becoming increasingly important for tourism in NSW**. Although not a major target market for the Mid North Coast due to the prohibitive size of the venues required, the Mid North Coast Tourism Board (MNCTB 2007) notes that the potential of the MICE industry in the short term, lies not in huge conferences and exhibitions but in those ideally suited to up to 200 delegates and partners.

3.4.2 Demand for Tourism and Leisure Facilities

This section of the report contains a review of likely future demand by the tourism and leisure market in Greater Taree LGA.

Although experiencing some fluctuation, there was no identifiable trend in the number of day trip and overnight visitors to Greater Taree LGA during the period 1998 and 2006 (Figure 17 and Figure 18). Over the period, there has been an average of 407,000 domestic day trip visitors per year, 228,000 overnight visitors (including 874,000 visitor nights) per year. Consultation and national domestic tourism forecasts indicate that domestic tourism figures for Greater Taree LGA are unlikely to grow significantly, however this is somewhat dependent on the success of regional and local tourism marketing programs, wider domestic and international trends and effects.

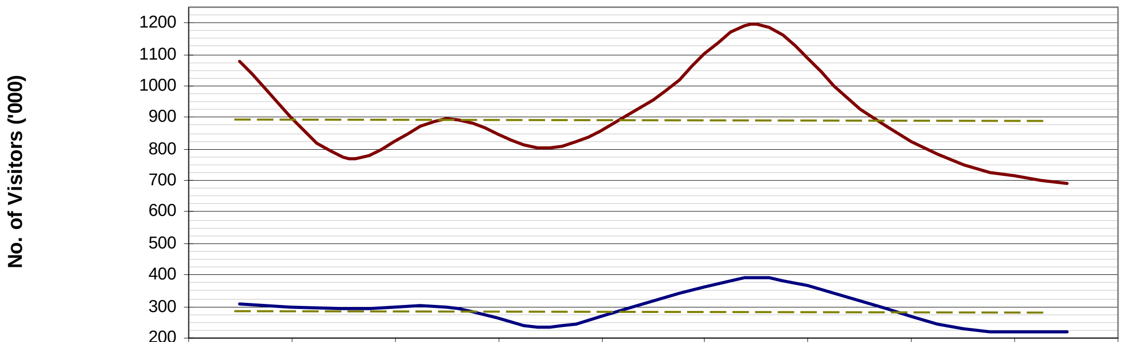
Figure 17. Day Trip Visitors, Greater Taree LGA, 1998-2006



	1998	1999	2000	2001	2002	2003	2004	2005	2006
DayTrip Visitors	459	617	290	442	343	463	247	403	452
Average (1998-2006)	413	413	413	413	413	413	413	413	413

Source: Tourism Research Australia 2007, SGS.

Figure 18. Overnight Visitors and Visitor Nights 1998-2006



	1998	1999	2000	2001	2002	2003	2004	2005	2006
Visitors	309	292	299	233	318	393	316	230	221
Visitor Nights	1079	774	895	803	958	1196	925	748	693

Average (1998-2006)

Source: Tourism Research Australia 2007, SGS.

The total economic value of domestic tourism in Australia is expected to increase at a faster rate than the number of domestic visitor nights due to increased expenditure on accommodation (MNCTB 2007). An increase in per night expenditure has been witnessed in the North Coast region over the past 3 years, increasing from $104 per night for the year ending December 2004 to $139 for the year ending March 2007 (Tourism NSW 2005, 2007). Consultation with the Mid North Coast Tourism Board indicates that this increase is expected to continue, especially as low cost airlines become more prominent in the north coast market. It is important to note however that the style and cost of accommodation and retail offering in Taree will affect the ability of the LGA to capitalise upon this trend of increasing expenditure.

3.4.3 Supply of Tourism and Leisure Facilities

Following is a summary of findings in relation to the supply to Taree's tourism and leisure market.

The Manning River - The Manning River is one of Taree's key assets but while there are a number of water-based or water-oriented experiences available (river cruises, sailing, canoeing etc) it has been highlighted in a number of reports that river access and usage is under-utilised - including the general view that the town centre has 'turned its back' on the river rather than capitalised on it. Consultation has indicated that much of the river bank abuts private farming land which has limited public access to the river. There are a limited number of public boat ramps which provide access for both power boats and smaller crafts such as canoes and kayaks.

As noted in Section 2, the *Greater Taree Strategic Plan Vision 2020* highlights concern over lack of public access to the Manning River and surrounds. Core objectives for the plan include preparing and implementing plans for land and water based activities and waterfront facilities, developing tourism potential as well as passive and active recreation interests, promoting the provision of boating access and related facilities and encouraging the provision of tourism, recreation and commercial facilities in proximity to population centres.

Coocumbac Island Nature Reserve - Located in the Manning River immediately upstream of the Martin Bridge and is adjacent to the city of Taree. Despite this proximity, it is estimated that less than 500 people visit the reserve each year (NSW National Parks and Wildlife Services 2003). There are few other publicly accessible areas of high recreation or amenity value located along the river. An important consideration for the site includes increasing boat-based travel along the Manning River.

The Manning Entertainment Centre – The only Entertainment Centre on the Mid-North Coast, the Manning Entertainment Centre (located in close proximity to the Pitt Street site) offers the largest performing arts facilities in the region. The Centre is located adjacent to the Manning Valley Visitor Information Centre, approximately 500m east of the Pitt St Waterfront. The Centre auditorium has a seating capacity of 505 persons (the full bar and kiosk facilities can accommodate up to 200 persons). It was reported through consultation that major events are hosted at the Manning Entertainment Centre and attract a significant regional audience.

Local Art Galleries and Museums - There are a number of art galleries located in the Greater Taree LGA. Greater Taree City Council owns and operates the Manning Regional Art Gallery. Located in Taree Town Centre, the Gallery is committed to curating more than 12 exhibitions each year. There is a strong local Indigenous Arts community in Taree. In 2004 the Manning Regional Art Gallery began the Aboriginal Traditional Art Revival project, which includes the research and identification of appropriate local Indigenous artefacts for collection, as well as an oral and photographic history research of over 20 local Elders. In addition there are two craft centres and an Arts and Crafts Gallery in Taree Town Centre. Art galleries are also located at Tinonee, Diamond Beach and Wingham. The Greater Taree City Council Strategic Plan has identified the potential for a Maritime Museum to be established in the town. Community Arts Centres and Museums are further discussed in the following community infrastructure assessment.

Manning River-Based Events - Rowing is an important driver of tourism to Taree. As noted in Section 2, the Manning River is one of two straight rowing courses in the state, leading Taree to host regional and NSW Rowing Association regattas in addition to other powerboat competitions. The 2000m rowing course is located immediately adjacent to the Pitt St Waterfront Precinct site and as a result has the potential to be integrated with the proposed development. In addition to rowing and powerboat events, the river hosts sailing, fishing, waterskiing events. There is reported to be few formal vantage points for large crowds to view river-based events.

Regional Sporting Events – Taree's sporting facilities play an important role in Taree's leisure and tourism offer. A number of regional sporting events are held throughout the year, with key facilities including the Taree Recreational Grounds which incorporate the Manning Aquatic Leisure Centre.

Transport infrastructure - Good transport infrastructure is a vital component of successful tourism development. As discussed in Section 2, Taree is located on the main north-south driving route along the east coast of NSW and is seen to be served by good highway infrastructure after recent upgrades. This allows Taree to capitalise upon both destination tourists and also those tourists driving along the east coast. Taree is also well serviced in terms of airport infrastructure and is serviced by regular flights for day-return business and leisure travel.

Conference Facilities - Consultation for this Economic and Social Assessment indicated that Taree does not currently have facilities or appropriate services to cater for the current market but the possibility of developing a conference centre which might also cater for the local functions (such as wedding receptions etc) in the Town Centre has been raised in the past but is yet to come to fruition. It was suggested through consultation that there is sufficient demand from both conferences and local based functions to justify the provision of such a facility in the Taree town centre area. It is vital however that this is provided in conjunction with a quality accommodation offer that has the capacity to accommodate delegates.

Accommodation - A range of accommodation options are currently available in the Taree region including Backpacker and Holiday park accommodation, 3 star motels and an increasing number of bed and breakfast and country retreat style accommodation. According to information held by GTCC, there were 25 accommodation providers in Taree and a further 81 in the LGA. According to the ABS Tourism Statistics, this included 10 hotels or motels with 5-14 rooms, 21 hotels or motels with 15 and over rooms and 12 caravan and holiday parks (ABS 2006). The remainder consists of cottages and apartments that are available for rent or other establishments with less than 5 rooms.

Both the *Manning Valley Tourism Business Plan* and recent consultation with the GTCC Tourism Manager and agents indicates however that there is a lack of higher end accommodation options, despite increased demand. This is further shown through an analysis of current accommodation providers in the region. There is no accommodation of any type (hotel, motel, bed and breakfast, apartments etc) over 3 stars in Taree, and only a small number in the wider region. As identified by the GTCC Tourism Manager (pers. comm.), a key concern for accommodation provision in Taree is that motels haven't partaken in ongoing to maintenance, unlike in some of the surrounding areas such as Wingham where proprietors have been active in maintaining and improving their offer. This has allowed these accommodation providers to target business people as Taree cannot cater for the business traveller.

As suggested in the *Taree Economic Profile* (HVRF 2005), this lack of quality accommodation impedes Taree's ability to attract a range of visitors and tourists and may also be a seen as a hindrance to attracting more overnight business travellers who expect a higher standard of accommodation and service. Anecdotal evidence obtained through consultation for this study indicates that people who travel to Taree for business are staying in Forster, Old Bar and Port Macquarie because of the lack of quality accommodation and restaurants in Taree.

The *Manning Valley Tourism Business Plan* (2005) and consultation for this study have identified a number of key gaps in the current tourism and leisure offer in Taree. These are summarised as follows:

- Lack of variety of accommodation
- A lack of positive corporate and destination identity
- Inconsistent standard of hospitality/attitude of operators across all sectors
- Gaps in certain accommodation types, i.e. 4 star + motel for Taree
- Lack of awareness of the Manning Valley by domestic and international visitors
- Lack of built attractions and organised activities
- Lack of conference facilities
- Lack in quantity and inconsistent quality of cafes and restaurants
- Poor first impression of the area at gateway entry points
- Poor strategic location of the Visitor Information Centre
- Less affordable airfares than other centres

As discussed above, the core tourist market for Taree is affected by seasonality. Research suggests that Taree should therefore look to supply a tourism offer that does not rely heavily on activities available at specific times of the year and therefore boost overall tourism dollar contribution throughout the year (MNCTB 2007). As such, Taree should look to grow the following tourist markets:

- Special interest markets and wanderers (who predominately head north for winter but generally do not make travel decisions based on seasons);
- Nature based tourism
- Wine and food tourism;
- Event and conference based travel;
- Indigenous tourism experiences (MNCTB 2007).

Consultation for this study indicated that Taree needs a 'hook' to draw tourists to the town. Other towns within the LGA (particularly coastal) are seen to have natural attractions that give them an edge. Taree is seen as a 'regional' service centre and is seen to lack this appeal. However this is changing, as new people move into the area, changing the demographics and dynamic of the town and region, are seen to be lifting the quality of the products and services available. There has been a morale boost in the town over the last few years, with residents feeling more positive about what the town has to offer.

3.4.4 Implications and Potential Opportunities for Pitt Street Waterfront

This broad tourism and leisure market analysis has uncovered a number of implications and potential opportunities the redevelopment of the Pitt Street waterfront site. Key opportunities are as follows:

- **An opportunity to create a gateway site**. The location of the Pitt Street precinct on the route between Taree city and airport presents an opportunity to develop a gateway site. The location of the current Ford car yard and Big Oyster is particularly important given its high exposure and redevelopment of this site should be seen as a gateway to both city and the development. The site also presents opportunities to connect the city to the waterfront and public open space by way of a cycleway.

- **An opportunity to contribute to diversified tourism and leisure offer**. A key concern highlighted in consultation was the lack of a positive destination or corporate identity for the town. This site has the potential to present a diversified and unique tourism and leisure offer and assist in Taree's marketing as destination, further integrating it with wider regional marketing. Development on the site must establish a point of difference. As discussed, Taree lacks a quality accommodation and restaurant café offer which hinders its ability to tap into the business travel market reduces its ability to encourage greater tourism expenditure. The site has the potential to incorporate these uses, thereby widening its potential target market. Given tourism to Taree is largely event and drive through driven, having a unique restaurant, open space and retail offer could assist in value adding to the experience of these visitors and potentially encourage return visitation.

- **An opportunity to capitalise on the river location.** The Manning River is a key element of Taree's attraction to visitors that is yet to realise its full potential. The Pitt Street Waterfront Precinct offers the best opportunity available in the immediate area to develop an active waterfront incorporating public open space and commercial uses. It is very important however that development on the site is not purely aimed towards attracting tourists, but first and foremost a precinct for the wider community. The site also has the potential to improve access for leisure boating activities for both tourists and residents, to improve the experience of visitors to Taree by creating access and vantage points to view events on the Manning River and to cater for visitors to Taree for these events. However development of a marina at the site needs to be combined with a wider strategy aimed at improving 'the boating' experience on the Manning River (eg, through the provision of picnic areas along the river, growing a houseboat industry if appropriate etc).

- **An opportunity to provide a river based attraction**. The site has significant potential for a major river based attraction such as a maritime museum and/or an indigenous cultural centre. The viability of such an attraction however would hinge upon its relevance to the local community as well as its ability to attract external visitors. Associated commercial and retail uses such as a restaurant/tavern, marina, canoe and other boat hire would be beneficial. There is an opportunity for the site to develop as a leisure precinct with links to the CBD through the proposed cycleway and significantly increase the exposure of the river amongst residents and visitors.

- **An opportunity to contribute to Taree's attraction as a destination** and assist with changing the overall perception of the town from that of a regional service centre. This emphasises the need to ensure that the site utilises its position on the river and that the community and visitors to Taree have access to the area.

- **Potential to contribute to a year-round tourist offer**. Given that a core segment of Taree's tourism is driven by attendance at events or business travel; food and wine experiences, visiting galleries and museums and shopping there is strong potential for the site to build on these attractions and contribute to a year-round tourist offer in Taree.

- **Potential to provide a hotel and with flexible conference, meeting/function room facilities**. The greatest concern to all stakeholders consulted with respect to tourism is the lack of quality hotel and conference facilities available in Taree. The site has the potential to accommodate a hotel with small conference facilities where the car yard and big oyster is currently located. This would optimise site exposure as well as river views. It is expected that a hotel would further encourage vibrancy in the precinct. It is accepted that such a facility may impact upon other accommodation providers, however it is believed the competition will assist in the development of the accommodation market and encourage other providers to improve their product. Further, such a facility has the potential to attract clients who currently do not stay in Taree. Further investigation as to whether the rezoned site on the corner of Macquarie and Victoria Streets in Taree City Centre is to provide such facilities is required.

- **An opportunity to strengthen links between the riverfront and other leisure, tourism and entertainment facilities in Taree**. For example, providing a link between a hotel and conference facilities at the 'Big Oyster' site would link to the Taree entertainment centre. Relocation of the Visitor's Centre and provision of a shop-front for local tourism operators.

3.5 Community Infrastructure Analysis

The following community infrastructure analysis was informed through consultation with GTCC officers, and a detailed analysis of recent Census data and the application of SGS's Social Infrastructure Guidelines, 2006. The opportunities identified in Section 2, relating to open space and heritage also relate to this analysis.

3.5.1 Supply of Community Infrastructure

Current community infrastructure available in Taree is characterised as follows:

- **Taree town centre area is serviced by a range of community facilities and services.** Taree and Wingham contain the majority of community infrastructure due to Taree's role as a regional centre and the geographic isolation of many townships throughout the LGA.

- **Taree is particularly well serviced by health-related services.** Medical centres, the Manning Rural Referral Hospital (166 beds) and a private hospital, a major community health centre and Aboriginal health centre are located in Taree. The district TAFE facility, central library and regional art gallery and performing arts facility are also located in Taree.

- **Taree is serviced by an increasing number of aged care services and facilities,** although a lack respite services has been noted (Community Plan 2005-2009).

- **There is very high provision of community meeting spaces in Taree (local town and village halls).** Consultation GTCC suggested that although these halls play an important role in their respective communities, there is no need for any more as larger centralised centres which are able to provide programs and services are better aligned with the strategic planning of major agencies and Council. As with community halls, there are a large number of primary schools to service the widely distributed population.

A detailed list of current community facilities in Taree is set out in Table 4.

Table 4. Community Facilities, Taree LGA 2007

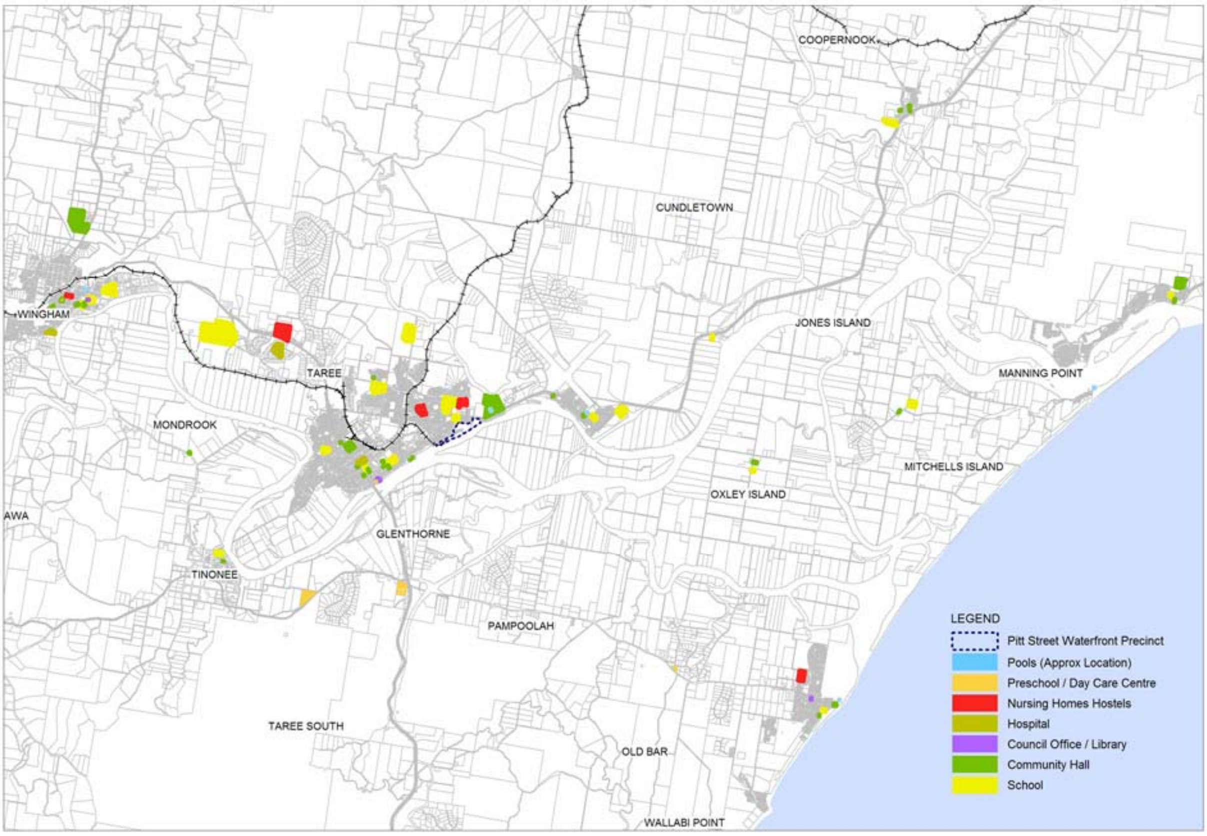
Level	Facility	LGA
Local	Community Meeting Centre/Hall	25
	Childcare Centre	13
	Preschool	11
	Primary School	32
District	Multi-purpose Community Centre/Civic Centre	
	High School	6
	Youth Facility/Service	1
	Branch Library	1
	Aged Care Service/Respite Centre	13
	Community Health Centre	2
	Police	4
	Fire & Rescue	3
	Ambulance	1
	State Emergency Service (SES)	4
Whole of LGA	Art Gallery	1
	Museum	
	Performing Arts/Exhibition/Convention Centre	1
	Central Library	1
	Hospital - Public	2
	TAFE District Facility	1
TOTAL		**122**

(The Community Facilities shown in this table are defined in Appendix C).

As noted above, community facilities are predominantly located in the Taree and Wingham with a smaller number scattered in the smaller towns and villages throughout the LGA. The site is well serviced by community services and facilities. Figure 19 below shows the location of some core community facilities[12] in the Greater Taree LGA relative to the Pitt St site. As shown in Figure 9 (Section 2 of this report), the site is also in close proximity to public open space.

[12] This includes Preschools and Child Care Centres, Nursing Homes, Hospitals, Libraries, Community Halls and Schools

Figure 19. Community Facilities Greater Taree LGA



Source: GIS Layers supplied by GTCC, SGS Economics and Planning

3.5.2 Demand for Community Infrastructure

This section of the report contains a review of likely future demand for community infrastructure in Greater Taree LGA. The Standard of Services used in the following gap analysis (Benchmarks) have been derived from the *Queensland Social Infrastructure Guidelines 2006* developed by SGS in conjunction with other experts. Every effort has been made to utilise benchmarks that are relevant to the NSW or Greater Taree LGA context, for example High Schools and Primary Schools are both reflective of the NSW context. These benchmarks are shown in Appendix C.

By applying the benchmarks for community facilities to the projected population, and taking existing community facilities into account, the number of community facilities required in the locality was calculated for the medium-term planning horizon to 2016. The *GTCC Local Growth Management Strategy, 2007* that Greater Taree is likely to experience 21 percent growth in population, an increase of 9,459 people over the medium term (the 10 years to 2016) (refer to Appendix C).

Figure 20. Additional Community Facilities Required (2007-2016)

Level	Community Facility	Benchmark for Provision (minimum # per population)	Total Needs at 2016	Current Needs 2007	Additional Needs Required (Net of Existing Facilities) 2007 - 2016
Local	Community Meeting Room/Multi-purpose hall	6000	9	25	
	Childcare Centre	4000	14	13	1
	Preschool	7500	7	11	
	Primary School	4500	12	32	
District	Multi-purpose Community Centre/Civic Centre	20000	3		3
	High School	14000	4	6	
	Youth Facility/Service	20000	3	1	1
	Branch Library	15000	4	1	3
	Aged Care Service/Respite Centre	20000	3	13	
	Community Health Centre	20000	3	2	
	Police	20000	3	4	
	Fire & Rescue	25000	2	3	
	Ambulance	25000	2	1	1
	State Emergency Service (SES)	25000	2	4	
Whole of Council	Art Gallery	100000	1	1	
	Museum	100000	1		1
	Performing Arts/Exhibition/Convention Centre	100000	1	1	
	Central Library	30000	1	1	
	Hospital - Public	150000	1	2	
	TAFE District Facility	150000	1	1	

Gaps in current service provision have been identified using the broad analysis above and through consultation with key stakeholders. Overall, there are few current gaps in service provision, particularly at a local level. However, additional facilities required in Taree, as identified through the analysis includes a childcare centre, multipurpose community / civic centre, youth facility/service, ambulance, branch libraries and a museum. Demand for community infrastructure is discussed in further detail below.

- **Multipurpose Community Centre / Civic Centre -** There is currently a need for at least two multi-purpose community centres at a district level. As identified in consultation (Laura Black pers comm. 19th October), three such facilities are currently in the planning or construction phase in the towns of Harrington, Old Bar and Hallidays Point all of which will incorporate a branch library, some meeting rooms and office space. There remains however considerable need for a regional community centre located in Taree. At present there is a youth centre, senior citizens centre and a church run centre, however according to the community services manager at GTCC (Laura Black pers comm. 19th October), and a centre which provides services for all members of the community is needed. Such a facility would be a ‘one stop shop’ and given the nature of Taree as a Regional Service Centre, this type of facility is vital.
- **Youth Service -** According to the Community Facilities Benchmarks, there is need for an additional youth centre or service. Consultation with Council however has indicated that youth services provision has improved and consolidated over the last year, with Council youth officers located at the PCYC. Better services and activities have led to a rise in usage and there is sufficient capacity to expand this facility as necessary rather than providing an additional facility. Consultation indicated that if a multipurpose community centre was to be provided in Taree centre, some level of youth services and support could be provided there to ensure sufficient provision into the future.

- **Branch Library –** Although the benchmarking analysis has identified a gap in the provision of branch libraries, the Council is currently in the process of establishing an additional three branch libraries in the planned multipurpose community centres at Harrington, Hallidays Point and Old Bar. In addition, the central library has recently undergone redevelopment and expanded its capacity. This will provide sufficient services for the current and future population.
- **Childcare Centre –** There will be a need for an additional childcare centre to support the future population, however it should be noted that there are an additional five pre-schools above minimum suggested standards located in the Greater Taree LGA.
- **Museum –** The benchmarking analysis indicates there will be a need for a regional (whole of shire) level museum by 2016. Currently there is small district museum at Wingham, but no regional museum, similar to the Manning Valley Regional Art Gallery. Consultation indicated that there would be demand for such a facility as long as it was relevant to the local population. It was suggested that an appropriate focus for the museum would be either maritime or indigenous. It should be noted however that there is the Mid North Coast Maritime Museum located in Port Macquarie.
- **Community Arts Centre –** Although not identified in the benchmarking analysis, the Community Services Manager at Greater Taree Council indicated that there is increasing demand for a community/indigenous arts centre. There is need for a space for professional and budding artists to work and there is the potential to incorporate a commercial component so that local artists have an opportunity to exhibit work for the general public.
- **Aged care services / Respite care services.** The broad benchmark analysis indicated the need for additional aged care / respite care facilities within the LGA. As indicated in Figure 19, a number of such facilities are currently located in the LGA. In addition, the development of a 230 dwelling / 100 bed retirement village and aged care facility is currently proposed at Old Bar (ERM 2007, information provided by Taree City Council). Given the unique offer of the Pitt Street site, it is not considered to be an appropriate opportunity for the location for such facilities.
- **TAFE / University Education Facilities**. The community benchmarking analysis indicates continued demand for the existing TAFE facility in Taree LGA to 2016. Analysis carried out for this study did not indicate the expressed need for an additional University Facility to be located within the LGA, or at the site. Such a possibility would need to be explored as part of a more detailed analysis which looks at regional demand in addition to potential local impacts[13].

[13] Such a study should include consideration of the location of other existing regional university campuses and their student catchment (local and international students), the courses / specialisations currently on offer at existing institutions and gaps in provision, the potential student population in the wider region and immediate area, the availability of student accommodation. Local implications of the development at the site should also be considered, including potential impacts on the growth and re-development of Taree in line with the NSW Department of Planning's objectives for it to develop as a major regional centre.

3.5.3 Implications and Potential Opportunities for Pitt Street Waterfront

Given the location of the site away from the CBD it is not appropriate to locate core or essential community facilities or services on the site, rather the site should incorporate uses which attract members of the community and visitors and provide facilities which are unavailable elsewhere. Consultation has identified a number of potential opportunities for Pitt Street Waterfront as outlined below:

- **Indigenous Cultural and Arts Centre –** Consultation with the Community Services Manager at GTCC highlighted the lack of any facility which celebrates the Indigenous culture of the local area and surrounding region. With 4.3% of the Greater Taree population being of Aboriginal Torres Strait Island descent, a centre of this nature would have relevance to both the local population as well as providing a key attractor for the site. There are opportunities for such a facility to incorporate a museum and cultural awareness component, a commercial gallery and studio space for local artists in Pitt Street.
- **Museum –** The lack of a regional scale museum in Greater Taree and the wider region provides an opportunity for the site. In addition to identifying the need for an indigenous cultural centre, consultation also noted that there was an interest within council and the wider community for a Maritime themed museum. Given the existence of a Maritime Museum at Port Macquarie, it is recommended that a museum at the site is not limited to this theme.
- **Community Arts Centre –** The opportunity exists for a community arts centre to be located at the site. It is important however that any facility incorporates a commercial component to assist in attracting people to the site and establishing a point of difference. It was recommended by Laura Black (pers. comm. 19th Oct 2007), that a centre on this site would need to be oriented towards fine arts or other specialist uses to complement other activities and facilities at the site. This could potentially involve regional arts classes or have some link with TAFE.

The following opportunities were also identified in relation to Community Infrastructure through the analysis undertaken in Section 2.

- **Equitable access to public open space.** An opportunity to provide for equitable access to public open space at the Manning River foreshore for locals and visitors.
- **Diversity and quality of open space and facilities.** Potential to provide bbq facilities, children's playground etc.
- **Include links between the surrounding residential area and the Taree City Centre** through walking and cycling and appropriate and reliable public transport services (eg, a shuttle service).
- **Provide health and fitness opportunities.** An opportunity to provide high quality walking, cycling and wheelchair paths along the foreshore area.

4 Comparable Case Studies

To compliment the market analyses presented thus far, five marina developments that are similar in aim to the 'vision' for the Pitt Street Waterfront redevelopment were documented. The market analyses presented thus far is largely based on the existing situation. The comparative case studies have been used to inform other possibilities at the site. These developments were researched via desktop research and interviews with experienced marina developers.

Details relating to the following marina developments are documented in this chapter:

- The Marina, Hindmarsh Island, South Australia;
- Harrington Waters, NSW;
- Shellcove, Illawarra, NSW;
- Honeysuckle Development, Newcastle, NSW;
- Mildura Marina, Mildura, NSW.

Consultation informed the selection of the case studies shown above, and informed the findings of this chapter. To ensure relevance to the Pitt Street site, the comparable developments selected included a mix of:

- Commercial marinas with associated mixed use development (including residential, retail / commercial and public open space);
- River-based as well as coastal development;
- 'Out of centre' developments in a regional location.

This chapter aims to provide an insight into the typical breakdown of related land use, the relationship between different land use at the site, and timing / staging of development with key characteristics of the comparable development and 'lessons learnt' and key success criterion documented below.

4.1 The Case Studies

The following case studies were documented to provide insights into how commercial marinas are being developed, particularly in terms of the mix of development at the site, the location and integration of different land uses at the site and the staging of development.

The Marina, Hindmarsh Island, (SA) is a mixed use, Marina, residential and tourism oriented development located approximately an hours drive south of Adelaide, close to the mouth of the Murray River. Land use around the Marina includes a mix of retail, recreational and service facilities and a waterfront tavern. The residential component includes waterfront lots and terraces which are available in a mix of 'land only' and 'house and land' packages. *Club Marina Holidays* provides self contained 4.5 star villa accommodation which is incorporated into to the residential component.

Harrington Waters, NSW

Adjacent to a national park, Harrington Waters is a master planned development at the mouth of the Manning River, 20 minutes drive from Taree and 45 minutes drive from Forster or Port Macquarie. The development incorporates a significant residential component and two retail and recreational precincts. Currently there is a 20 berth marina that has a planned expansion and is collocated with the Harbour Village, which contains marine and boutique retail. Connected to the Marina and retail precinct via a cycleway and road is the Tavern, Lodge and Resort complex. A shopping centre with specialty shops, Coles and a Community centre is currently under construction and will be easily accessible to the Marina.

Shell Cove, located south of Wollongong in the Illawarra region, is a joint venture between Shellharbour City Council and Australand to develop a major residential/tourist complex. The marina development will incorporate a mix of uses including residential dwellings, community facilities and boat harbour precinct with a 150 room hotel. This precinct will include both retail and commercial uses and cater for the incoming population and visitors to the Marina. Residential development will be focused around the boat harbour precinct and marina, with approximately 1,000 dwellings planned around the harbour. The Marina will have approximately 300 berths and have associated marine services such a chandlery, fuelling and pump station and marine maintenance services.

Honeysuckle Development - Situated in the Hunter region, this development is seen as a best practice waterfront precinct. Developed by the Honeysuckle Development Corporation, the development focused regenerating a 50 hectare site along Newcastle Harbour.

The development incorporates a range of commercial, residential, and retail precincts, along with public spaces, a hotel and marina. The development has aimed to attract other investment to the area, stimulating the local economy. Development around the Marina includes high end restaurants, associated marine retail and commercial and a 36 apartment development.

Mildura Marina, Victoria also known as Dockside Mildura, is a $70 million marina development that commenced in 2006. It is situated along a 270m frontage on the Murray River and has five main precincts. Residential development is predominantly comprised of two story villas and townhouses and some apartments. There are also a small number of waterfront lots. A hotel and retail component aims to bring a unique offer the Mildura region, incorporating quality accommodation and conference facilities in addition to high quality boutique retail. The retail, commercial and residential development surrounds the 15 berth Marina. The development is expected to generate 400 new employment positions during construction, with 200 upon completion.

4.2 Key Characteristics and Lessons Learned

Following is a summary of the lessons learned for Pitt Street through studying other commercial marina and associated mixed-use developments. This research has indicated that the development should:

- Provide a unique experience and product. This supports the earlier finding that in order for the Pitt Street Waterfront Redevelopment to be most successful, a point of differentiation from the Town Centre and wider region will need to be provided. The case studies provide examples where there has been a point of differentiation between the experience and product available from that in the area in which the development is located.
- Provide connections to neighbouring areas and the City Centre. Site should be well integrated with neighbouring development and the Taree City Centre.
- Maximise exposure to the amenity of the site. In order to maximise the 'unique' experience available at the site, the redevelopment should focus development around the waterfront or river area to maximise exposure to the natural amenity of the site. This might be achieved through the provision of foreshore walkway and open space, maximising views for residential development or orienting retail (eg, restaurants, cafes) towards the waterfront.
- Provide a mix of uses and a mix of activities should be developed to provide an active waterfront. A mix of compatible uses and activities at the site to maximise activity over the site throughout the day / evening. Where this is not possible, need to ensure lighting and design reduces potential for crime / safety issues.
- Have relevance and be accessible to the existing local community. A 'unique offer' from the rest of Taree, but must maintain the 'local flavour'. The development must appeal to a mix of target groups both from 'outside' (eg, tourists, business visitors and marine-related

visitors), but there is a need to ensure that the development remains accessible to the local population. The site should build on existing features where possible (eg, heritage at the site, the fisherman's co-op) and site features should provide an experience that is accessible to the public (eg, leisure / open space) and retail or residential development that appeals to the local market.

Marina-Related Services and Carparking Requirements

Lessons learnt from the comparable development research indicated the following characteristics of marina development is an opportunity to:

- Address servicing requirements specific to the needs of marina-related visitors, including re-fuelling and sullage pump out services, public facilities (bathrooms and laundries) and public boat ramps.
- Provide a limited amount of light marina-related industrial development. It is important that only light marine oriented industrial uses are located at the Marina. Any heavy industrial uses should be located off site. When locating marine maintenance services, conflict with residential and other public uses should be avoided.
- Provide opportunities for marine-related services and retail to be located within shop-front development. There are a number of services and retail offering which should be provided in the Marina complex. These include boat mechanic and electrician, ship chandlery and tackle shop and boat brokers.
- Provide flexible carparking arrangements if possible (carparking arrangements will vary according to whether a boat ramp is located at the site or not). If a boat ramp is located at the site, then a larger proportion of the site will need to be dedicated to open carparking for cars and trailers. If a boat ramp is not located at the site, there is more flexibility in car parking arrangements in terms of size, style and location.

Residential

Lessons learnt from the comparable development research indicate that the development is an opportunity to:

- Provide for residential development of a different type and style to that currently available in the local market. As the supply of coastal development opportunities has declined and coastal house prices have increased, marina developments have provided opportunities for residential development in areas where housing of a similar type has not previously existed.
- Provide residential development that is located and designed to take advantage of the amenity of the site. People are attracted to marina developments due to the amenity they provide and their proximity to the water. In order to capitalise on this, elevated (tiered) residential development to maximise water views (over looking the marina and river) is advised.
- Provide higher density residential development around the marina. A review of other marinas indicates that best practice development incorporate higher density residential development around the Marina. This ensures vibrancy and activity in the precinct in addition to capitalising on water and marina views.

- Ensure privacy of access and security for residents at the site. Ensure separation between private residences and public areas (eg, through use of landscaping, retailing walls, change of site level and noise protection etc). This can also be achieved through elevating dwellings so that the lowest floor is a level above the street. This will also capitalise on water views.
- Be of high quality design and construction. Double-glazing and other high quality design component should be incorporated both as a means to avoid conflict between different types of land uses at the site and to attract the desired market. It is important to ensure that no potential conflict between service areas and residential dwellings exist to ensure ability of the site to provide marine services is not compromised.
- Ensure that development is not priced too high for the local market. Although the site must establish a point of difference and be of quality urban design and amenity, there is a need to ensure that the development is priced in a way that doesn't discourage take-up by the local market.
- Provide medium density development. Row houses, townhouses and villas will provide an opportunity to maximise exposure to amenity of the site, and capitalise on the relatively small amount of available riverfront land.

Retail and Commercial Development

Lessons learnt from the comparable development research indicate that the development is an opportunity to:

- Provide a unique offer to nearby centres, retail and commercial development. Marina associated developments have to opportunity to provide a boutique and tourist-related retail offer, however it is important that it still appeals to the local market.
- Ensure that retail is appropriate for its location at the site. There is the need to ensure retail and commercial development is located in an area of the site appropriate for the targeted customers (eg, marine-related retail should be located near to the marina, other retail at the site should be connected, but not necessarily be co-located with the marina). It is important that the nature of 'marina' visitors is taken into consideration. This will impact upon the location of other attractions such as gallery and markets. Other attractions such as an art gallery & museum, produce markets will increase interest to thee site, for both visitors and local residents and as such there is a need to provide strong connections between any additional uses and marina-related use, however potentially locating them in separate precincts. Consolidating commercial uses (including retail, hospitality and community infrastructure) can encourage vibrancy and assist in developing an active 'centre'.
- Look at bringing residential and retail close together. Consultation indicated that there is potential to incorporate retail and residential uses in a mixed use precinct (eg, Mildura) to ensure vibrancy of centre (however, as noted above, the design and construction of residential development needs to be of a high quality to prevent conflict in land use / degradation of amenity for permanent residents).
- Provide shop-front space for light marina-related industry. Shop front space for light commercial and industrial marine related uses could be located at back of other retail development to avoid conflict of land use.
- Cater for demand from marina-related visitors and local visitors by providing a small 'supplies' store. A small convenience or 'supplies' store may be required to cater for local

residents and marina 'traffic', but it is important that this is not a major supermarket which would compete with the town centre.

Tourism and Leisure

Lessons learnt from the comparable development research indicate that the development is an opportunity to:

- Address the need for a hotel. Marina developments provide an opportunity to cater for visitors and the local market (eg, corporate use, weddings as well as tourism). In other marina developments, a hotel has provided an important key anchor tenant (in addition to a marina). It is important to ensure good links between hotel (and any associated retail) and the remainder of the site.
- Provide for leisure-related retail. Development should capitalise on its river frontage and potential cycle links with the town centre. As such canoe and kayak hire, bike hire and boat hire should be located in the Marina precinct.
- Market local tourism opportunities and provide a shop-front for local tourism operators. As a potential major tourist and visitor attraction, the marina or retail precinct has the opportunity to incorporate shop fronts for local tour guides, charter boats and potentially the relocation of the Taree information centre.
- Cater for demand in areas where a strong houseboat industry exists. Successful Marinas such as Hindmarsh in SA and other Marinas on the Murray River and Myall Lakes often co-exist with a strong houseboat industry as this provides demand for mooring and berths and attracts visitors. In association with any marina development, there should be an effort to identify whether demand for houseboating along the Manning exists and whether this could be based out of Taree.

Community Infrastructure

Lessons learnt from the comparable development research indicate that the development is an opportunity to:

- Provide for quality open space and public facilities. The provision of public open space and facilities will positively affect the viability of development at the site by encouraging more people to use it. This should include bbq and picnic areas as well as accessible and sign-posted public toilets, to capture people 'passing through' the site. The provision of public toilets at the site would be a drawcard for day-trippers to stop-off and eat lunch in a nice spot and there are potential opportunities for ancillary retail.
- Ensure that there is good public access (including good pedestrian, car, boat and cycle connections) to the site. A high level of accessibility improves activity and vibrancy of the precinct as well as providing the local community with a feeling of ownership**.** All precincts of the site need to be accessible to ensure the highest level of usage.
- Enhance public access to the foreshore area. Public accessibility to the riverfront will attract a greater number of people and improves the amenity of the site.
- Ensure good links with surrounding areas through the provision of appropriate and reliable public transport services.

- Ensure good pedestrian and cycle connections throughout the site, Connectivity between different precincts including the marina, associated retail and a hotel if it is provided at the site will be vital to ensure that the people are attracted to all areas. This will help ensure that all precincts are vibrant and viable.
- Ensure good links with surrounding land use through design and built form. It is important that the site connects and relates to the surrounding residential and commercial land uses. This will improve community ownership of the site and visual amenity.

Staging

The comparable development research indicates the following characteristics of the staging of development:

- It is important to secure key anchor tenants (and attractions) early in the development (eg, marina, hotel) – both from a financing point of view, as well as to ensure the site is attractive. It is important to 'create the water' first and develop the canvas on which the rest of the development will sit. Hotel development or similar is often the next important stage – need to have something to draw people to the river and get the community excited about the new development.
- The developer's financial position is often a key influence. The ability to sell sites, hotel and residential often impact upon the staging of development at the site as this may finance other sections of the development.
- Generally, retail is developed at the same time as residential. It is generally agreed that that the retail and services should be provided to coincide with the release of residential development to provide an attractor. If the Marina is being developed first, it is recommended that retail and commercial uses coincide with completion of the marina. This will ensure that there is a range of facilities which attract people to the site. This will lead to better vibrancy of the precinct.
- Small amount of residential development (selling lots or 'off the plan') is a good up-front 'money spinner'. 'Off the plan' sales provide an opportunity raise capital for other development at the site.
- The development should be flexible and staged in such a way that the market can be 'tested' at various points along the way. This is particularly true for residential development which is higher density than is generally available in the surrounding region. Releasing expressions of interest throughout the process will also highlight the level of demand.

5 Development Principles and Opportunities for Consideration in the Redevelopment of the Pitt Street Site

This chapter brings together the findings from the various market assessment carried out for this study and outlines a number of characteristics that should be considered when redevelopment the Pitt Street site. A summary of specific opportunities for the site is shown in conclusion.

5.1 General Development Principles

These principles were outlined with regard to:

- The site overall;
- Marina-related services;
- Residential development;
- Retail and commercial development;
- Tourism and leisure development;
- Community infrastructure.

Overall

The Pitt Street site should provide:

- A unique experience and product.
- A mix of uses, facilities and activities across the site and particularly along the waterfront to ensure its frontage is active.
- Connections to neighbouring areas and the Taree City Centre.
- Retail and commercial development and public open space that maximises the amenity of the site, access to the waterfront and views.
- Activities and facilities that are accessible to and have relevance with the existing local community in addition to facilities that are attractions to visitors in their own right.
- Flexibility in the design of retail and the public realm such that the site is attractive to visitors year round.

Marina-Related Services

The Pitt Street precinct should provide marina-related activities and services that:

- Includes marina related services and retail.
- Provides appropriate carparking arrangements according to whether a boat ramp is located at the site (to be determined through the marina feasibility study undertaken by Maunsell).

Residential Development

The Pitt Street precinct should provide residential development that:

- Is located and designed so as to maximise exposure to the amenity of the site. This should maximise water views overlooking the marina and river for example.
- Is designed to maximise privacy.
- Is of high quality design and construction to address potential noise and amenity issues affected by its location on the river-front, close to the marina, retail and the public realm.
- Is priced to cater for the local market. Residential development at the site needs to remain attractive to the local market and affordable relative to coastal development – this is a key attraction of purchasing in Taree.
- Is marketed towards Taree's existing population as well as 'sea changers' / retirees. (Demand for residential is likely to come from the local population as well as 'new movers' to Taree. Preliminary research indicates that the majority of buyers are likely to be owner-occupiers).
- Caters for an ageing population by including smaller properties that require less maintenance and are in close proximity to services.

Retail and Commercial

The Pitt Street precinct should provide retail and commercial development that:

- Is a 'unique' offer in Taree.
- Incorporates a 'local flavour' into the retail and commercial offer available at the site.
- Includes a mix of retail that caters for locals to Taree and the site, as well as visitors.
- Is provided in a clearly defined 'heart' of the development.
- Includes leisure and tourism-related retail (for example, canoe kayak, bicycle or boat hire, a shop-front for local tourism providers - tours and charter boats, and potentially the relocation of the Taree visitor information centre).
- Incorporates marine-related retail.

Tourism and Leisure

The Pitt Street precinct should provide tourism and leisure development that:

- Incorporates the design of a 'gateway' for visitors entering the town centre from Old Pacific Highway / Airport.
- Creates access and vantage points to view events on the Manning River and to cater for visitors to Taree for these events.
- Links the Pitt Street site to other recreation and entertainment facilities in Taree - the Taree entertainment centre for example.
- Incorporates a hotel with flexible conference facilities to cater for business and tourist visitors to Taree as well as the local market.
- Links with surrounding areas via transport on the Manning River (eg, Coocumbac Island Nature Reserve).
- Has good public pedestrian and cycle connections throughout the site and with other areas of the LGA, including the Taree City Centre.

Community Infrastructure

The Pitt Street site should provide development that:

- Is an inviting environment for local people, a space that creates a clear sense of place and pride for local people.
- Is designed to address crime and safety, displays a strong sense of ownership (private or public), and incorporates measures to ensure pedestrian safety
- Captures local heritage through built form by adaptive reuse of existing heritage items identified at the site and design that this respectful of the character of the surrounding area.
- Provides quality open space and public facilities that are attractive to locals and visitors, children, families, young and old people.
- Includes links between the surrounding residential area and the Taree City Centre through appropriate and reliable public transport services (eg, a shuttle service), walking and cycling.
- Provides community-based retail / commercial development.
- Provides good access to onsite and offsite services and facilities for both future precinct residents' access to offsite services and facilities and local Taree residents' access to onsite services and facilities.
- Includes public open space and facilities that are designed and managed to ensure that the area is an attractive and safe place for visitors and locals.

5.2 Summary of Specific Opportunities

The following specific opportunities have been identified in relation to residential, retail and commercial development, community facilities as well as the staging of the development.

The site should provide *residential development* that:

- Primarily caters for the local market.
- Is predominantly medium density residential development, including villas, townhouses and apartments in a tiered development up to 3 storeys[14].
- Is 2-3 bedroom dwellings with storage facilities and carparking.
- Is priced to suit the local market and reflect Taree's position relative to the coast (consultation for this study has indicated that prices should range from $450,000 to $650,000).
- Is staggered or uses landscaping and physical separation to ensure privacy.
- Is of high quality design and construction, eg double-glazing.

The site should provide *retail development* that:

- Includes boutique retail, a high end tavern, restaurant or café as well as a small supplies store.

[14] It is noted that SGS's housing demand projections identify the likely future demand for between 351 and 402 additional medium-density dwellings within the Greater Taree LGA. The proposed development is likely to be able to cater for the majority of this demand.

- Incorporates leisure and tourism-related retail including for example canoe, kayak, bicycle or boat hire.
- Includes a shop-front for local tourism providers and potentially the relocation of the Taree visitor information centre to the site.
- Involves the reuse of the dairy factory buildings and relocation of fisherman's co-op at the site to incorporate a 'local flavour'.
- Provides a flexible space to host the organic fresh food markets.
- Includes marina-related retail including a chandlery and boat broker.
- Is located in a clearly defined 'heart' around the marina and linked to the old dairy factory site.

The site should provide *commercial development* that:

- Includes a high quality, 4-4.5 star hotel with flexible conference facilities.
- Includes boutique office space to cater for home-based businesses.
- Is located in a clearly defined area with exposure to Manning River drive, but is well linked to retail development at the site.

The site should provide *tourism and leisure development* that:

- Includes a gateway site that is attractive to visitors entering Taree on Manning River Drive.
- Includes a museum, Indigenous art and general art space.
- Is clustered at the 'heart' of the development on the waterfront.

The site should provide *community facilities* that:

- Include high quality facilities including BBQs, public parks.
- Include flexible open space to create access and vantage points to view events on the Manning River, eg, a sloping grassed area on the river bank.
- Are well managed.

The overall design of the site should:

- Use lighting and landscaping to create opportunities for natural surveillance.
- Include cycle, pedestrian and boat links across the site and to surrounding precincts.

The *staging of development* at the site should include:

- Establishment of a key anchor tenant at the site early in the development process.
- Construction of the marina first.
- Incorporation of public open space and activities areas into the early stages of the development.
- Marking and sale of some residential dwellings off the plan to provide an opportunity to raise capital as well as to 'test' the market.

It is noted that this study includes a broad analysis to inform the masterplan for the proposed redevelopment of the site. A financial feasibility study has not been completed as part of this study. A financial feasibility study should be conducted once the master plan for the site is complete.

6 References

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Appendix A – The Local and Regional Context

An understanding of the current situation and previous trends is shown in relation to:

- Demographic Structure and Trends;
- Socio-Economic Characteristics;
- Housing;
- Employment;
- Tourism;
- Transport;
- Infrastructure;
- Community Facilities and Open Space.

This analysis compares and contrasts the Greater Taree LGA, with the Mid-North Coast region and NSW.

Demographic Structure and Trends

Population

In 2006, Greater Taree had a total population of 45,144 persons. Population growth in Greater Taree between 1996 and 2006 was 2,804 persons (representing a total population change of 6.6 percent). This was slightly lower than the Mid North Coast average over the same period (a total population change of 8.6 percent).

	Greater Taree	Mid North Coast	NSW
2006 Population	45,144	284,674	6,549,177
1996 – 2001 Population % Change	1.2%	4.6%	5.3%
1996 – 2006 Population % Change	6.6%	8.6%	9.2%

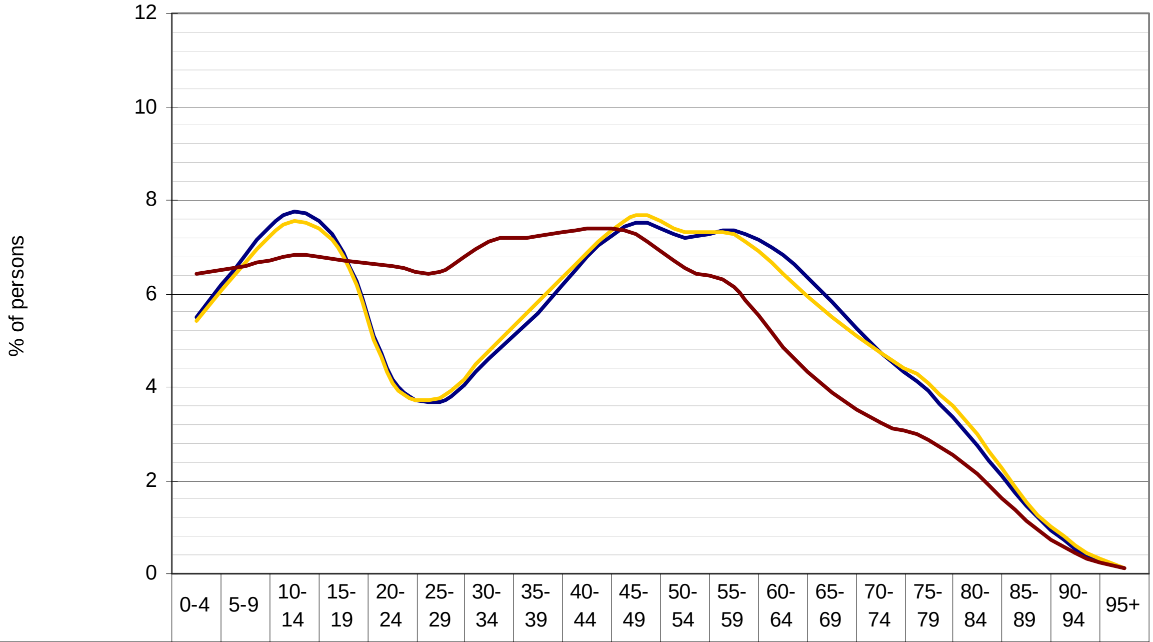
Population density within Greater Taree is concentrated within coastal town centres. Hallidays Point has the highest population density of 40.93 people per km^2, followed by Old Bar with 31.16 persons per km^2. Taree Community Planning Area[15] had a population density of 27.53 persons per km^2 (GTCC 2004).

[15] As defined in the *Greater Taree Community Plan 2005–2009*.

Age Structure

The median age of the population in Greater Taree was 43 years; similarly the Mid North Coast has a median age of 43 years. The median age in NSW is a younger 37 years. Greater Taree is ageing rapidly. In 1996 the median age of the population was 37 years and in 2001 the median age was 40 years. Figure 21 illustrates the age profile for Greater Taree compared to the Mid-North Coast and NSW in 2006. Greater Taree, along with the Mid-North Coast, is characterised by an ageing population. A low proportion of working aged adults currently reside in Taree, particularly those aged 19-39 years. A higher proportion of people aged over 50 years, live in Taree and on the Mid-North Coast compared to NSW.

Figure 21. Age Profile 2006



	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85-89	90-94	95+
Greater Taree	5.5	6.8	7.8	6.9	4.2	3.7	4.6	5.6	6.8	7.5	7.2	7.4	6.8	5.8	4.7	3.9	2.8	1.4	0.5	0.1
Mid-North Coast	5.4	6.7	7.5	6.8	4.1	3.8	4.8	5.8	6.9	7.7	7.3	7.3	6.4	5.5	4.7	4.1	3.0	1.5	0.6	0.1
NSW	6.4	6.6	6.8	6.7	6.6	6.5	7.1	7.2	7.4	7.3	6.6	6.1	4.8	3.9	3.2	2.9	2.1	1.1	0.4	0.1

Source: ABS 2006

Ethnicity

Taree and the Mid-North Coast region generally, have a high proportion of Australian-born residents. In Greater Taree the proportion of persons born in Australia is 91.9 percent. As shown in 0, of Australian-born residents, the proportion of indigenous people in Greater Taree and the Mid-North Coast is higher than NSW.

Figure 22. Australian Born Residents, 2006

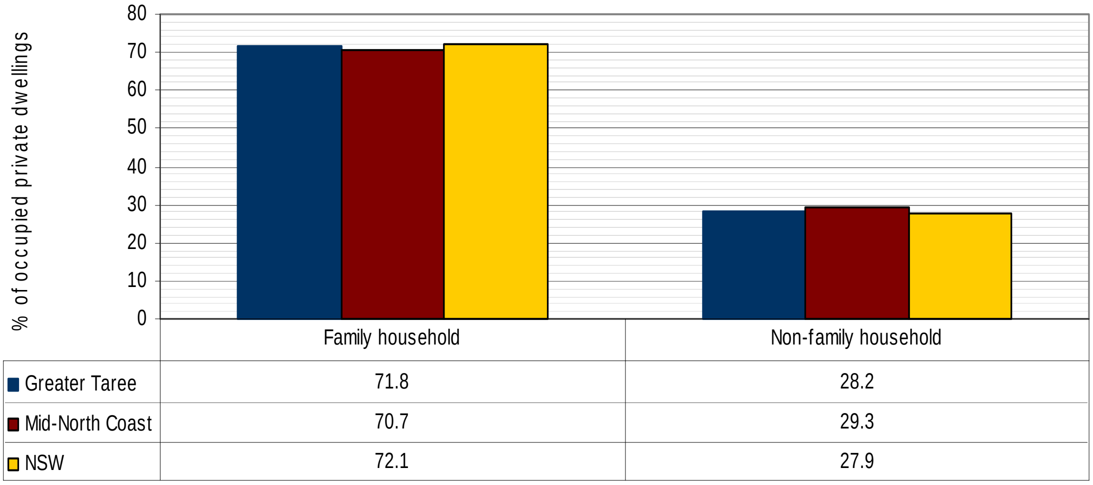
	Indigenous	Non-indigenous
Greater Taree	4.3 percent	95.0 percent
Mid-North Coast	4.3 percent	94.2 percent
NSW	2.1 percent	92.8 percent

Source: ABS 2006

Household and Family Type

Figure 23 shows a comparison of household type between Greater Taree and the Mid-North Coast region and NSW. The total number of family households in Greater Taree in 2006 was 12,490, and the number of non-family households was 4,914. The proportion of family and non-family households in Greater Taree is very similar to the Mid-North Coast and NSW proportions. ‘Family’ households mean those households with adults and children, while ‘Non-family’ households refer to either lone person or group households.

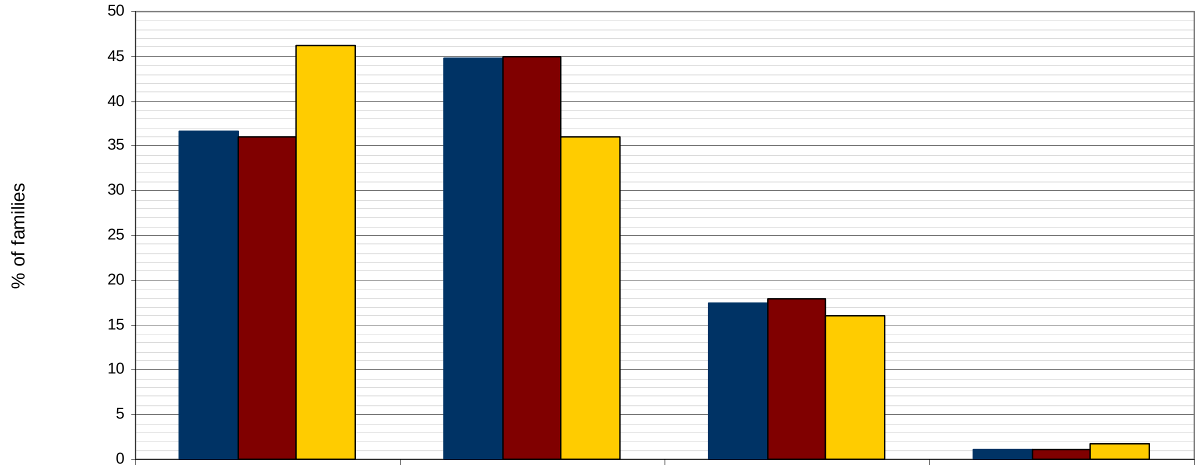
Figure 23. Household Type 2006



Source: ABS 2006

Greater Taree LGA and the Mid-North Coast have a significantly higher proportion of ‘couple families without children’ (44.8 percent and 45.0 percent respectively), compared with the NSW average (38.0 percent). Coupled with high median age in the area, this is likely to be indicative of the large number of retirees living in the area without children. Family type is shown in Figure 24.

Figure 24. Family Type 2006



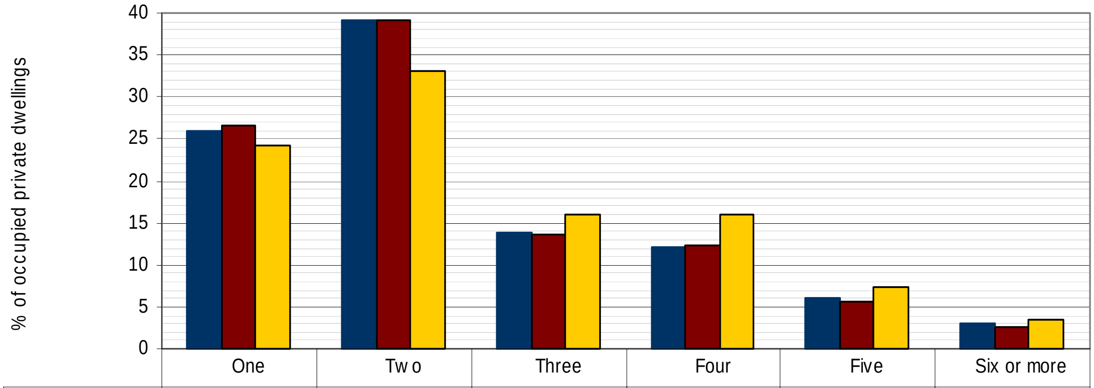
	Couple with children	Couple without children	One parent family	Other family
Greater Taree	36.7	44.8	17.5	1.0
Mid-North Coast	35.9	45.0	18.0	1.1
NSW	46.2	36.0	16.1	1.7

Source: ABS 2006

Household Size

One and two person households reside in approximately 65 percent of dwellings in the LGA (with two person households making up the bulk, residing in 40 percent of dwellings). Figure 25 shows the proportion of dwellings by number of persons usually resident.

Figure 25. Persons per Household 2006



	One	Two	Three	Four	Five	Six or more
Greater Taree	26	39	14	12	6	3
Mid-North Coast	27	39	14	12	6	3
NSW	24	33	16	16	7	3

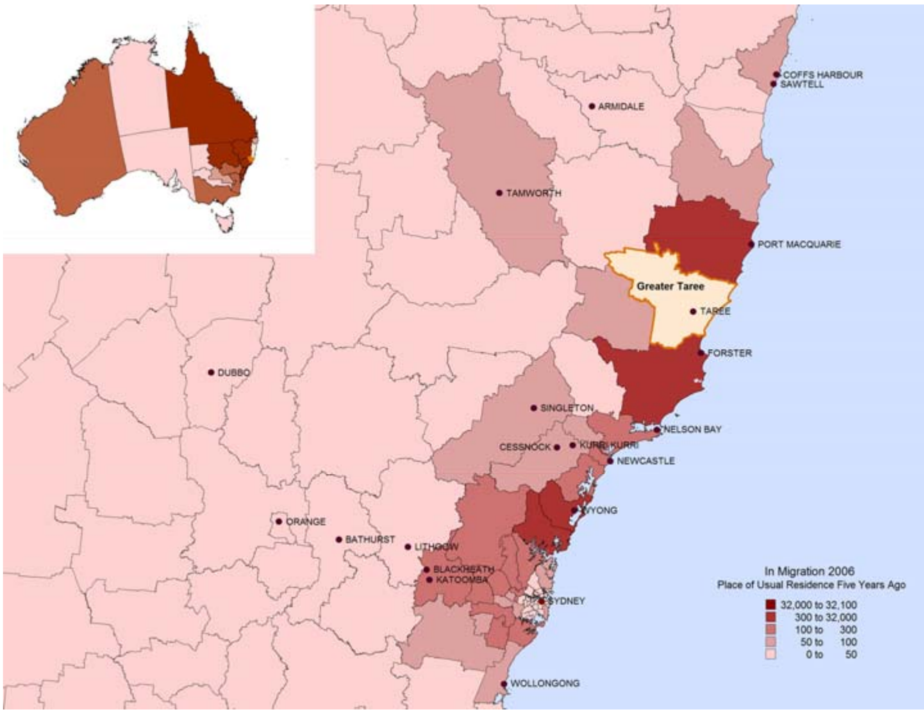
Source: ABS 2006

Since 1996, Greater Taree has experienced an increase of around 40 percent in the number of one and two person households and decrease in the number of larger households (four plus residents). This is significant, as although 'separate houses' continue to dominate in terms of dwelling type, it is likely that many of these dwellings are in fact under-occupied.

In-Migration

New residents to the LGA are predominantly from nearby coastal areas, the Central Coast and Sydney. Neighbouring LGAs of Great Lake and Port Macquarie Hastings, the north coast and central coast are the source of most recent residents to Taree LGA (refer to Figure 26).

Figure 26. Major Origins of People Moving to Greater Taree LGA, 2001-06



Source: SGS Economics and Planning 2007, ABS 2006

Socio-Economic Characteristics

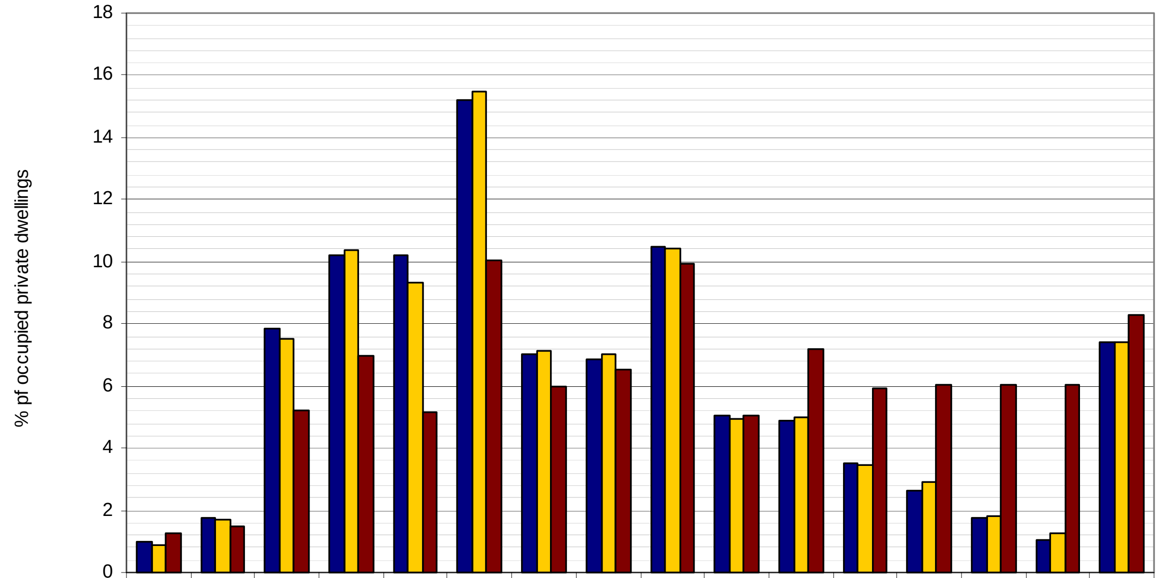
Household Income

Greater Taree LGA is currently characterised by a high proportion of low income households and a low proportion of high income households. As shown in Figure 27 this is similar to the Mid-North Coast. The average household income in Greater Taree was $635 a week.

The number of higher income households in Greater Taree has grown over the past five years. From 2001 to 2006 the proportion of people who earned over $2,000 increased from 2.5 percent to 5.5 percent. This trend is consistent with the Mid North Coast with the proportion of people increasing also by 3 percent. However, NSW experienced a much higher increase of 8.1 percent.

There was a decline in the proportion of lower income households over the same period. There was a 12.2 percent decrease in lower income households (those who earned less than $500) in Greater Taree from 43.12 percent to 30.93 percent. Similarly the Mid North Coast and NSW also experienced decreases of 14 and 8 percent respectively.

Figure 27. Household Income 2006



	Negative/Nil incom	$1-$149	$150-$249	$250-$349	$350-$499	$500-$649	$650-$799	$800-$999	$1,000-$1,199	$1,200-$1,399	$1,400-$1,699	$1,700-$1,999	$2,000-$2,499	$2,500-$2,999	$3,000 or more	Partial income
Greater Taree	1.0	1.7	7.9	10.2	10.2	15.2	7.0	6.9	10.5	5.0	4.9	3.5	2.7	1.8	1.1	7.4
Mid-North Coast	0.9	1.7	7.5	10.4	9.3	15.5	7.1	7.0	10.4	4.9	5.0	3.5	2.9	1.8	1.3	7.4
NSW	1.2	1.5	5.2	7.0	5.2	10.0	6.0	6.5	10.0	5.1	7.2	5.9	6.0	6.0	6.0	8.3

Source: ABS 2006

Unemployment[16]

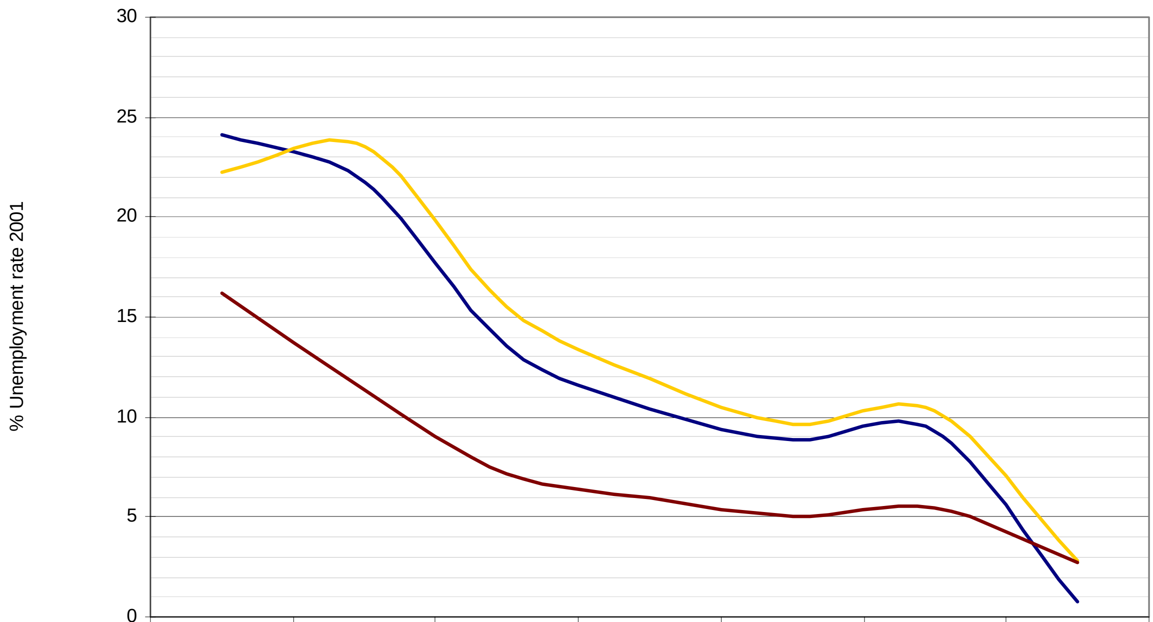
In 2001, Greater Taree has an unemployment rate of 12.2 percent (a total number of 1,989 unemployed persons). Taree's unemployment rate is slightly lower than the Mid North Coast generally (13.2 percent), but significantly higher the NSW average of 7.2 percent. Small labour market statistics (published by the Department of Employment and Workplace Relations) provide

[16] Data shown for labour force characteristics in this report is based on 2001 ABS data. 2006 employment data will not be released until late October 2007. The 2001 ABS data is supplemented with more recent statistics where available.

more recent data on unemployment rates. This shows that since 2001 Taree's unemployment rate has steadily declined, reaching below 7 percent unemployment in 2004 and in mid 2004, Taree's unemployment rate was around 8 percent[17].

As shown in Figure 28, like the Mid-North Coast (22.2 percent), Greater Taree LGA was characterised by high levels of youth unemployment (15-19 year olds) (24.2 percent). Young adults (20-24 years) also experienced high rates of unemployment in 2001. Males aged 20 to 24 had the highest concentration of unemployment with 19.1 percent, particularly indigenous males who had 38.3 percent unemployment (GTCC 2004).

Figure 28. Unemployment Rate 2001



	15-19 years	20-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65 years and over
Greater Taree	24.2	21.7	13.5	10.4	8.9	9.3	0.7
Mid-North Coast	22.2	23.5	15.5	11.9	9.7	10.3	2.9
NSW	16.2	11.3	7.1	6.0	5.0	5.4	2.7

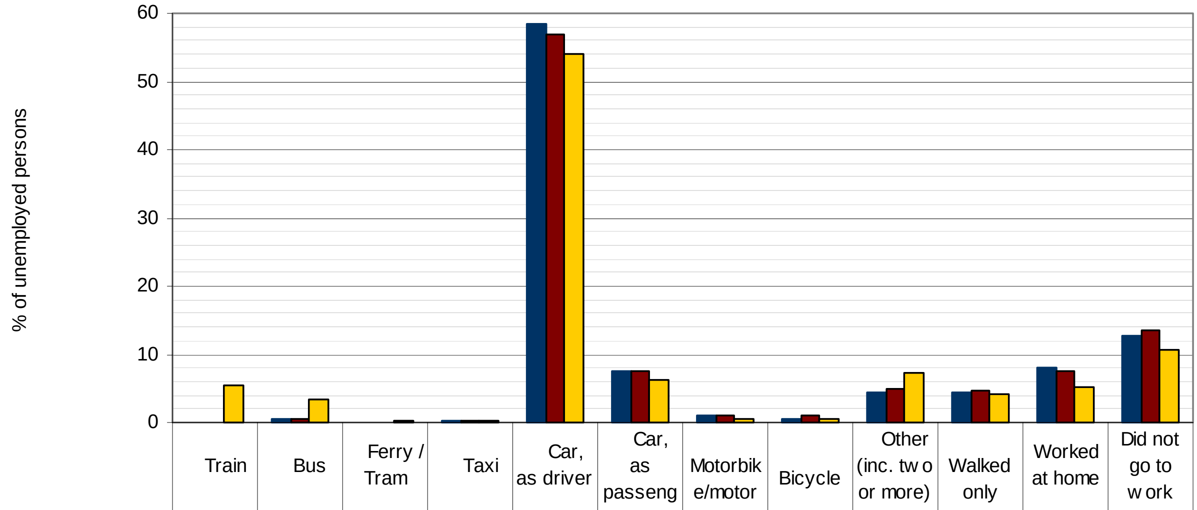
Source: ABS 2006

Public Transport

As shown in 0 there appears to be a very high level of car dependence in Taree, with a high percentage of residents driving their cars to work (58.5 percent), compared to the Mid North Coast (57 percent) and NSW (54.1 percent).

[17] Hunter Valley Research Foundation (2005) *Greater Taree Economic Profile – Current Structure and Future Directions*

Figure 29. Mode Share, Greater Taree LGA, 2006



	Train	Bus	Ferry / Tram	Taxi	Car, as driver	Car, as passeng	Motorbik e/motor	Bicycle	Other (inc. tw o or more)	Walked only	Worked at home	Did not go to w ork
Greater Taree	0.1	0.5	0.0	0.2	58.5	7.5	1.0	0.6	4.4	4.4	8.1	12.8
Mid-North Coast	0.1	0.5	0.0	0.1	57.0	7.5	1.0	1.2	4.8	4.8	7.6	13.4
NSW	5.5	3.3	0.2	0.3	54.1	6.1	0.5	0.6	7.4	4.2	5.2	10.7

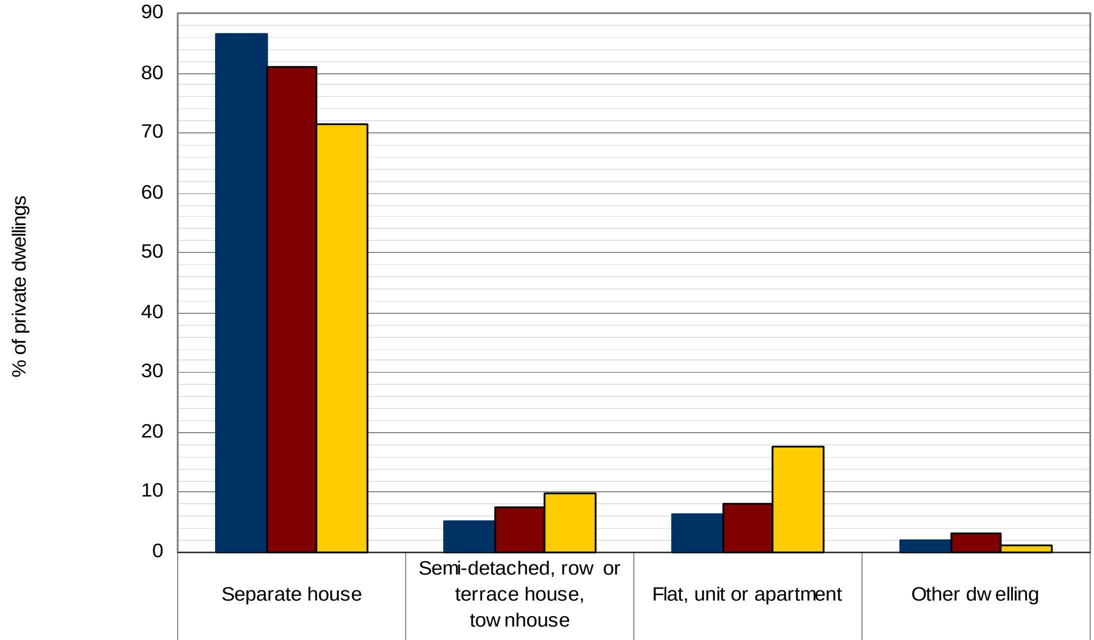
Source: ABS 2006

Current Housing Characteristics

Dwelling Characteristics

‘Separate houses’ are the dominant dwelling type in Greater Taree occupying 87 percent of the local housing market, higher than the Mid-North Coast and NSW benchmarks. In comparison, there are fewer ‘semi-detached’ and ‘flat/unit’ dwellings proportionally across Greater Taree than the benchmark areas. Figure 30 illustrates the proportional distribution of housing types across Greater Taree compared to the Mid-North Coast and NSW.

Figure 30. Housing Type 2006

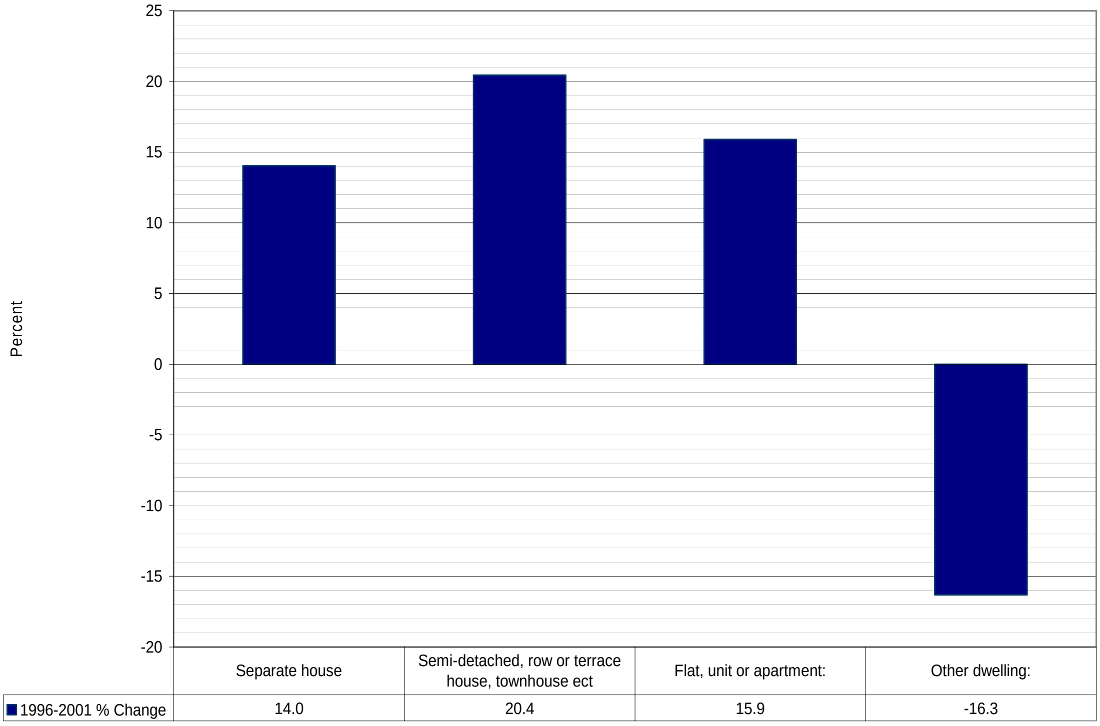


	Separate house	Semi-detached, row or terrace house, townhouse	Flat, unit or apartment	Other dwelling
Greater Taree	86.6	5.1	6.3	2.0
Mid-North Coast	81.1	7.6	8.2	3.1
NSW	71.4	9.7	17.7	1.1

Source: ABS 2006

Although 'semi-detached' dwellings do not feature strongly in the Greater Taree dwelling profile, this dwelling type has experienced the most significant growth over the last decade; registering an increase of around 20 percent between 1996 and 2006. 'Flats/units' have also experienced notable growth (around 15 percent) and separate houses experiencing a growth of 14 percent (refer to Figure 31).

Figure 31. Dwelling Change, 1996 - 2006

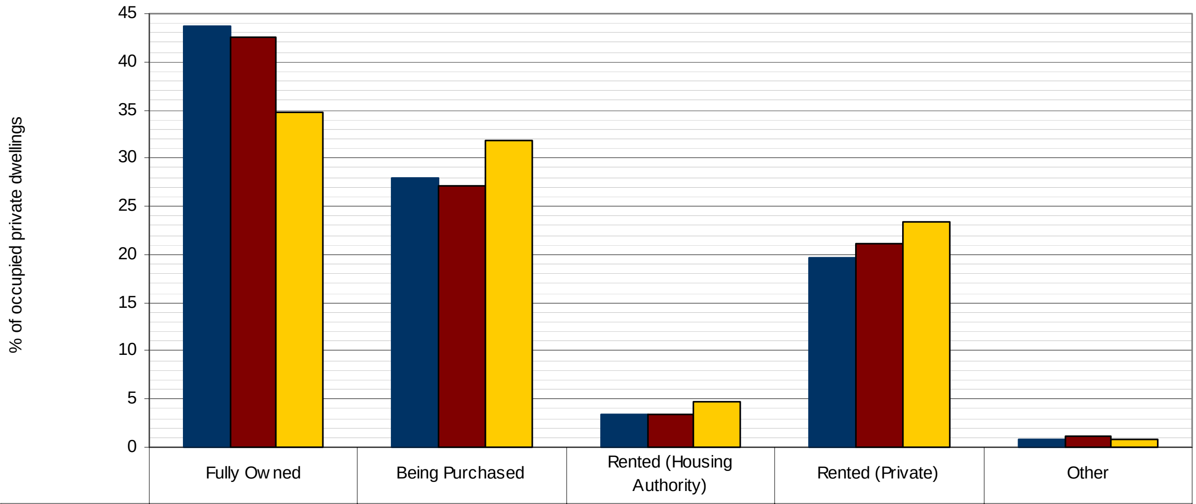


Source: ABS 2006

Dwelling Tenure Type

The Greater Taree residential market is largely characterised by owner-occupiers with around 70 percent of the population either fully owning or purchasing their home. The proportion of 'full ownership', in particular, is slightly higher than the Mid-North Coast benchmark and significantly higher than NSW. In comparison, the proportion of residents in the rental market is slightly lower than the benchmark areas. Figure 32 illustrates dwelling tenure type.

Figure 32. Tenure Type 2006



	Fully Owned	Being Purchased	Rented (Housing Authority)	Rented (Private)	Other
Greater Taree	43.8	27.9	3.4	19.7	0.8
Mid-North Coast	42.5	27.1	3.4	21.1	1.2
NSW	34.8	31.9	4.7	23.4	0.8

Source: ABS 2006

Public Housing

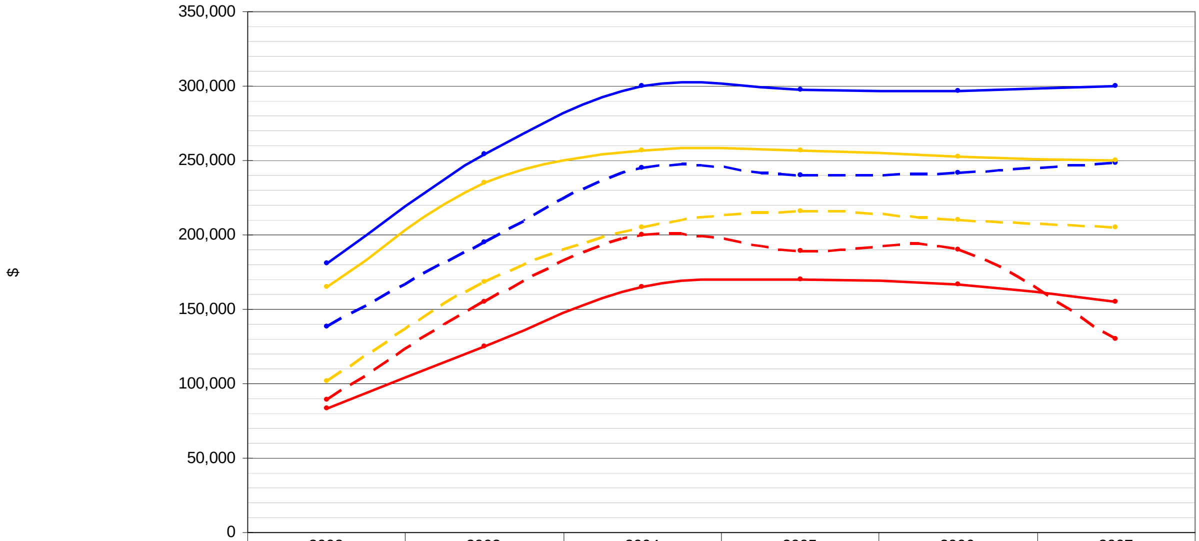
Public housing is also a feature of the Greater Taree LGA. In terms of stock, there are approximately 800 properties managed by the NSW Department of Housing (DoH) within the LGA; 701 of which are owned by the DoH and the remainder leased from the private market. The majority of these properties are in Taree, Chatham and Wingham[18].

Housing Cost

Currently median prices in Greater Taree are $40,000 to $50,000 less than the Mid-North Coast benchmark. In 2006, the median price for separate dwellings in Greater Taree was $248,000 (compared with $300,000 for Mid-North Coast) and the median price for medium density dwellings in Greater Taree was $205,000 (compared with $250,000 for Mid-North Coast). However, 'land only' has decreased in median price dropping below the Mid-North Coast benchmark where previously it was higher. The following chart illustrates change in median dwelling prices over the last five years (2002 to 2007).

[18] Greater Taree City Council (2004) Greater Taree Community Plan 2005-2009

Figure 33. Change in Median Price (2002 to 2007)



	2002	2003	2004	2005	2006	2007
Separate Dwellings GTCC	138,000	195,000	245,000	240,000	242,000	248,000
Separate Dwellings MNC	181,000	254,000	300,000	297,500	296,750	300,000
Medium Density GTCC	101,500	168,000	205,000	215,500	210,000	205,000
Medium Density MNC	165,000	235,000	256,500	257,000	252,500	250,000
Land Only GTCC	89,000	155,000	200,000	189,500	190,000	130,000
Land Only MNC	83,000	125,000	165,000	170,000	167,000	155,000

Source: RP Data 2007 (**GTCC = Greater Taree City Council**; **MNC = Mid-North Coast**)

Recent Sales Activity

A recent report by property consultants Knight Frank (*NSW Coastal Regions Residential Market Overview* 2007), indicates that at a broader level, residential supply entering the coastal market of NSW[19] dropped 22 percent over the 2005 to 2006 period. This dip in supply is forecast to rectify with around 24,000 units (across 365 coastal projects) due for completion over the next two years, a large proportion of which will be retirement and aged care developments. According to this report, the Mid-North and Hunter Coasts are expected to dominate supply of new housing providing 61% of this stock.

An important characteristic of the coastal residential market is its continued relationship with the retirement and aged care providers. According to property consultants Knight Frank, the supply of retirement and aged care facilities has been strong in the Mid-North Coast, with 665 dwellings across 25 projects entering the market during 2005 to 2006 and nearly 1,400 dwellings expected to come online over the next two years[20].

[19] North-East Coast, Mid-North Coast, Hunter Coast, Central Coast, Illawarra and South Coast

[20] Knight Frank (2007) NSW Coastal Regions Residential Market Overview

Recent sales activity is an indicator of the supply of new housing stock available to the market. The plateau (and decline) in median prices described above has been coupled by a significant decline in the number of sales in Greater Taree, and the Mid-North Coast. This has been characteristic of the NSW residential market in general which has experienced a prolonged decline in activity. Table 5 shows the number of sales in Greater Taree benchmarked against the Mid-North Coast.

Consultation undertaken for this study indicated that local property agents are optimistic that this decline in sales activity is likely to reverse, commenting that the stabilisation in prices and cheaper market in Taree might once again drive buyer interest in Greater Taree producing more listings. However there is the general perception that the Taree housing market is "the last to rise and first to fall".

Table 5. Number of Sales, 2002-2007

	Greater Taree	Mid-North Coast
Separate Dwelling		
2002	1,187	8,275
2003	1,020	6,948
2004	565	4,342
2005	535	3,949
2006	557	4,372
2007	365	3,064
Medium Density Development		
2002	252	3,529
2003	272	2,838
2004	120	1,686
2005	98	1,365
2006	82	1,516
2007	65	985
Land Only		
2002	1,113	5,353
2003	856	4,707
2004	361	2,352
2005	300	1,776
2006	249	1,517
2007	153	926

Source: RP Data 2007

Future Dwelling Demand

This section of the report reviews the future demand for housing in Greater Taree LGA. The analysis draws on data from:

- Population and Dwelling Projections contained in the *GTCC Local Growth Management Strategy, 2007;*
- Transport and Population Data Centre projections by age, 2004; and
- SGS estimates of future dwelling demand by housing type based on population growth.

Population Growth

In 2006, Greater Taree had a total population of 45,144 persons. Population growth in Greater Taree between 1996 and 2006 was 2,804 persons (representing a total population change of 6.6 percent). This was slightly lower than the Mid North Coast average over the same period (a total population change of 8.6 percent).

The *GTCC Local Growth Management Strategy, 2007*, shows future population forecasts for the Greater Taree LGA, rural and urban areas. The *Local Growth Management Strategy* shows that Greater Taree is likely to experience 34 percent growth in population over the next 25 years, an increase of 23,153 people (Table 6).

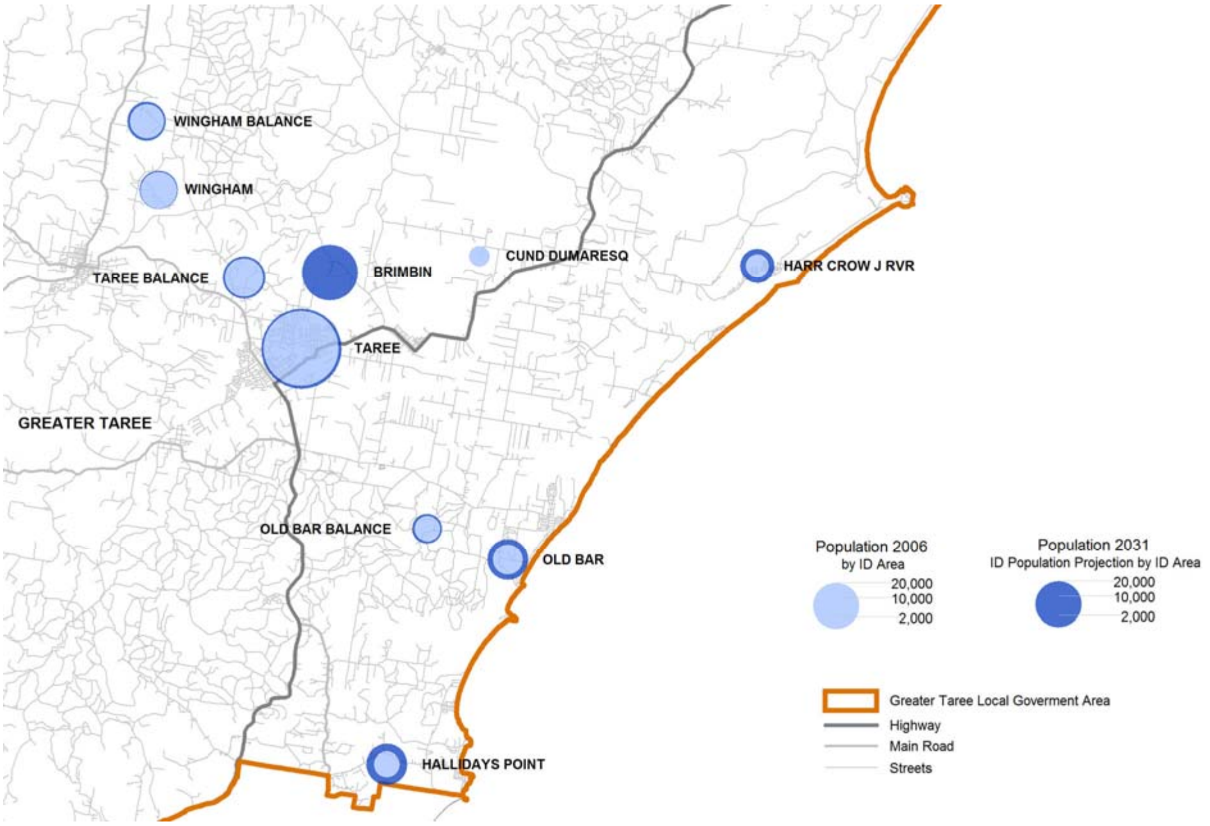
Table 6. Population Projections, Greater Taree LGA, 2006-2031

	2006	2016	2031	Absolute Change (2006-2031)	% Change (2006-2031)
Greater Taree	45,154	54,613	68,307	23,153	33.9
Taree	17,121	17,910	19,162	2,041	10.7

Source: GTCC 2007

Much of this growth is expected to be accommodated in the town of Taree and nearby Greenfield development at Brimbin. The coastal centres of Old Bar, Hallidays Point, and Crowdy/ Harrington/ Johns River are also expected to experience a significant increase in population to 2031 (Figure 11).

Figure 34. Population Projections, Greater Taree LGA, 2006-2031

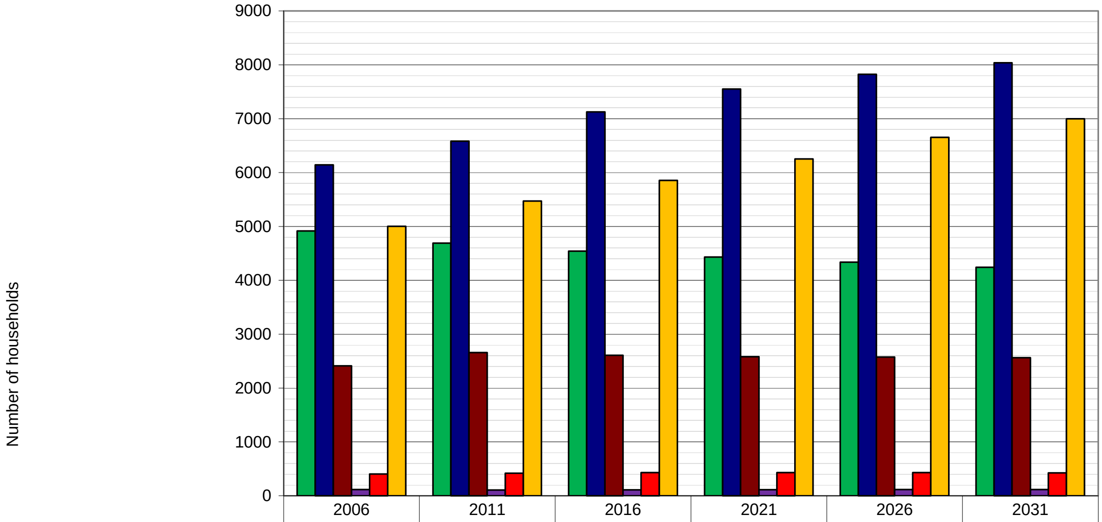


Source: SGS Economics and Planning, 2007, (based on GTCC 2007)

An increase in the population of Greater Taree will bring a change to the demographic profile of the region. The type of household or family that one lives in is a predictor of the dwelling type that one demands. SGS's housing demand modelling therefore requires a breakdown of population by household type. This data was not available from the *GTCC Local Growth Management Strategy, 2007* at the time of undertaking this study. The NSW Department of Planning's Transport Population and Data Centre (TPDC) projections were therefore used. TPDC projections were applied to the dwelling forecasts within the *GTCC Local Growth Management Strategy, 2007.*

Using these projections, SGS's estimates of family types in Greater Taree suggest that people living in couple families with children are expected to experience relatively small growth in Greater Taree while individuals living in couple families without children and lone person households are expected to grow most rapidly (Figure 12).

Figure 35. Change in Household Type, Greater Taree LGA, 2006-2031



	2006	2011	2016	2021	2026	2031
Couple family with children households	4,917	4,689	4,543	4,433	4,336	4,241
Couple family without children households	6,143	6,582	7,124	7,552	7,823	8,036
One parent family households	2,411	2,657	2,608	2,581	2,575	2,564
Other family households	116	107	111	114	116	118
Group households	406	420	429	432	429	427
Lone person households	5,004	5,475	5,855	6,254	6,655	6,999

Source: TPDC 2004

Dwelling Demand

The *GTCC Local Growth Management Strategy, 2007* contains dwelling demand projections (25 year forecasts) based on the following three scenarios:

4. Increase in dwellings based on 2001-2006 Dwelling Construction Rate
5. Increase in dwellings based on 1% Population Growth Rate
6. Increase in dwellings based on 1.25% Population Growth Rate

At 2006, the Greater Taree LGA accommodated 20,003 dwellings, Table 7 shows that the three scenarios tested are likely to produce dwelling demand for an additional 9,750 to 11,000 dwellings.

Table 7. Dwelling Demand Projections, Greater Taree LGA, 2006-2031

Scenario	25 Year Demand	Av Annual Demand	2031 Total
Based on 2001-2006 Dwelling Construction Rate	9,755	390	29,758
Based on 1% Population Growth Rate	10,300	412	30,303
Based on 1.25% Population Growth Rate	10,957	438	30,960

Source: GTCC 2007

According to the *Local Growth Management Strategy*, Inner Taree, Old Bar, Hallidays Point, and Crowdy/Harrington/Johns River are expected to drive the majority of this demand. Table 8 presents dwelling demand projections for inner Taree (based on a 2006 base of 7,434 dwellings). Between 1,400 and 2,200 additional dwellings are projected for Inner Taree to 2031.

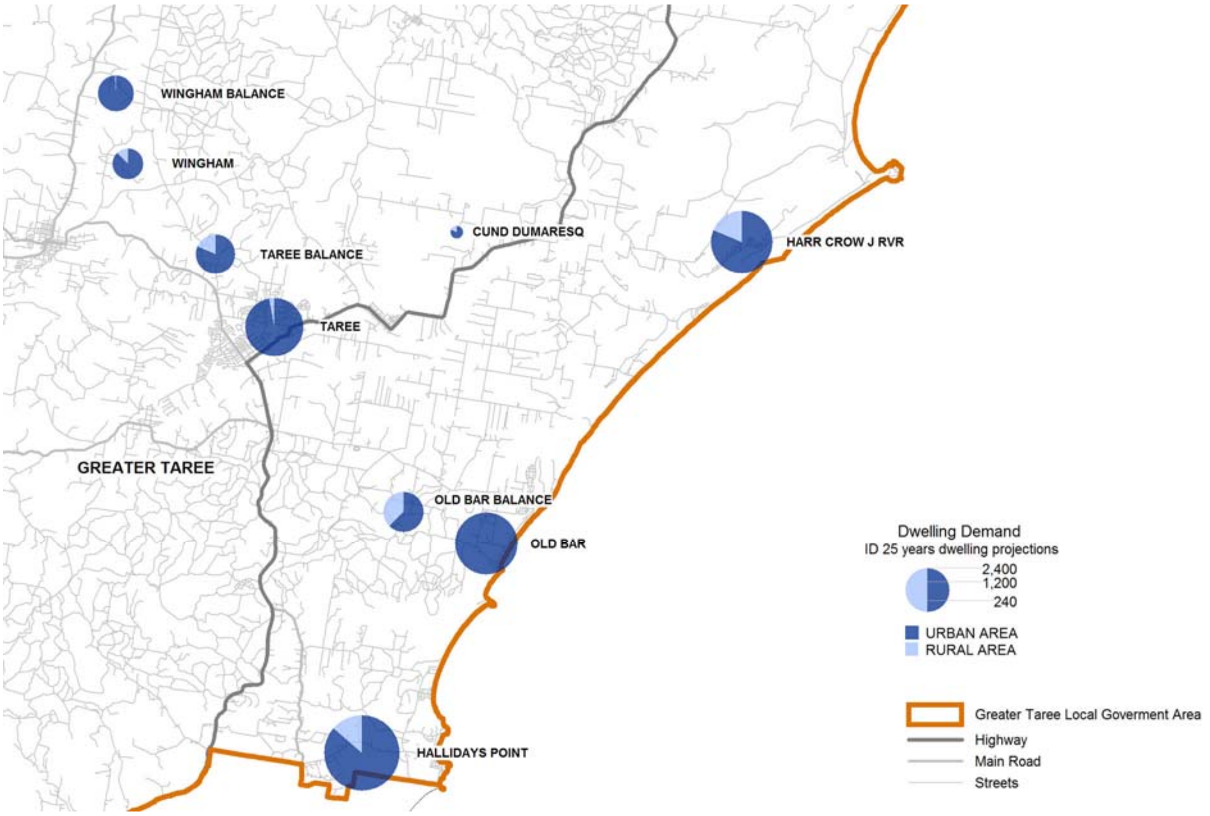
Table 8. Dwelling Demand Projections, Inner Taree, 2006-2031

Scenario	25 Year Demand	Av Annual Demand	2031 Total
Based on 2001-2006 Dwelling Construction Rate	1,410	56	8,844
Based on 1% Population Growth Rate	2,100	84	9,534
Based on 1.25% Population Growth Rate	2,234	89	9,668

Source: GTCC 2007

The dwelling demand forecasts based on the 2001-2006 Dwelling Construction Rate are available at smaller area level (urban and rural) in the *GTCC Local Growth Management Strategy, 2007* (shown in Figure 13) below. Based on previous construction trends, the largest projected dwelling demand is likely to occur in the urban coastal areas of Halliday's Point (an additional 2,035 dwellings), Old Bar (1,600 dwellings) and Crowdy/Harrington/Johns River (1,315 dwellings). An additional 1,370 dwellings is projected for the urban area of Taree.

Figure 36. GTCC Dwelling Demand Forecasts, 2006-2031



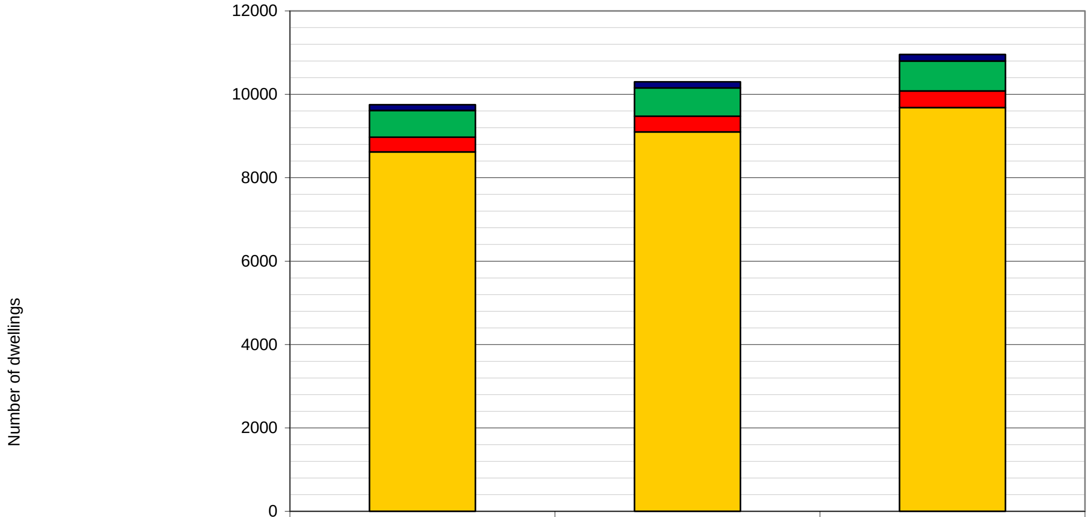
Source: SGS Economics and Planning, 2007, (based on GTCC, 2007)

A mix of dwelling types is needed in Greater Taree in the future to meet the housing needs and support future growth of the population. Along with an increase in the number of dwellings, the *type* of dwelling demanded is also an important consideration. The demand for more housing in Greater Taree is driven by population growth, as well as demographic change and social trends leading to less people living in each household.

SGS's estimates show that of the majority of additional dwellings required between 2006 and 2031 to meet demand under each of the scenario's identified in the *GTCC Local Growth Management Strategy, 2007*, between 8,621 and 9,681 is accounted for by separate houses, between 642 and 716 dwellings are likely to consist of flats/units/apartments and between 158 and 402 dwellings are likely to consist of medium-density housing (semi-detached/row/town houses)[21] (refer to Figure 37).

[21] These projections are for types of dwellings, based on the Australian Bureau of Statistics Census reporting of the type of dwelling, not necessarily the density of a development.

Figure 37. Change by Dwelling Type, Greater Taree LGA, 2006-2031

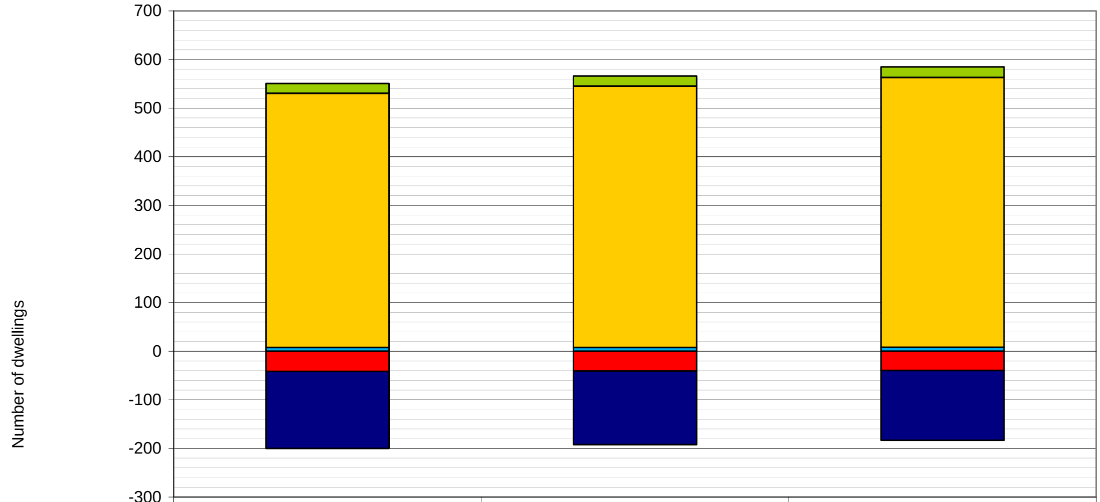


	Scenario 1 (Total increase in dwellings: 9,755)	Scenario 2 (Total increase in dwellings: 10,300)	Scenario 3 (Total increase in dwellings: 10,957)
Other	141	148	158
Flat / unit / apartment	642	676	716
Semi-detached / row / terrace / townhouse	351	374	402
Separate house	8,621	9,102	9,681

Source: SGS Dwelling Forecast Model

The figure below shows the size of dwellings demanded if the increase in dwellings under the three scenarios outlined in the *Local Growth Management Strategy* is achieved according to the estimated demand projected. The figure below shows that growth in three bedroom houses is likely to dominate overall future housing demand in the region.

Figure 38. Change by No of Bedrooms, Greater Taree LGA, 2006-2031



	Scenario 1 (Total increase in dwellings: 9,755)	Scenario 2 (Total increase in dwellings: 10,300)	Scenario 3 (Total increase in dwellings: 10,957)
Five or more bedrooms	0	0	0
Four bedrooms	20	21	22
Three bedrooms	523	538	555
Two bedrooms	-158	-152	-144
One bedroom	-42	-41	-40
None (includes bedsitters)	8	8	8

Source: SGS Dwelling Forecast Model

It is noted that the results of the SGS Dwelling Forecast Model are based on recent trends and are likely to be a reflection of the currently supply of dwellings in the market, in addition to the current dwelling preferences for various household types.

In making housing choices, people may trade off location and amenity for housing types and cost. The types of dwellings demanded may change due to changing preferences and cultural shifts. Over time, it is likely that the demand for separate houses will shift as people become more exposed to a different housing offer – higher quality, higher density, new types of development and urban design outcomes, or offering variety in location, or availability of views.

Future Dwelling Supply

Land Supply

Greater Taree has a significant supply of land suitable and available for development. The issue, however, is not the actual supply of land, rather the location of this land and new dwellings and its ability to cater for market demand. To give an idea of current land supply within the area (both Greater Taree and inner Taree) supply projections from the *GTCC Local Growth Management Strategy, 2007,* have been used. These projections were developed in conjunction with GTCC to inform the MNC Regional Strategy and reflect Council's understanding of likely future policy directions. These are shown in Table 9and indicate an expected future yield of 12,500 dwellings to 2031.

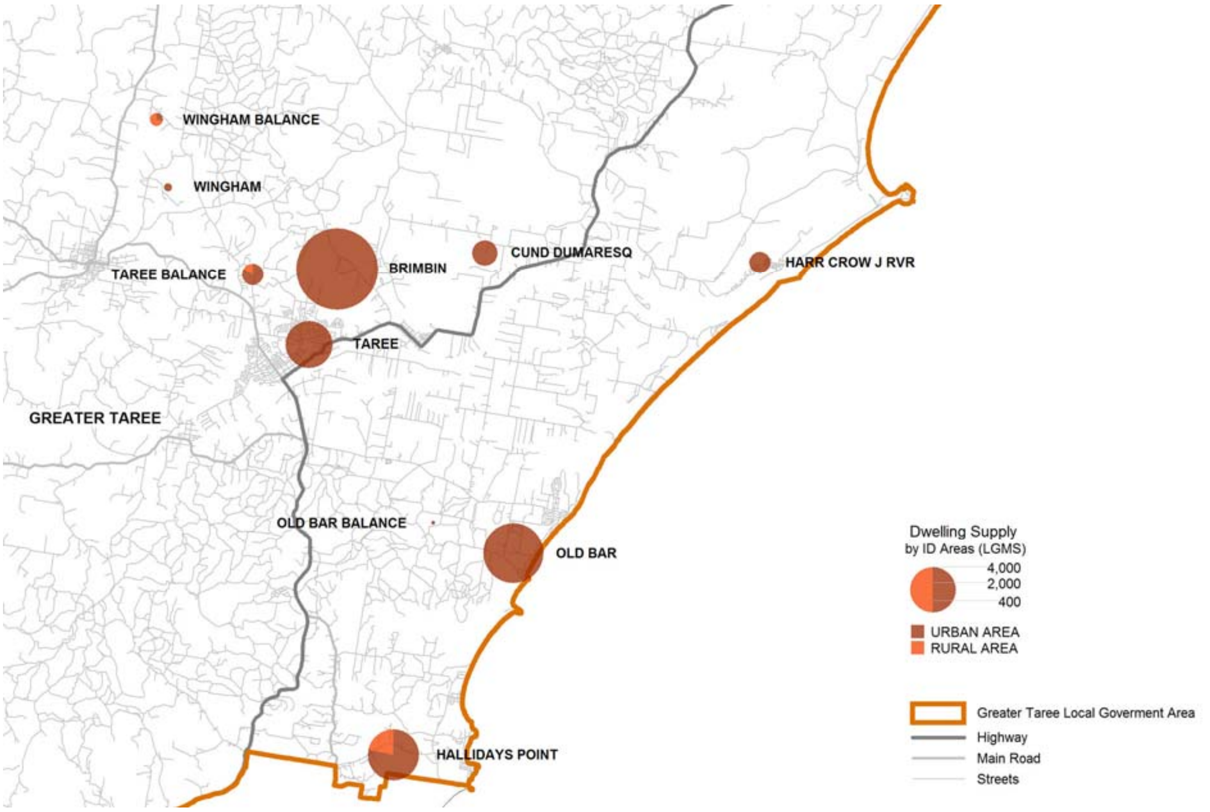
Table 9. Projected Supply, 2006-2031

	Dev. Area	Useable Are (ha)	Yield	Years Supply	Supply Existing (LGMS)[22]	Supply (LGMS)[23]
Greater Taree	4,788	3,385	12,500	692	4,603	11,201
Taree	589	523	2,873	170	1,307	1,566

Source: ID 2007

Much of this growth is anticipated to occur in Inner Taree, and the urban coastal areas of the LGA, including Old Bar, Hallidays Point, and Crowdy/Harrington/Johns River. Based on previous construction trends, Halliday's Point is expected to accommodate an additional 2,035 dwellings, Old Bar (1,600 dwellings) and Crowdy/Harrington/Johns River (1,315 dwellings). An additional 1,370 dwellings is projected for the urban area of Taree (Figure 39).

Figure 39. GTCC Dwelling Supply Forecasts, 2006-2031



Source: SGS Economics and Planning, 2007, (based on GTCC, 2007)

[22] Supply Existing (LGMS) - is the estimated number of dwellings to be achieved from existing zoned and undeveloped land

[23] Supply (LGMS) - is the estimated number of dwellings to be achieved from the various land classifications

Employment[24]

Employed Persons

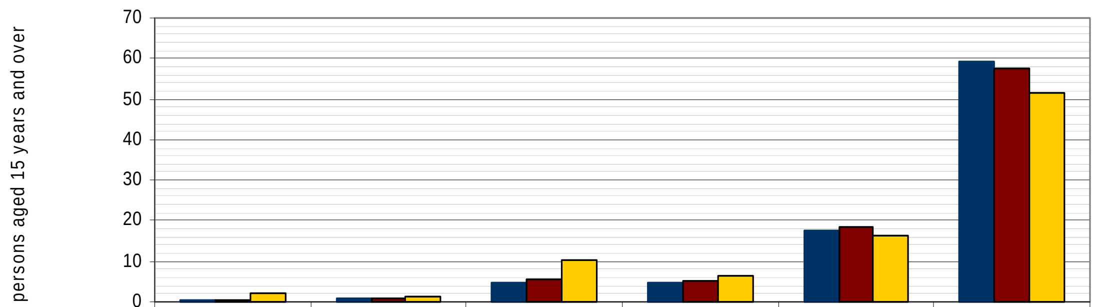
In 2001 the total number of employed persons residing in Greater Taree was 14,348. This represented a slight increase from 14,020 persons in 1996. In 2001 8,387 persons in Greater Taree were employed full-time, while 5,542 persons were employed part-time. The labour force participation rate in 2001 was 49.1 percent, which was very similar to the Mid North Coast with 49.2 percent, compared to NSW which had 59.3 percent. This is indicative of the high proportion of non-working age residents in Taree and the Mid-North Coast.

Qualifications of the Workforce

Figure 40 shows the proportion of Greater Taree's population with qualifications compared with the same proportions for the Mid-North Coast and NSW. Overall, Greater Taree has a higher proportion of residents with no qualifications (59.4 percent), compared to the Mid-North Coast (57.5 percent) and NSW (51.5 percent).

The proportion of Greater Taree residents with a 'certificate' (17.7 percent) was comparable to the Mid-North Coast (18.5 percent), and higher than the NSW average (16.4 percent). However, all other areas of qualifications for Greater Taree are below the NSW averages.

Figure 40. Workforce Qualifications 2001



	Postgraduate Degree	Graduate Diploma and Graduate Certificate	Bachelor Degree	Advanced Diploma and Diploma	Certificate	No Qualification
Greater Taree	0.6	0.9	4.6	4.9	17.7	59.4
Mid-North Coast	0.6	0.9	5.4	5.0	18.5	57.5
NSW	2.2	1.2	10.1	6.2	16.4	51.5

Source: ABS 2006

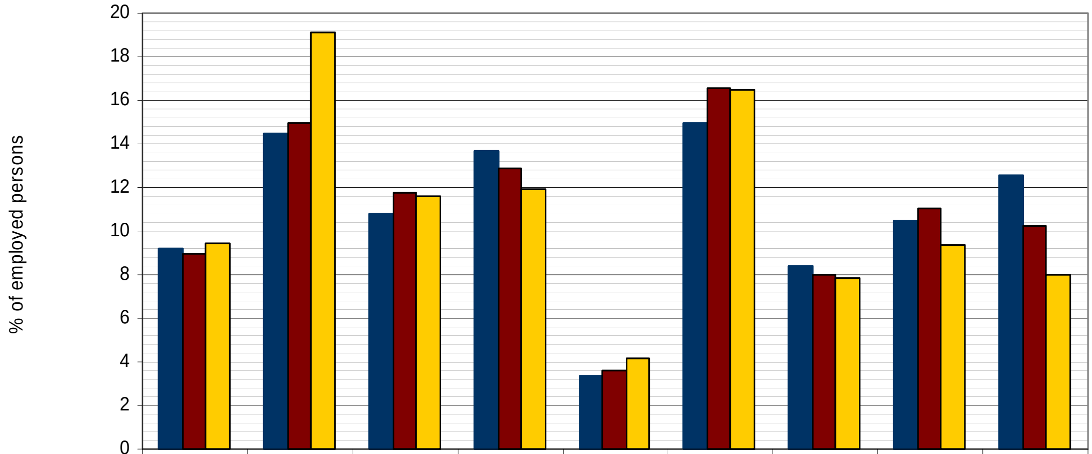
[24] Data shown for labour force characteristics in this report is based on 2001 ABS data. 2006 employment data will not be released until late October 2007. The 2001 ABS data is supplemented with more recent statistics where available.

Occupation

Figure 41 shows the proportional distribution of occupations in Greater Taree compared to the Mid-North Coast and NSW. Greater Taree (14.5 percent) and the Mid-North Coast (15.0 percent) both reveal lower levels of professionals compared with NSW (19.1 percent). It is important to note however that this occupation still made up a high proportion of employment in Greater Taree.

In comparison to NSW and the Mid North Coast Region, Greater Taree had a significantly greater proportion of residents employed as labourers and related workers (12.6 percent) and tradespersons and related workers (13.7 percent).

Figure 41. Employed Persons by Occupation 2001



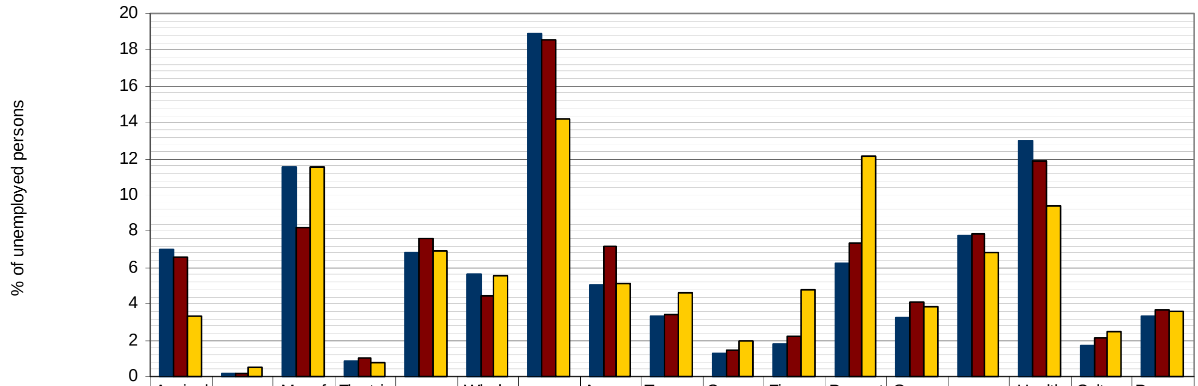
	Managers and Administrators	Professionals	Associate Professionals	Tradespersons and Related Workers	Advanced Clerical and Service	Intermediate Clerical, Sales and Service	Intermediate Production and Transport	Elementary Clerical, Sales and Service	Labourers and Related Workers
Greater Taree	9.2	14.5	10.8	13.7	3.4	15.0	8.4	10.5	12.6
Mid-North Coast	8.9	15.0	11.8	12.8	3.6	16.5	8.0	11.0	10.2
NSW	9.4	19.1	11.6	11.9	4.2	16.5	7.9	9.3	8.0

Source: ABS 2006

Key Industries

As identified in the Taree Economic Profile (HVRF 2005), the Greater Taree economy is becoming increasingly dominated by tertiary rather than primary industries. This is illustrated in the very high proportion of residents employed in the retail trade (18.9 percent) and Health and Community Services (13.0 percent). It is important to note however that in 2001, Manufacturing (11.5 percent) and Agriculture, Fishing and Forestry (7.0 percent) remained important industries in the local economy, despite declining from 1996.

Figure 42. Industry Structure 2001



	Agriculture, Forestr	Mining	Manufacturing	Electricity, Gas	Construction	Wholesale Trade	Retail Trade	Accommodation,	Transport and Storag	Communication	Finance and Insura	Property and Busine	Government Admini	Education	Health and Commu	Cultural and Recrea	Personal and Other
Greater Taree	7.0	0.2	11.5	0.9	6.9	5.6	18.9	5.1	3.4	1.3	1.8	6.2	3.3	7.8	13.0	1.7	3.3
Mid-North Coast	6.6	0.1	8.2	1.0	7.6	4.4	18.6	7.2	3.5	1.4	2.2	7.3	4.1	7.9	11.8	2.1	3.6
NSW	3.4	0.5	11.5	0.7	6.9	5.6	14.2	5.2	4.6	2.0	4.8	12.2	3.8	6.8	9.4	2.5	3.6

Employment Self-Containment

Employment self-containment provides the proportion of employed persons who live and work within Greater Taree LGA. As shown in Figure 43, Greater Taree had 11,599 jobs with a self containment rate of 83.22 percent (i.e., approximately 9,653 people lived and worked in Greater Taree in 2001).

This rate of self containment was consistent with the Mid North Coast, which has a rate of 84.71 percent. Because Taree is a regional centre residents prefer to live close to their place of employment.

Figure 43. Self Containment, Greater Taree, 2001

Destination	Number of Persons	Self Containment Percentage
Greater Taree SLA	11,599	83.22
Hastings	174	1.25
Great Lakes SLA	708	5.08
Total Mid North Coast	11,807	84.71
Total Hunter	807	5.79
Total Far North Coast	12	0.09
Rest of NSW	1,312	9.41
TOTAL	13938	100.00

Source: SGS Economics and Planning

Supply of Retail and Commercial Floorspace

As identified in the *Precinct 2B Open Space, Community and Retail Assessment* (Urbis JHD 2006), there five key retail components within Taree:

- **Taree City Centre** - located on the western side of the intersection of Albert Street and Manning Street and comprises a single level enclosed retail mall, with basement and decked car parking. The centre contains around 15,500 sqm of retail space, anchored by a Big W discount department store and a Woolworths Supermarket. In addition, the centre has a good range of specialty shops, including national chain fashion retailers, fresh food, home wares and general merchandise stores, retail services and a small food court.
- **Manning Mall** – is an older style mall which is located directly opposite Taree City Centre. The centre is based on a Kmart DDS and Bi-Lo supermarket and contains around 10,000 sqm of retail floor space.
- **Manning Street** is the main retail street in Taree, being located between the two malls. The strip contains a mix of large format retailers and independent specialty stores, with the key tenants including an older-style Coles supermarket, Go-Lo, Mitre10 and Retravision.
- **Victoria Street,** which is the route of the old Pacific Highway, contains a mix of retail and other uses, reflecting its former role as the main commercial and retail strip in the town. The street includes several banks and hotels as well as retail stores and cafes/restaurants. The latter have benefited from recent traffic calming initiatives that have made the street more pedestrian-friendly.
- **Pulteney Street and Albert Street** are more peripheral and include a range of independent retailers, large format showrooms, commercial and other non-retail uses. Pulteney Street has the highest incidence of vacant shops in the town, in part reflecting its distance from the main retail core.
- **Oxley Street, Chatham** – There is a cinema complex located on the corner of Oxley and Milligian Streets, Chatham. This is located approximately 700m from the subject site.
- **Farmers Markets -** The Taree farmers markets have been running for approximately fifteen months and are held on the 2nd Saturday of every month in an around the grounds of the PCYC. The mid north coast has a circuit of markets, with one held every Saturday of each month (Wingham, Taree, Forster and Wauchope). This enables the community to purchase fresh produce on a weekly basis. The number of stalls at the Taree Farmers Markets fluctuates due to seasonality; however there are normally approximately 35 stall holders. The markets have a strong and stable customer base with the organiser, Gloria Hays, estimating that 1,000 customers move through the markets every month. The customer base is predominantly from the Taree and Wingham area, the wider Mid North Coast region and a small number from wider afield. Although there continues to be reservations regarding paying higher or similar prices for fresh produce rather than from supermarket/fruit barn, popularity of the markets is growing. The Farmers Markets in Forster and to a lesser degree Taree Markets are very popular with tourists, with significantly increased demand during the holiday period. It is important that local markets only provide local and regional produce, rather than produce brought in from further afield and sold by a middle man.

Demand for Retail and Commercial Floorspace

This Section contains the results of SGS's estimates of future floorspace based on employment growth for Greater Taree LGA. Following is a summary of findings.

Employment Projections

Table 10 shows findings of SGS Economics and Planning's employment projections model. An additional 11,980 jobs are expected to be accommodated in Greater Taree between 2006 and 2031.

Table 10. Total Additional Employment from 2006, Greater Taree, 2007-2031

Year	Total Additional Jobs (from 2006)
2007	276
2008	697
2009	1,141
2010	1,617
2011	2,103
2012	2,601
2013	3,080
2014	3,566
2015	4,055
2016	4,548
2017	5,049
2018	5,529
2019	6,015
2020	6,505
2021	6,997
2022	7,497
2023	7,978
2024	8,464
2025	8,953
2026	9,445
2027	9,958
2028	10,463
2029	10,970
2030	11,475
2031	11,980

Source: SGS Economics and Planning

Table 11 displays the breakdown of the employment forecasts into Australian Bureau of Statistics 1 digit ANZSIC industry classifications. These are reported at five year intervals. Significant growth will be experienced in the Retail Trade; Accommodation, Cafes and Restaurants; and Health and

Community Services industries. Employment in Manufacturing remains an important industry, yet growing at a much slower rate.

Table 11. Total Additional Employment by Industry from 2006, Greater Taree, 2007-2031

Total Additional Jobs by industry (from 2006)	2011	2016	2021	2026	2031
Agriculture, Forestry and Fishing	15	32	48	63	96
Mining	1	2	3	4	6
Manufacturing	146	308	470	632	790
Electricity, Gas & Water Supply	10	22	34	45	58
Construction	0	1	1	2	2
Wholesale Trade	20	42	64	86	111
Retail Trade	708	1,531	2,356	3,181	4,014
Accommodation, Cafes & Rest.	262	569	876	1,184	1,500
Transport & Storage	40	87	134	181	229
Communication Services	37	82	126	171	217
Finance & Insurance	100	222	344	467	592
Property & Business Services	37	84	130	177	228
Govt. Admin. & Defense	7	16	24	33	42
Education	148	318	488	659	839
Health & Community Services	353	758	1,164	1,570	2,006
Cultural & Recreational Services	51	111	171	231	293
Personal & Other Services	168	364	562	759	958
Total	**2,103**	**4,548**	**6,997**	**9,445**	**11,980**

Source: SGS Economics and Planning

Demand for Retail and Commercial Floorspace

Table 12 outlines the projected additional floor space requirements. It is important to note that floor space benchmark ratios are not available for certain industries such as agriculture, mining, education and health (and nor would it make sense to have benchmarks for these industries). Therefore the projected additional floor space calculate only refers to those industries for which benchmarks have been given in Appendix B (Floorspace Assumptions). Appendix B outlines the assumptions for square metres of floor space per employee utilised in calculating floor space projections for Greater Taree.

Demand for additional floorspace will be concentrated in the Retail Trade (158,208sqm), Manufacturing (29,298sqm), Transport and Storage (50,311sqm) and Accommodation, Cafes and Restaurants (43,491sqm).

Table 12. Total Additional Floor Space (sqm) by Industry from 2006, Greater Taree, 2007-2031

Total Additional Floorspace (SQM) by industry (from 2006)	2011	2016	2021	2026	2031
Agriculture, Forestry and Fishing	0	0	0	0	0
Mining	0	0	0	0	0
Manufacturing	10,850	23,034	35,217	47,378	59,294
Electricity, Gas & Water Supply	1,185	2,606	4,030	5,453	6,916
Construction	59	130	200	271	341
Wholesale Trade	4,389	9,268	14,141	19,002	24,360
Retail Trade	27,869	60,339	92,869	125,389	158,208
Accommodation, Cafes & Rest.	7,594	16,492	25,412	34,330	43,491
Transport & Storage	8,829	19,166	29,513	39,843	50,311
Communication Services	4,430	9,793	15,173	20,553	26,066
Finance & Insurance	2,509	5,554	8,609	11,664	14,791
Property & Business Services	935	2,094	3,259	4,423	5,711
Govt. Admin. & Defense	247	547	847	1,147	1,453
Education	0	0	0	0	0
Health & Community Services	0	0	0	0	0
Cultural & Recreational Services	1,783	3,876	5,975	8,073	10,264
Personal & Other Services	4,861	10,567	16,286	22,004	27,785
Total	**75,541**	**163,465**	**251,531**	**339,530**	**428,991**

Source: SGS Economics and Planning

Tourism

Current Profile

The Manning Valley and Mid-North Coast generally has a range of natural and built attractions which has made the area an attractive tourist destination. However the city of Taree is generally regarded as a regional service centre rather than a tourist destination.

Consultation with GTCC's Tourism Manager suggests that the Taree tourism market is segmented between:

i) Holiday Destination Stays
ii) Taree City Centre Stays

Travel to the coastal and hinterland areas of the LGA is 'destination' oriented, with the environment being the primary driver of visitors to the area. While visitation to Taree City Centre is largely driven by attendance at events on the river and in the town, business travel and short-term travel stay (overnight stay between destinations).

Visitation and Expenditure

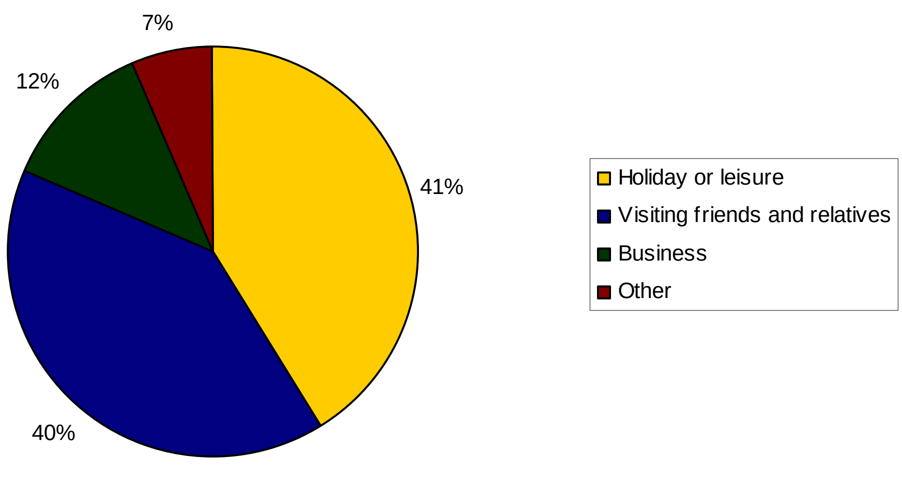
Visitation to Taree LGA is characterised by intra-regional and intra-state travel. On average from 1998 to 2005, 47% of overnight visitors were from Sydney, 41% from other areas of NSW and the remaining 12% originated in other states. In contrast, for the same period, only 14% of domestic day visitors originated from Sydney, and 86% originated from other areas of NSW.

In the year ending December 2006, the North Coast Region received 6.69 million visitors (Tourism NSW 2007). According to National Visitor Survey Data, Taree LGA had 452,000 domestic day visitors and 341,000 domestic overnight visitors in 2006. These overnight visitors spent 693,000 nights in Taree, which indicates an average overnight stay of 2 nights per visitor and represents 11.8% of all visitors to the North Coast Region.

According to Tourism NSW (2007), overnight domestic visitation to Taree is characterised by stays of two nights or longer. Between 1999 and 2004, 29% of visitors stayed in the Taree LGA for two nights, 15% stayed for 3 nights and 26% of domestic visitors stayed for between 4 and 14 nights.

In relation to domestic overnight trips the majority of trips were for holiday and leisure (41%), visiting friends and relatives (40%), and for business (12%) (see Figure 44). In contrast, domestic daytrip visitation was characterised by holiday and leisure seekers (56%) rather than those visiting family and friends (26%). Business travellers were more likely to stay overnight (12%) than stay for the day (8%).

Figure 44. Purpose of Domestic Overnight Trips, Greater Taree LGA, 1998-2005

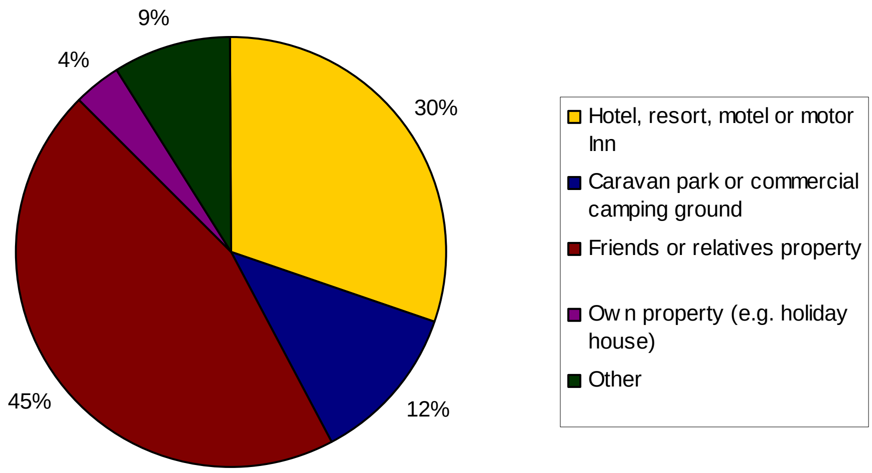


Source: Council of Tourist Associations 2005

The *Mid North Coast Tourism Board's Marketing Plan 2007-2009* (MNCTB 2007) identifies the domestic self drive and leisure target markets as having the highest representation and as the base of the Mid North Coast tourism dollar. The *Taree Economic Profile 2005* (HVRF 2005) notes that the region's tourist market is primarily families with children and retirees travelling with caravans and campervans ('grey nomads'). Data from the Council of Tourist Associations (2005) suggests that the most common visitors to Taree with respect to age are 45-59 years and 35-45 years. Unfortunately, the key target market is susceptible to seasonality.

The major type of accommodation used by domestic visitors is friends or relatives property (45%) and Hotel, resort, motel or motor inns (30%) (Figure 45). Taree has a slightly lower proportion of visitors staying in caravan and holiday park style accommodation (12%) than the region generally (19.2%), but a similar proportion to the state as a whole (11.2%).

Figure 45. Accommodation for Domestic Visitors, 1998-2005



Source: Council of Tourist Associations 2005

Figure 15 below shows average annual domestic visitor expenditure for Greater Taree LGA based on data collected between 1998 and 2005. Tourism is an important industry in Taree, with domestic visitors injecting an average of $140 million into the local economy annually. Over this period, domestic day trip visitors spent $108 on average per person and overnight visitors spent $104 on average per visitor night (Council of Tourist Associations 2005). This compares with an overall tourism expenditure of $1.665 billion for the North Coast Region for the year ending December 2005. Based on these figures, tourism expenditure in Taree makes up 8.4% of total regional expenditure.

Table 13. Domestic Visitor Expenditure, Greater Taree LGA, 1998-2005

Domestic Overnight annual expenditure	$96 million
Domestic Day Trip annual expenditure	$44 million
Total Domestic Visitor annual expenditure	**$140 million**

Source: Council of Tourist Associations 2005

Community Facilities

Health

Greater Taree has a range of basic and specialist medical services. The Manning Base Hospital, Mayo Private Hospital (both located in Taree), Wingham District Hospital and Taree Community Health Centre offer the widest range of services to Greater Taree, and also service surrounding LGAs of Gloucester and Great Lakes[25]. In June 2004 there were 34 GPs located in the LGA, representing a ratio of 1 to 1,263 persons. Although considered reasonable, this ratio doesn't take into account an aged care loading - as aged persons are considered to utilise GP services at a rate three times higher than the general public (Urbis JHD 2006). Given the ageing population in Taree and wider Mid North Coast region generally, this is an important consideration.

Figure 46. Hospital Beds, Greater Taree LGA

Hospital	No. of Beds
Manning Base Hospital (Taree)	166
Wingham District Hospital	32
Mayo Private	46

As a result of the ageing population and influx of retirees, residential aged care and services provision is a growing industry in Taree. According to the Greater Taree Community Plan 2005-11 there are ten aged care facilities within the LGA, two of which have planned expansion, and there are plans for an additional two care providers. These range from assisted living to nursing and respite care, with one being designated as an Aboriginal facility. The Community Plan identifies however that Taree and the LGA generally have a lack of respite care providers.

A Community Health Program has been established to assist with a variety of primary health care issues, and nursing and specialised services. The Biripi Aboriginal Health Centre runs in conjunction with the Community Health Centre to specifically service the Aboriginal community in Greater Taree.

Education

The majority of educational facilities within the Greater Taree region are located in the city of Taree. Although the sufficient provision of primary and secondary educational facilities, the lack of tertiary facilities means that a considerable number of young people have to leave the town in order to access higher education. Table 14 below shows the current provision of education facilities in Taree Community Planning Area (Greater Taree Community Plan 2005-2009) and the Greater Taree LGA.

[25] ibid

Table 14. Education Facilities Taree

	Greater Taree	Taree CPA
Primary Schools	30	13
High Schools	6	5
College	1	
Private Child Care Centres	Information not available	7
Community Pre-schools	Information not available	5 (1 designated for Aboriginal children)
University Shopfront	1	1
Community College	1	1
TAFE Campus	1	1

Community Facilities / Halls

Greater Taree has a wide range of community services and facilities. The larger centres of Taree and Wingam have good access to cultural, leisure and recreational facilities, but due to the distributed population many regional/rural areas suffer from a lack of facilities[26].

The Taree LGA has a number of community centres, the largest being the Taree Community College, a non profit community organisation which offers a number of alternative and accredited vocational and training courses, art, craft and general education. Multipurpose Community Centres have been planned for Harrington, Old Bar and Hallidays Point, the Harrington Centre currently under construction.

With respect to youth services, there are two dedicated youth centres, the PCYC and the Biripi Youth Service (aimed at Indigenous youth). The Greater Taree 2006-09 Strategic Plan for Young People however identified that there is a lack of youth friendly spaces and entertainment opportunities in the LGA.

The Central Greater Taree library is located in Taree, and there is a branch library at Wingham. The City Library also provides outreach community libraries at Old Bar and Hallidays Point. The current floorspace of the Central Library (480 sqm) falls well below Library standards set for NSW, and in response to this a new central library has been included within the 10 Year Financial Plan adopted by Council in 2001. Branch libraries are also planned as major component of the Multipurpose Community Centres currently being planned for Old Bar, Hallidays Point and Harrington.

[26] Greater Taree City Council (2004) Greater Taree Community Profile 2005 - 2009

Appendix B – Floor Space Assumptions

This table outlines the assumptions for square metres of floor space per employee utilised in calculating floor space projections for Greater Taree.

Table 15. Square Metres of Floor Space per Employee by Industry

Industry	Floor Space (sqm) per Employee
Agriculture; hunting and trapping	
Forestry and fishing	
Mining	
Meat and dairy products	100
Other food products	80
Beverages, tobacco products	80
Textiles	60
Clothing and footwear	90
Wood and wood products	45
Paper, printing and publishing	70
Petroleum and coal products	200
Chemicals	200
Rubber and plastic products	150
Non-metallic mineral products	80
Basic metals and products	120
Fabricated metal products	30
Transport equipment	50
Other machinery and equipment	60
Miscellaneous manufacturing	65
Electricity, gas and water	120
Construction	150
Wholesale trade	220
Retail trade	37
Repairs	55
Accommodation, cafes and restaurants	29
Transport and storage	220
Communication services	120
Finance and insurance	25
Ownership of dwellings	
Property and business services	25
Government administration	35
Education	
Health and community services	
Cultural and recreational services	35
Personal and other services	29

Source: SGS Economics and Planning

Appendix C – Community Facilities Benchmarks and Definitions

Level	Community Facility	Benchmark for Provision (# per population)	Responsibility	Benchmark for Minimum Provision (# per population)	Population category
Local	Community Meeting Room/Multi-purpose hall	1:6-10,000	Council/State/Federal	6,000	Total
	Childcare Centre	1:4-8,000	Council/Private	4,000	Total
	Preschool	1:7,500-10,000	Private	7,500	Total
	Primary School	1:4,500-5,000	State/Private	4,500	Total
District	Multi-purpose Community Centre/Civic Centre	1:20-30,000	Council/State/Federal	20,000	Total
	High School	1:14,000-18,000	State/Private	14,000	Total
	Youth Facility/Service	1:20,000	Council/State/others	20,000	Total
	Branch Library	1:15,000-30,000	Council	15,000	Total
	Aged Care Service/Respite Centre	1:10-20,000	Council/Federal/Private	10,000	Total
	Community Health Centre	1:20-30,000	Council	20,000	Total
	Police	1:20-30,000	State	20,000	Total
	Fire & Rescue	1:25,000	State	25,000	Total
	Ambulance	1:25,000	State	25,000	Total
	State Emergency Service (SES)	1:25,000	State	25,000	Total
Whole of Council	Art Gallery	1:30-150,000	Council/State/Federal	100,000	Total
	Museum	1:30-120,000	Council/State/Federal	100,000	Total
	Performing Arts/Exhibition/Convention Centre	1:50-200,000	Council/State/Federal	100,000	Total
	Central Library	1:30-50000	Counil		Total
	Hospital - Public	2.6 beds/1,000 people	State	150,000	Total
	TAFE District Facility	1:150,000	State	150,000	Total

Hierarchy	Community Facility	Definition
Local	Community Meeting Centre/Hall	General community use facility providing meeting spaces; social, educational and recreational activities; and/or health, support and information.
	Childcare centre	Facilities that provide Long Day Care, Limited Hours/Occasional Care and 24 hour care for children under the age of five. Centres may also offer care for school aged children (before and after school).
	Preschool	Preschools in public schools provide educational programs for children for one year prior to enrolment in Kindergarten. A child may be eligible for enrolment in preschool from the beginning of the school year if they turn four years on or before 31 July that year.
	Primary School	Primary schools are educational facilities for students between the ages of 6 and 12, offering Preparatory through to Year 6 (P-7).

Hierarchy	Community Facility	Definition
District	Multi-purpose Community Centre/Civic Centre	General community use facility providing meeting spaces; social, educational and recreational activities; and/or health, support and information
	High School	Secondary schools are educational and training facilities for students between the ages of 13 and 18.
	Youth Facility/Service	A youth centre is a community centre specialising in meeting the needs of young people. The facility usually houses a youth worker or program co-ordinator to deliver on site and outreach youth programs and services. Youth centres may be accommodated within multipurpose facilities but require a specific focus.
	Branch Library	A branch library caters for a more localised area offers access to both text and online resources for learning, and can also incorporate meeting spaces and areas for study.
	Aged Care Centre	A facility providing an operational base of services targeted at older people such as domiciliary care, Meals On Wheels and other services. Facilities can cater to individual service providers or a collection of services providers.
	Neighbourhood Centre	General community use facility providing meeting spaces; social, educational and recreational activities; and/or health, support and information.
	Community Health Centre	Community Health Centres provide primary health care services including maternal and child health, audiology, allied health services, oral health, counselling, social work and information and referral. These centres generally service a large local or district population and may provide outreach services through local community centres and halls.
Regional	Art Gallery	Art Galleries provide exhibition spaces, and may offer educational programs, as well as meeting and workshop space for artists. Galleries are often co-located with Libraries, Civic buildings and Museums
	Museum	A building, place, or institution devoted to the acquisition, conservation, study, exhibition, and educational interpretation of objects having scientific, historical, or artistic value.

Hierarchy	Community Facility	Definition
	Performing Arts/Exhibition/Convention Centre *	A convention centre is a large, cavernous public building with enough open space to host public and private business and social events. It includes an exhibition hall, or conference centre. Events held in convention centres can include: corporate conferences, industry trade shows, formal dances, entertainment spectacles and concerts.
	Hospital - Public	A hospital is a health care institution that provides day patient, emergency and inpatient clinical, care and treatment for people who are unwell or injured. A range of allied, medical, surgical, preventative, diagnostic and treatment services are generally provided in association with day patient and overnight hospital stays.
	TAFE District Facility	TAFE colleges provide vocational education and training services in a broad range of industry areas. Courses are delivered on campus (classroom delivery), in the workplace, online and by distance or by a combination of these modes.
	University	Universities provide tertiary education with teaching and research facilities constituting a graduate school and professional schools that award master's degrees and doctorates and an undergraduate division that awards bachelor's degrees
	Cemetery	Parcels of land used for the interment of deceased persons through burial or other memorialisation, including retention of cremated remains. May be public or private, the private usually being of a specific religious denomination. Lawn cemeteries generally require large tracts of land and may incorporate gardens for the memorialisation of cremated remains.

Appendix D – Comparable Case Studies

The Marina Hindmarsh Island, Murray River, South Australia

Overview

Location and Character

- An hour's drive South of Adelaide (near Goolwa, South Australia)
- Hindmarsh Island is close to the coastal towns of Goolwa, Victor Harbour and Port Elliot
- Surf beaches, wineries, a golf club and Coorong National Park are located in the local region.

Mix of Land Use at the Site

- Residential
- Marina
- "Club Marina holidays" (4.5 star self-contained accommodation)
- Retail – including a tavern, marina-associated retail (including Chandlery) and general store

Detailed Description of Land Use

Marina

- Land use around the Marina includes a mix of retail, recreational and service facilities.
- Marina-related services include a waterside fuel station, public toilets and chandlery.

Residential

- A mix of 'land only' and 'house and land' packages are available.
- Residential development includes waterfront lots and terraces including:
  - 22 land allotments (ranging in size from 446m^2 to 562m^2)
  - 8 large 'premium' waterfront allotments ranging in size from 1,573m^2 to 3,148m^2). All with water frontages ranging from 16.6m to 120.7m all with large private jetties
  - Terrace homes
- The properties are marketed as permanent residents, holiday homes and investment properties.
- For investors, owners have the option to lease the property with the Marina's "Holiday Accommodation

Pool" though ClubMarina Holidays.

- Residential 'land only' lots range from: $89,500-$399,000.
- House and land packages range from: mid to late $400,000s for a 3-bedroom terrace or home to high $700,000s for a large waterfront house with mooring.

Commercial / Retail

- Limited retail development around the marina including a waterfront Tavern, and marina-related retail (including a boat broker, Chandlery, charter boats etc)

Tourism / Leisure

- Club Marina Holidays - 4.5 star self-contained holiday accommodation in some 'residential' development
- Leisure related activities associated with the marina including chartered boats and links to tour companies based in Goolwa.

Community

- Heritage has been incorporated into the development by naming roads within the development after the paddle steamers which were constructed in Goolwa at the height of the River Murray's busy trading era.
- The 'lagoons' in the residential development were named after the area's earliest explorers while the islands which lie within them carry the names of birds commonly found on and near Hindmarsh Island.
- Tennis courts, playground, bbq areas and galley kitchen are located close to the marina.

Staging of the Development

Staging

Staging of development (in order of construction)

1. Construction of marina (and retail)
2. Residential development (waterfront lots sold first, followed by 'conventional' and premium waterfront lots)
3. The staging of the development appears to be driven by planning / development consent.

Harrington Waters, Mid-North Coast, NSW

Overview

Location and Character

- Located on the mid-north coast at the mouth of the Manning River
- 20 minutes drive from Taree, 45 minutes drive from Forster or Port Macquarie
- Approximately three hour's north of Sydney
- The development is adjacent to a national park.

Mix of Land Use at the Site

- Marina
- 2 waterfront retail precincts ('Harbour village' retail and a Tavern, Lodge and Resort complex)
- Shopping centre complex
- Residential development
- Golf Course

Image

Detailed Description of Land Use

Marina

- Currently a 20-berth marina (a larger marina is planned)

Residential

- Predominantly house and land packages. Townhouses are also located at the site.
- Houses available include 3 to 4 bedroom homes. Houses are designed to be waterfront and golf course oriented.
- Townhouses are 3-bedroom with double LUG, balconies and views
- Residential development at the site is 1 or 2 storey.

Commercial / Retail

- Three separate retail / commercial precincts

Harrington Waters Harbour Village

- Retail development focused around the Marina and is water -associated.
- Includes a Café (with art exhibition space) - local produce (seafood, Manning Valley Beef and organic produce) is sold at the café.
- Other small / boutique retail (e.g., hair and beauty salon, bakery, women's wear boutique, Harbourside Cellars)
- Currently contains development-related uses (e.g., Real estate agent, home manufacturer, nursery/garden centre). It is likely that these uses will be phased out once residential development at the site is complete.

Tavern, Lodge and Resort Complex

- Irish Tavern overlooking the Manning River
- Harrington's River Lodge (includes 23 rooms)

New Shopping Centre

- 10 specialty shops (including Coles)
- Community centre and library
- Non-denominational church (100 seats)
- Parking for 200 cars

Tourism / Leisure

- Golf Course (with Café/bistro and pro shop)

Community

- Community centre and library are being constructed at the new shopping centre

Staging of the Development

Staging and Sales

Staging of development (in order of construction)

1. Harbour village shops
2. Residential (constructed);
3. Golf course (constructed);
4. Marina (currently 20-berth, larger marina is planned);
5. Irish Tavern and Harrington's River Lodge (Construction to be completed in November 2007)
6. Resort-style accommodation;
7. New shopping centre, community facilities and interdenominational church (To be completed March 2008)

Shell Cove, Illawarra, NSW

Overview

Location and Character

- Shellcove is 20 minutes (17 km) from Wollongong and directly south of the township of Shellharbour. The development is adjacent to Killalea State Park.
- 100 hectare site with beachfront access.
- Current land use at the site is Shellharbour Swamp, farmland and an old golf course.

Mix of Land Use at the Site

- Major residential and tourist complex.
- Numerous residential precincts.
- Marina precinct will incorporate a district town centre, community facilities, open space, marina maintenance services, hotel and residential

Image

SGS Economics & Planning

Detailed Description of Land Use

Marina

- 300-300 berth marina in a 20h harbour
- Groynes and seawalls will also have to be constructed so that the development has minimal environmental impact on the surrounding landscape.

Residential

- Around 1000 new dwellings in the marina precinct.
- Residential development is focused around a boat harbour precinct and marina.
- 400 apartments, 400 medium density and 200 separate houses (some prestige oceanfront)
- Apartment will be clustered around the town centre and marina to ensure vibrancy
- Medium / high-density housing is also planned for the site (later stages of development).
- Marketing is focused at owner-occupiers but rental properties also available.
- Demographics are expected to mainly consist of young families in the separate and medium density dwellings and empty nesters and downsizers (Sydney and local) for the high density dwellings.

Commercial / Retail

- A further mixed use area (incorporating retail/commercial/residential/hotel) is to be situated in the centre of the development, which will be surrounded by the proposed boat harbour.
- Approximately 8,000 sqm of retail/commercial floor space (excluding the hotel) is planned in the marina precinct.
- 3000sqm supermarket
- 20 speciality stores
- Marine and Tourism related retail as well as population oriented
- Potential for a 30,000sqm technology and business park

Tourism / Leisure

- The proposed boat harbour aims to enhance leisure and recreational appeal, and provide a focus for nature and cultural based tourism. (The Shell Cove Marina has been identified as a specific tourism precinct with the region in the Draft Illawarra Regional Strategy).
- The mixed use Shell Cove Marina precinct will include a 150 room hotel and the potential for a second hotel later in the development stages

Community

- The development has incorporated a significant amount of open space, ("to keep in character with the surrounding landscape").
- There will be public access along the entire foreshore through a boardwalk promenade. This promenade will widen in places to provide space for passive recreation (BBQs, Picnics etc)
- Community centre, Information centre and branch library will also be located in the town centre
- It is planned that some existing cycle (bike circuit) and pathways be extended through the development.

Staging of the Development

Staging and Sales

Staging of development (in order of construction)

1. The Marina and Harbour will commence construction shortly and is expected to take 3 years
2. Development of the retail precinct will begin over the next 18 months (2008/09) and will be completed with the Marina in 2011/12. The retail / commercial development is expected to be completed with the construction of the boat harbour so that the harbour does not sit surrounded by vacant land.
3. Residential development is to be staged with new land releases occurring as they are needed – a total of 10 stages are planned. Residential construction is anticipated to be completed by 2018. Initial construction will focus around the town centre – high and medium density and staged to test the market for this product.

Honeysuckle Marina Precinct, Newcastle

Overview

Location and Character

- 50 hectare site on ex-Port and railway land, Newcastle harbour (including 4km of waterfront land)

Mix of Land Use at the Site

Made up of 7 precincts. The development includes the following land uses:

- Residential
- Commercial
- Retail
- Marina
- Public open space (boardwalk)

Image

Detailed Description of Land Use

Marina

- Development in the marina precinct includes a ship chandler, yacht broker, café and beauty clinic, and the Fishermans Co-op.

Residential

- Mix of residential development available.
- Currently around 1,000 people live in residential complexes at Honeysuckle.
- Affordable housing program.

Commercial / Retail

- Commercial office space (large and small floorplate)
- Major commercial including PriceWaterhouse Coopers building.
- Focus of water-related retail around the marina (e.g., fish and chips from the co-op) as well as marina-related retail.

Tourism / Leisure

- Honeysuckle development aims to help boost the cruise ship sector in the region
- Includes a Crowne Plaza Hotel (with restaurants, cafes and accommodation)

Community

- Continuous walking and cycling paths throughout the precinct (along the waterfront boardwalk)
- Development aims to maximise accessibility and permeability
- 10 hectares of open space
- Includes refurbishment of heritage buildings. Each precinct has been designed to share the history of the port of Newcastle.

Staging of the Development

Staging

- Development at the site is guided by a masterplan. The masterplan has been adjusted to changes to planning guidelines and contamination and environmental regulations.
- The construction and timing of development varies between precincts.
- Many of the community works projects were completed early in the development process.

Mildura Marina, Victoria

Overview

Location and Character

- Walking distance to Mildura Town Centre (the development aims to provide a better link between the Town Centre and the Murray River.
- 270 metres of river frontage along the Murray River
- 13.05 hectare site

Mix of Land Use at the Site

To consist of 5 precincts, including:

- Hotel
- Residential lots (riverside and on the marina)
- Retail precinct
- Marina

Image

Description of Land Use

Marina

- A 4 hectare marine basin.

Residential

- The development will consist of 15 waterfront homesites, 24 harbour font villas, 48 other villas and 24 mid-rise apartments.
- Residential development takes advantage of the water views where possible.
- The residential allotments will all be under freehold titles.
- Purchasers of residential development on the site have mainly been owner-occupiers – particularly owner-occupiers from the local community (estimated 70%) as well as investors and purchasers from outside the community.
- There has been good take-up of sites on the development; the rest of the residential development is staged.
- The lack of availability of riverfront land in Mildura is one of the key drivers of demand. There is very little opposition from competing development.

Commercial / Retail

- Retail precinct site of approx. 5,500sqm gross floor area, with 1,500 sqm net floor area.
- Retail precinct is expected to focus on marine tourism and retail.
- The developer is trying to attract 'premium quality' retail outlets at the site.

Tourism / Leisure

- The hotel precinct will feature a 150 room 3-4 star hotel, with conference facilities.
- Mildura has a number of motels and caravan parks, with only 2 hotels and a 'tavern' in the city.
- The development is surrounded by recreational facilities including the Mildura Lawn Tennis Club and other sport facilities.
- The development aims to attract Marine focused tourism.

Community

- Passive recreation, public car parking and bus terminals are being planned for the site and are provided as part of the of the development plan.
- Open space will incorporate formal ornate gardens with water features and natural riparian land.
- Mildura has well established sporting, recreational and leisure facilities, and services such as hospitals,

medical, business, schools, and airports in close proximity to the site.

Staging of Development

Staging and Sales

1. All homesites were sold off-the-plan, the harbour front and harbour view villas are being designed now and purchasers can make inquiries now.
2. The mid-rise apartment complex will be released for sale after the villas.
3. Design work for the hotel precinct is underway with construction to commence soon.
4. The retail precinct is yet to be developed.

11th December 2008

Anthony Elias
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cc. Holly Marlin
Sinclair Knight Merz
Environmental Scientist
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710 Hunter St, Newcastle West, 2302
Email: HMarlin@skm.com.au

Dear Anthony,

Re: Adequacy of the Preliminary Economic and Social Impact Assessment report submitted in support of the Environmental Assessment of the Pitt Street, Taree, Waterfront Precinct Concept Plan

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This letter outlines the review SGS Economics and Planning Pty Ltd has completed to determine whether our original report is sufficiently detailed to support the compilation of an Environmental Assessment Report (EAR). The EAR is required to accompany the Pitt Street, Taree, Waterfront Precinct Concept Plan development application process.

I confirm that in completing these assessments, I have:

- Read the Director General's Requirements for an EAR;
- Reviewed the most recent Pitt Street Concept;
- Reviewed the findings of our report (prepared for the initial rezoning application); and,
- Provided statements regarding whether there is sufficient information to address the requirements of the EAR, and/or whether there are any omissions.

Our overall finding is that the SGS report includes pertinent and current information that will greatly assist in the development of an EAR. However, it is emphasized that SGS's report was a preliminary economic and social assessment to inform the development of the concept, as opposed to a socio-economic impact assessment.

It has been a pleasure to complete these assessments on your behalf. Should you wish to further discuss the progression of a socio-economic impact assessment please do not hesitate to contact me. I have attached examples of SGS's recent experience in such assessments for your information in Attachment 1.

Kind regards,

Vanessa Bennett , Director

Attachment 1: SGS Economics and Planning Pty Ltd
Examples of Recent Relevant Experience in Socio-Economic Impact Assessments

- **Social Impact Assessment for Rocky Springs (2008):** Following the completion of a Social Planning Report for Rocky Springs, SGS was retained to complete a social impact assessment on the Rocky Springs development. The study included positive and negative effects of the proposed development on the people living in and around the development; positive and negative effects on the people using facilities in the development; and the anticipated effects on the viability and vitality of other key elements within the broader Townsville region. The Study was a key component for Delfin's application for Rocky Springs.

- **Social Impact Assessment: Milford and Highbury Town Centres (2007):** Highbury Limited and Milford Central Limited c/o SKM have recently taken over ownership and management of two town centres in North Shore City Council – Highbury and Milford. These assets are run down and in need of revitalisation. Increased residential densities are proposed as one component of the overall redevelopment. The intensification of these centres is in line with Auckland Regional Growth Strategy and policies to increase population and jobs in and around centres. However, few District Plans have been updated to reflect the regional policy setting. A plan change is being sought in order to permit the redevelopment proposed. The SIA includes an assessment of the risks associated with potential impacts and the development of mitigation strategies to remove or lessen these impacts on affected individuals and populations.

- **Economic and Social Impact Assessment Landsborough to Nambour Rail Corridor Project (2008):** SGS was commissioned to undertake an economic and social impact assessment of the proposed public transport corridor between Landsborough to Nambour on the Sunshine Coast. The assessment was undertaken for various options to identify a preferred corridor option, with a focus on employment and economic impacts, as well as residential amenity impacts. The assessment outcomes were informed by a regional input output model (compiled by SGS) and the outcomes were incorporated into the Landsborough to Nambour Rail Corridor Project. This project is considered a significant project under the State Development and Public Works Organisation Act 1971 (Qld).

- **Defence Force Socio-Economic Impact Assessment Study (2007):** SGS was commissioned by the Australian Department of Defence to undertake a socio-economic impact study on the potential closure of one of their barracks. SGS prepared a comprehensive socio-economic profile of the study region and an assessment of the economic contribution of the barracks to the regional economy through manipulation and localisation of input output tables. The study involved stakeholder consultation, including a survey of barracks personnel, public forums, focus groups and interviews.

- **Christmas Island Phosphates (Sub consultants to Tallegalla Consultants Pty Ltd) (2003):** SGS was commissioned by Phosphate Resources Limited (trading as Christmas Island Phosphate - CIP) and Tallegalla Consultants (TC) to outline the likely socio-economic impacts on the Christmas Island and Australian economies associated with the granting or non-granting of further phosphate mining leases on Christmas Island. The economic impact report was part of a wider Environmental Impact Statement required to accompany the mining applications. The report also included discussions on opportunities for diversification and re-skilling CIP employees.

- **Weipa, Jabiru & Clermont Socio-Economic Baseline Study (2007):** SGS prepared a socio-economic baseline study for Weipa township in Far North Queensland, Jabiru in NT, and Clermont. The studies analysed baseline information to contribute to planning, monitoring and evaluation of Community Relations Programmes and closure planning at the Rio Tinto Weipa operations. The operations and the surrounding communities are changing rapidly and precise baseline data is required as both a planning and measuring tool.